Technology Corner: The Mobile Warrior's Briefcase, Part 1 (organization)

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It's really all about data. Access to information is the foundation of effective advocacy. We include exhibits to support our claims of facts and weave those facts into our declarations. However, anything can happen at court. Evidence we thought of marginal importance can become significant in response to claims made by an adversary. In order to be effective, it is helpful to have quick access to information. To have access to information, we must be organized.

How To Get Organized

Organization starts in the office. When a document comes into or leaves the office, it must be digitized. Every office should have at least one high speed scanner. Most modern copy machines have a scan function. If you are operating on a shoestring budget, I recommend getting a fast 2-sided desktop scanner and Adobe DC Professional (which is the current professional version). I recommend the Adobe monthly subscription, so that you always have the current updates. Adobe also has an iPad app that allows a person to edit, highlight, and sign documents.

Folders

It is easy to scan and lose documents – especially given the volume of data coming into the office on a daily basis. Once you have your documents scanned into your system (server, computer, cloud storage, etc.), you need to organize the documents so that you do not lose them. Your organization methods should be consistent with your mental organization processes. For my office, we developed our digital database around the organizational partitions of our physical files. This is done by creating folders and sub-folders. The main folder structure under a client's name (which is a folder organized by last name, comma, first name), such as Lederman, David. Within that folder, we have at least the following folder entries:

Correspondence (with sub folders for: Drafts, Ours, Theirs);

Client Pleadings (with subfolders for: Drafts, Partially signed, Control (which are the fully signed documents) and Filed);

Opposing Pleadings;

Notes (with subfolders for: Intake sheet, Legal Services Agreements, Research and other notes);

Order (with subfolders for: drafts, partially signed, Control, and Filed);

Reports (with subfolders for Family Court Services, Financial, and Custody Evaluations);

Evidence (with subfolders for whatever categories we need, including: Taxes, Banking, Photos, Emails, Retirement).

Naming Conventions

Having folder system that makes sense to the individual user is a first step, but this step has little value unless there is a naming system within the folder structure that the user can understand and quickly access information. We organize our files based on "Name." In order for a system to work it needs to be slavishly adhered to. Every document (file) in our database has a date indicator at the beginning of the file name. If your files organize by name and you include a consistent date tracking system, all of the documents will line up chronologically. Next, we need a standard abbreviation system, such as Order After Hearing ("OAH") regarding Child Custody ("CC"), Child Visitation ("CV"), Child Support ("CS") and Spousal Support ("SS"). We use the following: 2 digit year, 2 digit month, 2 digit day, and document abbreviation: For example an Order After

Hearing filed on January 1st 2019 will be located in the Filed Orders subfolder (of the Orders folder) as "190101. OAH.CC.CV.CS.SS."

Note, the date modifier system needs to be consistent. If you do not use the 2 digit date modifier as described above consistently, the documents will not line up as intended in the file folder and you will lose important documents. The titling and abbreviation system needs to be intuitive so that when an attorney opens the folder, the attorney can quickly review the files and find the needed document. If the folder is not well organized an attorney can waste significant billable time looking for documents that ought be quickly available. Once a system is in place, the attorney must educate his or her team to understand how naming convention and file organization protocols.

So, if you have not done so, between now and the next edition of Family Law News, develop your file organization system. Once your system is in place, we can start working on the magic of turning organization into effective advocacy.