New York State Bar Association
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Survey Results
& Analysis

for

2011 Elder Law Section
Practice Management& Technology
Survey

Thursday, November 10, 2011

Executive Summary

This report contains a detailed statistical analysis of the results to the survey titled *2011 Elder Law Practice Management& Technology*. The results analysis includes answers from all respondents who took the survey in the 22 day period from Tuesday, October 18, 2011 to Tuesday, November 08, 2011. 119 completed responses were received to the survey during this time.

This survey was distributed electronically to 2,530 section members on October 18, 2011 with a deadline of November 4, 2011. A reminder messagewas sent on October 31, 2011.

Survey Results & Analysis

Survey:2011 Elder Law Practice Mgmt& Technology
Responses Received:119

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1) Have you come up with an efficient method of delegating tasks to staff (i.e., "To Dos" and a Master List of open matters)?

Response	Count	Percent
Yes	35	31.0%
No	31	27.4%
Sort of	47	41.6%

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2) If you do have an efficient method of delegating tasks to staff, please describe what methods you use:

If you do have an efficient method of delegating tasks to staff, please describe what methods you use:
weekly meetings, e-mail, phone calls, e-mail invites
We use a master excel spreadsheet to track open matters and remaining steps, so that everyone can see what remains to be done on all of our open files.
Our procedures have been developed over many years and are not unique.
I now work solo (part-time), so keep call/do task lists, etc.
We have one assistant who works 2 days per week. We give her a pile of work to do each day. She returns all files to the assigning attorney when she leaves for follow up. Obviously, this system would not work well in a larger office.

voice
Master List of open matters; calendaring follow-up by staff and attorneys
not satisfied,
We keep a "Master Calendar" of active files and things that need to be done on tham. We have a meeting every week or two where we go over each case and who is doing what on it. One person is in charge of delegating tasks. We also use Abacus to track tasks, and we have a calendar boook with deadlines, etc
1. To Dos and 2. Segregated piles marked for "consult letters", "drafting", "letters post-signing" etc.
I have a list of all open matters
A pile of tasks to be done, with notes on each file as to what needs to be done, and the requirement that the file be returned to the attorney with the initials of the person who completed the task and the date, on each "to do" note. When attorney delegates each file, the attorney's calendar is marked for follow up to ensure that the item is completed.
master list on excel
Master List, email, follow up response to emails
Most of the tasks are assigned by area; one paralegal works on Estate Matters, another works on Medicaid matters; and a third legal assistant tracks the real estate matters. Support staff for phones, scanning, mailings...
Not applicable- solo practice with no staff.
I delegate through the to do list on TimeMatters.
Since there was no question on your survey for other comments, I used this one for that purpose. I am a retired attorney, age 87, practicing 50+ years. Since discontinuance of a 3 man partnership about 20 years ago, I elected to continue practice in a "home office", of which I am sure there are many practicioners. Such practices are usually limited to one or two areas of law usually all of which are connected in one way or another with elder law matters. They consist generally of wills and estates, real property sales and mostly conferences about medicare, medicaid, social security etc. In my opinion technology more than practice management best serves practicioners like myself, although management concerns of a single practicioner should also be of concern.
Each attorney has one paralegal. Daily interaction works well.
Assign tasks using Time Matters & put on hand written list of open matters for person
Check lists, I am a new sole practitioner and have no one to whom I can delegate.
I have 20 yrs of my own templates in Word and Excel for most document preparation. I use Excel to create Dockets eg for Medicaid applications and recerts, Estate Administration, general elderlaw planning matters. I try to keep them up to date. I have used Amicus Attorney since 1997 to diary everything.
Master List of Trust, Estate and Medicaid Files assigned to paralegals. It is on excel so it is "sortable" by various categories: attorney, date of death, paralegal, nature of file, date 706 is due, etc. Also, we have an elder law coordinator who is a paralegal who intakes new clients. She has

