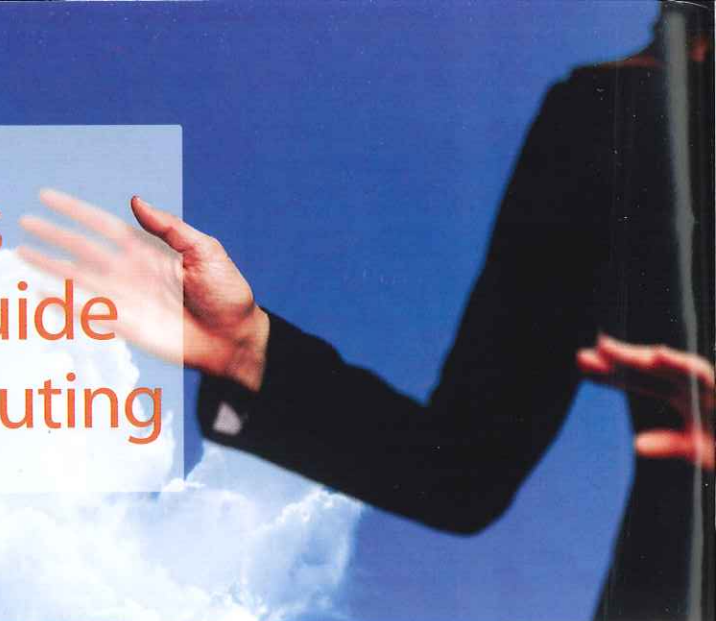




# The Paralegal's Get Started Guide to Cloud Computing



By Dawn Witzke

As cloud services grow in popularity, it is up to paralegals in small firms to know and understand how these services fit into the practice of law and the process for getting them set up. It's also important to be knowledgeable of the current ethical guidelines and procedures for using cloud services.

## Privacy

Privacy is the biggest concern for law firms when considering cloud services. Law firms have an ethical duty to keep their client's information confidential. When it comes to working in the cloud, privacy of that information is dependent on the security of hardware, quality of software, confidentiality of passwords and reliability of cloud service providers. Law firms should have policies in place to ensure that the best practices for protecting client information are used and are routinely reviewed.

## Mobility

By far the greatest feature of working in the cloud is mobility. Firms that use one of the cloud-based practice management programs, such as Clio or RocketMatter, have the complete case file, including copies of documents, available anywhere there is an internet connection. Billing entries can be done on the spot rather than waiting to get back to the office and it eliminates logging into the firm's network when working from home.

## Monetary

Another popular feature of cloud-based software is the low upfront cost to get set up. Cloud-based software has monthly or annual fees that make it easy to budget technology costs. There is also no need to upgrade software when new versions come out. The company automatically does that on an ongoing basis. In the long run, however, costs for an in-house system versus cloud systems are relatively similar depending on your setup and needs.

## Ethics Guidelines

The American Bar Association and some states provide guidelines for law firms working with cloud-based services. The prevailing standard for use of online services is reasonable care. As usual, reasonable care means something different in every state. In Massachusetts, reasonable care involves getting a client's permission to put their information in the cloud. In Iowa, it involves ensuring unfettered access to the data. For state specific guidelines, a round up of state bar association opinions is available on the ABA's website at <http://goo.gl/NsEg6O>.

## Getting Started

There are a few steps every law firm should go through before jumping online. Adriana Linares, a technology consultant at Law Tech Partners in Winter Park, FL, recommends firms start with a plan. First, the firm's current setup and practices need to be evaluated. Then, they need to look at what problem they want to solve and develop a goal. Finally, the firm should ID which products will meet the goal and be the best fit for them. She also recommends that firms have mobile device and password policies in place. These policies will help stop problems before they happen.

## Hardware

Older computers and software leave openings for security breaches. The goal the firm developed will help determine what type of hardware a firm needs to purchase. Tablets may do little good if they are frequently used in places where Wi-Fi is not available. Without an internet connection, the cloud and the firm's data can't be accessed. Smart phones, on the other hand, may have internet access, but the small screen may make viewing the documents difficult.

## Internet Connection

A reliable internet connection is a must when working in the cloud. As a security measure, a backup provider is recommended. It can be the cheapest, slowest provider out there, but it will keep the office up and running if the primary service goes down. If the primary service goes down regularly, it might be time to switch to a more reliable service.

## Vetting Software Providers

This is the most important aspect of moving to cloud-based software. Once everything else is setup, it's time to start looking at the

services available. There are hundreds of cloud service providers, each offering different services and terms of service. First and foremost, read the terms of service for every provider you evaluate. The terms of service set out the rights and responsibilities of both parties during the term of use. Some terms of service give detailed procedures for terminating the relationship, as well as how to download or transfer the data stored by the company. Issues regarding privacy of the information, who owns the data stored, and procedures regarding disputes may also be included.

Heidi Alexander, a Law Practice Advisor for the Massachusetts Law Office Management Assistance Program in Boston, MA, advises that when vetting cloud service providers, there are five important factors to consider.

1) Are they reputable? Have they been in business long? Do other law firms recommend them?

2) Do they encrypt their data? Encryption adds another layer of security to the data so if a breach would happen,

## Privacy is the biggest concern for law firms when considering cloud services.

the information is unreadable to anyone without the encryption code.

3) Have they had major security breaches in the past? How long ago was the breach and what have they done since then to fix the problem?

4) What are their backup procedures?

5) Where is the data being stored? Is it in the United States where there are added safeguards for the client in case of a breach or internationally where these safeguards may not exist?

Less critical things to consider are:

**The ease of use.** Some cloud-based programs have a higher learning curve than others. Are the benefits of the program worth the time lost to learn the software?

**Cost of software.** Is the program worth the expense? Does it make the firm money or does it cost the firm money?

### The Future of Cloud Software in Law Offices

Adriana Linares predicts that cloud-based offices are the future. It may take