criterial of how to get an attorney assigned to the file and monitors the files to completion.
Outlook task manager, Microsoft OneNote
Use Delegated "ToDo's" programmed into TimeMatters case management system.
Staff members are broken down into departments (i.e. Guardianship, Estates, etc.). The staff member is trained in that area and work performed is reported on a master client list for each department.
Whenever a matter is opened up and delegated, a "matter" is created in time matters. The progress of every assigned matter is reviewed weekly on Mondays.
deal with things immediately; make sure you have competent people in place
Employee is informed of her duties when file is opened.
simple paper to do list.
I answered question one "Sort Of" because I have no staff. I am an attorney in private practice with no staff. I find that I am able to handle all administrative matters for my clients by ensuring that my caseload is not overly cumbersome. This, of course, is a great challenge.
I have recently started to have frequent staff meetings (in theory every day but in practice a few times a week) where we go over what is open, who is working on it and what is the status. It has helped tremendously.
hand written notes, occasionally I leave a voice mail.
Robust CRM system - assigning tasks, priorities, updates, alerts and connecting with client history. I have access to all task activity and progress. Although practicing as a pvt wealth advisor and not an attorney with 2 other full time planners and 2 in admin staff, the practice mgmt issues I experience are analagous to those of many legal practitioners - and an area in which I have expended much effort and some $.
I have no staff
We use AIM/Perfect Law program - it allows for To Do's which can be assigned to various staff members. Try to use it.
TimeMatters
I use outlook caledar to "tickle" dates for responses from staff or clients for the completion of tasks or return of information etc
Rocketmatter Task list
I give em projects to work on, with advance instructions for what to do when the office gets responses or info requested. Some of these projects are similar to each file, so the staff (I have two paralegals) knows what to do.
To do list/ Master list
written messages in out box
all deadlines are triple-calendared: Red book, Outlook and Blackberry. The Red book and Outlook are checked regularly, and the weeklong calendar is checked in advance.

Salesforce.com
We just keep an on-going list of projects with weekly updates on progress.
Computer listing of items to be done Client list with notes
Outlook and spreadsheets
Use Time & Billing Matters program to send items to staff to "Review", then also put item on a To Do list. Then Check Review lists. Works fairly well enough so I chose "Yes" rather than "Sort of"
Chaos Itellect Software
spreadsheet of open matters
I discuss the client's issues, the concerns, the aproach to advise the client and propoaed solutions with my paralegal andthen ask for her input. We then decide what are the tasks that she will perform and the scheduled dead lines.
Go throuogh the To Do list occasionally and update it.
Highrise
Solo Practioner
Small office, just ask the secretary
As a task is handed to a staff member, it is cross-referenced to our Amicus Attorney database file notes.

3) If you do not have an efficient method of delegating tasks to staff, please describe what is troublesome about your current method(s)?

If you do not have an efficient method of delegating tasks to staff, please describe what is troublesome about your current method(s)?
The problem with the spreadsheet is that it requires manual updates by the users. We have attempted to use TimeMatters for tracking assignments, but have found that program frustrating (although we use it to diary reminders and appointments).
the lawyers don't feel that certain paralegals are more qualified then the new lawyers out of law school
Staying on top of open matters or matters where client needs to return certain documents or provide comments
I use Practice Management to create notes and assign deadlines. However, I am the only partner who does this consistently. I also have a dry erase board in my office but am not consistent in using it.
No staff!!! :-)

Significant disconnect with the older attorneys in the firm not utilizing the software that some of the younger attorneys are capable of using; significant resistance from staff who allege that additional steps required to implement systems adds too much to their already over loaded plate.
solo practice with less experienced staff, Use microsoft outlook, but my setup seems to clutter my own screens. Further, trouble with duplicated entries (intermitently in e-mail, often on task list - NOTE this seems to be a known & unresolved bug with Exchange 2010 & Outlook 2010)
n/a
One staff person -- delegating is really not an issue I deal with in the small firm, was relevant when at a larger firm.
Lack of technology involved.
all dependent upon paper, and not able to be recreated if there was a fire or flood
Tend to do tasks myself which i could be handing off
I keep my own to do list and haven't set up staff to access on our network. I use Franklin covey and need to set up staff to be able to access.
Not applicable- solo practice with no staff.
I just assign work
It has been hard to keep track of all the tasks, and to follow up on a priority based system
hand written lists can be misplaced.
My real problem is lack of TIME ...time to look over what I can delegate and what I should keep, and how long it would take another vs. me to do the work.
Getting the right level of work to the appropriately (in)experienced attorney and paralegal.
control over status of matters, i.e. where each stands
I prioritize staff work before they are in, but then other things pop up during the day, files get shifted, priorities change and a week later I find something that was a medium priority and had not been touched. Not sure that answers the question...
I do not have sufficient revenue to support staff.
As a solo practitioner I prefer to manage delegation in case by case manner.
It's ME!!! Very haphazard when busy.
See number 2 above.
unwieldy, cumbersome, at times I forget what I was going to tell the staff person by the time I get to make a note to give to them.
They don't always look at the list.
I don't often initially look at the file with a view towards delegation. Generally wait until semi-crisis occurs.
Sole practitioner with single staff person -- she is a mind reader.

following up with staff to ensure work is completed properly
I am a solo practioner with no staff.
Could use technology more. Could delegate drafting of simple documents more.
I do everything. I need to hire an part-time secretary/paralegal and delegate the routine correspondence and other tasks. I am working on developing an employee manual for this employee. Having a form office procedure manual to fine tune would be better. Perhaps one could be shared with section members
sometimes too absorbed to think ahead about delegable tasks
Lack of follow through
I don't have any staff.
Needs to be manually updated which is time consuming
Rarely but sometimes will miss a complete by date
The follow through
Unschedduledinteruptions
I have no staff.
Staff is not educated

4) Please answer the below questions about your Elder Law Practice Management:

	Yes	No	Don't know
Does your firm make use of part-time employees?	54.6% (65)	45.4% (54)	0.0% (0)
Does your firm make use of per diem help	20.5% (24)	78.6% (92)	0.9% (1)
Does your firm make use of virtual assistants or other help that works exclusively outside your office?	10.3% (12)	88.9% (104)	0.9% (1)
Do you have a client membership/maintenance program where clients pay you an annual fee for providing ongoing legal services?	4.2% (5)	94.9% (112)	0.8% (1)

5) How much of your time do you spend on non-billable time (e.g. marketing and administrative duties)?

Response	Count	Percent
0% (none) of my time	4	3.4%
2-25% of my time	69	59.5%
26-50% of my time	38	32.8%
51-75% of my time	4	3.4%
76-100% of my time	1	0.9%

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6) What tips can you give about integrating a new attorney into an elder law practice?

What tips can you give about integrating a new attorney into an elder law practice?
mentor them and have them accompany you to meetings and drafting
learn from paralegals that have been doing it alot longer then the lawyers
Mentoring, having new attorney sit in on meetings and attend hearings, explain process from start to finish and provide examples, explain documents and procedures
It helps to hire law students so that you can gradually train them and test their skills before hiring as associates. I have asked new attorneys to attend seminars sponsored by Brookdale and NYSBA CLE.
I have found Hotdocs and Drafting Libraries helpful.
If you mean "new attorney" as newly admitted, I suggest spending a few months treating them as an admin assistant, then a few months as a paralegal, where they can hone their general office skills (phone answering, document compilation, learning the systems of the office), then letting them function at a paralegal level to learn the billable hour or tracking time for clients and the most basics. Trying to get a newly admitted attorney functioning takes TIME. If you mean an experienced attorney who is new to your practice or elder law, then I suggest outlining 3-5 critical tasks (drafting Irrev Trust; Medicaid application document review; etc.) and trying to assign that same task to that person within a 3-6 month period. Rather than allowing them to "sample" all the things you do, get them proficient in a handful and then branch out to other areas.
Make them join the elderlaw section, have them sit in on meetings, draft documents and letters and supervise them very closely. Nothing goes out without review by a senior attorney until you are sure they know what they are doing. In my experience in training attorneys in the elderlaw, estate planning, estate administration and tax law, attorneys need at least a year of intensive training and supervision before they are ready to meet with clients. Not cost effective, but very, very important. If the attorney makes slow or no progress, the best thing you can do is to fire them so they can find something else that suits them. Not everyone is cut out for this practice. Note that in 32 years I have trained 4 associates including my current law partner and my current of counsel and 9 legal assistants. I have mentored 6 more attorneys who wanted to add one of the above practice areas. Two are working in bank trust departments and 4 are in private practice,

still working in the areas in which I mentored them. I have also fired a dozen people who did not have the intellectual or personal skills to handle the demands of this type of practice, usually within a month of hiring them.
Include new attorneys in client meetings.
Necessary to have substantial volume of billable hours and a case referral source that feeds the 'senior' or 'owner / principal' attorney first.
Bring them into the workstream slowly. Assess their abilities and monitor closely till you are sure they know what they are doing. Emphasize detail and accuracy. Give them one case at a time. Proof all of their work
None
New attorneys would benefit from working with an experienced attorney when integrating, joining the listserve and attending CLEs in the area
hire slow, fire fast; train the basics, Medicaid, Guardianships, Attend some client conferences with a partner to learn who do interact and relate to Elder law clients
I think training the attorney is extremely important.
Use a mentor. Join the section and use the listserve.
Together with knowing the law & office practice, needs to be familiarized with working with "old people" & recognizing communication problems such as difficulty hearing.
None. I've moved to a shared office setting where I can obtain paralegal services from my landlord law firm's staff. To maintain confidentiality, I'm setting up my own PC for her, and I am NOT on the firm's network.
Assign him with an official mentor, and rotate to a new mentor if that relationship does not work out. In addition to the overall mentor, we also sometimes assign a "practice specific" mentor, whose job it is to bring the new attorney along in a specific part of the practice, eg, a "real estate mentor". We encourage new attorneys to sit in on client meetings and then the mentoring attorney can delegate appropriate types and amount of the work to the new attorney. The client meets the new attorney and knows she can call the new attorney, and often get a quicker response.
Give them much information about the nuances of Medicaid law - it takes time to learn.
Close supervision.
Have not hired a new attorney
The attorney can start by doing administrative tasks. Then drafting simple documents. The attorney can and should sit in and model the advice given by other attorneys during client meetings.
watch him carefully; it takes at least 3 years to learn this field well enough to practice at an acceptable level
Go to NYSBA seminars!! I hope to bring someone in w/ no experience in the area and I suggested he attend the 10/26 (I think) meeting.

None
get educated asap with CLE and get a mentor who knows what he/she is doing.
The importance of continuing study in the fields of trusts and estates, health law, tax issues, and related fields cannot be stressed enough.
I would guess a new attorney should have 5-7 years of general practice to get grounds in the various areas of law that constitutes "elder", including real estate, wills, trusts, estates, etc.
They really need to shadow an experienced atty for awhile and attend CLE's to get basics.
I'm a solo, so I can't.
Tough trying to put procedures/checklists in place so all persons can be intergrated by reviewing procedure/checklist
Don't wait to train them before giving them cases. Set up regular supervision schedule.
The best way is simply plenty of client meetings with me. There is no way to possibly teach all of the various permutations except through real life examples. The process takes a year or two.
Have him/her sit in on client consultations and document executions. have him/her review the raw forms and explain what the provisions are meant to accomplish.
I am now a solo practitioner & subject should be addressed by someone who has successfully integrated a new attorney into practice with comments also from new attorney. In my past (more than 3 decades ago) when I was a new attorney I found eplanation of "here is what we need to do and why" with "watch for this" to be helpful with follow up or offer of follow up to be helpful
read everything you can on the subject
create an intake of information form for the client to complete. Ask the client to give a summary of the intended goals, i.e. preserve theestate for the next generationn, reduce estate taxation, etc. Establish whether to charge a per hour fee structure or a fixed fee with the idea that a change in the goal mightincrease the stated fee. Havea signed retainer letter.
Try to associate with an experienced elder law attorney who can give practical advice. Invest in good form software and technical equipment (computers, printers, etc).
Attend CLEs; join the bars; get active in committees
Have sample forms. Have them sit in on initial interview. Have them go to Court to observe an Art 81 Hearing.

7) Please recommend Practice Management topics you would like the committee to address?

Please recommend Practice Management topics you would like the committee to address?
delegating to staff, prioritizing tasks, time management, billing practices, retainer agreements; enhancing productivity; incentives to enhance performance by staff

More focus on solo atty efficiencies.
Compensation structure for staff and associates; more information from the attorneys that did the practice management panel in Vermont on how they encourage productivity from staff and how they reward staff for productivity.
Evaluations of systems and technologies for smaller practices, 1-5 people including attorneys and staff, would be helpful. Ideally this would include evaluations of lower cost technologies and options. I have not paid more than $500 per year for any piece of technology or software in my office in the last 10 years, except for the multiple license HotDocs packages for Surrogate's Court and Real Estate which we share with our counsel. I find most of these on my own.
Hiring, training, avoiding/liliting employees downloading the form bank
Keeping Employees motivated
1. Transitioning to retirement 2. Comparison of software programs 3. Is drafting software worth the money and can we do a better job ourselves of creating forms
[1] document generation, [2] file management: outlining asks, timelines, responsible personnel
Practice management software & how to best use it.
I need advice and references to good resources to learn about Of Counsel arrangements...I would like to spend my time really practicing law instead of administering my solo practice of 20 years.
The recent "paperless" office section was very good; so was the recent roundtable on retainer agreements and successful practice tips. We are struggling now on how to charge more for the estate planning because fewer estates will need probate as time goes on and there are more beneficiary designations.
Effective delegation techniques.
retirement policies
How to get laypersons to pay court-ordered fees
practice mgt software, methods of follow up with prior clients to notify of changes, etc.
Computer management programs
Having a helpful list of direct telephone numbers and contact persons in key agencies (such as DSS and SSA) with whom elder law attorneys regularly interact would be very useful. It is quite frustrating to have to rely upon a general info line in order to speak to someone with the ability to help assist a client. Some guidance in this area would be appreciated, I think.
How to retire gracefully and with best economic benefit
1. Staff incentives - especially those geared to rewarding specific desirable behaviors, rather than results for which staff member may not be directly responsible. 2. Business Metrics - not only those telling us what we've done, but also those which may be leading indicators of what will be
Management of file, document management, keeping client apprised of status, status of communications w/ Medicaid agency during medicaid application process - from inception to client receiving medicaid benefits
Billing systems

Cost effective and reliable case management software for a small elder law practitioner. I am currently adopting a plaintiff's PI case management system (LexPI) to my needs. There may be something that works better. How to automate forms. Is Hotdocs the way to go? Is there something that is better?
Forming new habits e.g., remembering to capture billable time.
Effective use of practice management software.
file maintenance
Retiring
Software programs. Best for the dollar.
Techniques for sole practitioners. Reasonably priced resources such as form software, billing programs, etc.
Annual and Final Accounts.

8) Which program do you use for client billing?

Response	**Count**	**Percent**
Timeslips	33	28.0%
PC Law	12	10.2%
Billing Matters	8	6.8%
None, we practice flat fee billing	23	19.5%
Other (please specify)	42	35.6%

Other Responses:

Juris
About time
Quickbooks
Juris
Mixture of flat fee and hourly billing depending on task with invoices managed through custom Excel spreadsheet
Elite Webview
daily diary
TABS
Internally generated bills

carpe diem
just an internally created program
flat fee and time slips
TABS3
Clio
Amicus Attorney
I do my billing manually.
Rippe
By hand
don't know the software
our own time sheets on excel, then type a cover bill to go with the timesheetoe
clio
Most of my fees are pursuant to court order. I track my time using an Excel spreadsheet, and I cut and paste into an aff of services.
Dictate the bill to clients
Excel
a system of macros and merge documents in my word processor
AIM/Perfect Law
Quick books
I create my own invoices.
Rocketmatter.net
Manual billing
Non-profit; we do not bill clients
We have our own time keeping methods.
most of my cases are done on flat fee basis
Office prepared billing
we send individual records
Chaos intellect
Manual time slips
and fixed fee, depending on thenatureofthe engagement
And have own system I am building
I have a very small one-person practice, and hand draft my bills on the computer.

Amicus
manually track hours
We NEVER automate billing. It is always "personal".

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9) Which program do you use for client billing that you can recommend?

Response	Count	Percent
Timeslips	26	31.0%
PC Law	11	13.1%
Billing Matters	6	7.1%
None, we practice flat fee billing	22	26.2%
Other (please specify)	19	22.6%

Other Responses:

Nothing seems to work as well for our 2 person practice as a set of custom spreadsheets and time set aside monthly for billing and followup including a monthly partner's billling conference
Elite Webview
TABS
TABS3
Clio
Amicus Attorney
Billing Matters use could be a topic (Item 7 above)
I want to figure out flat fee billing...
Rippe
Juris
Not applicable
N/A
AIM/Perfect Law
Quickbooks
Rocketmatter.net
Want to switch

See above
Own Office bookkeeper
Chaos Intellect
See above.
Not real happy with Timeslips
Amicus

10) Please indicate below how you take care of your office's document scanning:

Response	Count	Percent
We scan all or most of the documents in our office.	37	32.2%
We scan some documents in our office.	63	54.8%
We do not do any scanning, but do own a scanner.	7	6.1%
We do not do any scanning but use a service provider to do the scanning.	0	0.0%
We do not do any scanning.	8	7.0%

11) What technology has had the most impact on your practice?

Response	Count	Percent
Scanning	35	31.8%
HotDocs or other document assembly programs	39	35.5%
Voice recognition software	1	0.9%
Remote computer accessing (i.e. pcAnywhere or LogMeIn.com)	17	15.5%
Smartphones	8	7.3%
Tablets (like the iPad)	0	0.0%
Other (please specify)	10	9.1%

Other Responses:

email with attachments
I use Gotomypc.com by Citrix; are the ones you mentioned better?
Time Matters (client management software)

I am an early adopter. We use document assembly, remote file sharing, smartphones and scanning to run our practice as seamlessly as possible from our offices, our clients' homes and offices and our home offices
Scanning and HotDocs have had impact
Email
The drafting library DL is a large factor
Until now, smartphones, but I think scanning will surpass them.
Case Management System
All of the above
Email
e-mail
Swithching to Macs and Word
Salesforce.com
We have none of the above.
none
Amicus Attorney database system, a godsend

12) How often do you review your business emails?

Response	Count	Percent
Less than once a day	1	0.9%
Once a day	6	5.1%
Two to Three times a day	32	27.4%
More than four times a day	57	48.7%
I review each email as they come into my inbox	21	17.9%

13) Do you have a system in place to manage staying on top of emails?

Response	Count	Percent
Yes	31	26.7%
No	48	41.4%

Sort of	37	31.9%

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14) If you do have a system in place to manage staying on top of emails, please describe your system:

If you do have a system in place to manage staying on top of emails, please describe your system:
blackberry and desk top
All emails of any import are immediately saved to the server in the client's directory. All mail that cannot be addressed immediately is placed in a local "Follow Up" folder. The inbox is always to be empty, so that all mail is either replied to, or marked for follow up. Additionally, all outgoing emails are bcc'ed to staff for saving to the server.
I direct listserves to separate folders. I have numerous folders for emails that I choose to save.
Outlook 2010
I keep unread those yet to be done; I also save some emails to client's computer file.
List Serv emails get automatically directed to separate folder, as to all newsletters that we receive on a regular basis (these are reviewed only each morning unless there is a hot topic on the list serv I'm monitoring); I immediately sort personal emails out to another folder; I attached all client emails to Time Matters immediately and leave only those that emails that need action in my inbox.
All emails are responded to within 24 hours. All client files are saved to a folder in Outlook and converted to a pdf at the close of a matter
high spam fliter
I review emails several times a day; I utilized reminder flags; I have subfolders for each matter
Microsoft Outlook, with rules sending all went to individual client folders, & monitoring top level folders (Inbox for those not yet classified, and items received / changed in last 7 days) - Works well for me as a solo.
rules to segregate various listserves, spam, etc.
Answering client emails once a day, at the begining of each day.
attorney checks e-mail after each task is completed
I open and review email a few hours after I arrive at work, again around 3pm, and then before I leave work
In Outlook I created a folder in which I drag emails that need to have immediate responses.
Multiple daily reviews. Copy and keep in file and delete or simply delete as appropriate.
i divide them into separate folders for particular clients, or subject matter

The day it arrives, each CLIENT email gets reviewed, answered in most cases, then transferred to his or her Time Matters file
Outlook is configured with many subfolders of personal mail. I focus on the client emails first daily. I answer those requiring immediate responses and diary in Amicus Attorney the ones to answer later in the week. I try to at least acknowledge receipt of the client emails. The rest I read on the server off hours.
try to live by Inbox Zero - see Merlin Mann
Review them in the office and link them to cases in TimeMatters. Review and Sort them again at home.
I read them regularly as this is how people communicate these days
check email at least 2x per day before lunch and before we go home at night
my screen is on my left and on while I am here
If the email is something that requires an immediate response and can be responded to within a matter of minutes, I immediately respond to the email. If the email is urgent, but cannot be responded to within a matter of minutes, I flag the email using my Mac Mail client. I then set aside one hour at the end of the day to respond to all flagged emails for that day, in order of urgency. Any flagged emails that I am not able to respond to by the end of the day, I handle the next morning at the beginning of the day.
I have my emails set up to pop up on my screen as they arrive.
Items delegated are forwarded. Information items are stored in client's computer file. Items for reference in drafting are printed.
i delete the garbage immediatly and move the client related emails into a separate folder for the client as soon as it is taken care of
I check it on average 2-3 times per day. My staff checks it also once a day.
In Gmail emails are sorted to matter folders once read. Important emails are starred to attention
It's self-imposed. I really stay on top of the emails all day long, and clear out old, unwanted emails no more than every 2 days.
Rules to route listserv and mailing list messages into separate folders (pro: they don't clog inbox. con: I never read them). Flagging important messages to follow up on.
emails seen as they come into inbox & noted then they are reviewed each working day & saved to Time Matters program file for Matter they pertain to. They are sent for others to review if necessary.
they don't go out of the inbox till they are taken care of
Iallow emails to accummulate and then read and save or delte as I read each one.
I look at my e-mail regularly.
Immediate response to client and attorney emails.
We avoid client contact by email for many reasons, but we will communicate with attorneys and

financial institutions, etc.

15) Please recommend Technology topics you would like the committee to address?

Please recommend Technology topics you would like the committee to address?
Storage and scanning
practice management software, drafting software.
Recommendations as to tech hardware & software, e.g., which remote computer accessing programs are best.
See above under Practice MAnagement
using excel for accountings
For my Elder & T&E practice, want to identify good document assembly system that allows me to manage & modify clauses to docyuments. Also need a methodology &/or program to handle scanning docs in-house and effeciently filing / classifying them.
Security of Remote Access. Tracking files through the office, i.e. workflow
how to fix problems with list-serve (I have not been getting elder law list serve messages for about a month, and can't figure out why)
Social netwroking
See above
Best use of software & equipment such as Time & Billing Matters, LexisNexis, Hotdocs. Best use of Computer hardware could also be discussed.
Confession - I purchased Dragon Naturally Speaking in 2009 and NEVER used it. Too busy to even learn it. Tell me if it's worth it to upgrade it and learn it.
How to make better use of time matters
use of iPad for lawyers
the latest developments in #11
cloud computing, Skype to Skype video conferencing, designing effective presentations for clients or other professionals on devices such as an iPad.
Digital filing heirarchy systems design
The most persistent problem is all the elctronics in the world won't make communicating with an 85 year old client with no computer and is hard of hearing. Topic- making our communications understandable to our clients.
How various programs work in our practice for: billing, voice recognition, & remote access. I've heard of and read some about these categories of programs, but have never seen a seminar offered to describe each of these and how they would work in a law practice, much less an elder

law practice
Billing systems
advantages of iPads aside from portability
I wish I could hear someone explain Billing Matters so we could efficiently use the program.
cloud computing access files remotely
scanning and the preservation of closed files--to scan by a paralegal or non-professional part time personnel. Also, the scanning of new files.
Reasonably priced software for sole practitioners.
Annual and Final Acounitngs

16) Number of attorneys in your office/organization:

Response	Count	Percent
01 (Solo)	62	52.5%
02-05	37	31.4%
06-09	6	5.1%
10-19	5	4.2%
20-49	5	4.2%
50-99	2	1.7%
100+	1	0.8%

17) When do you plan on retiring?

Response	Count	Percent
Before age 60	2	1.7%
Between ages 61-65	7	5.9%
Between ages 66-70	33	28.0%
Between ages 71-75	21	17.8%
Never	17	14.4%
Unknown	38	32.2%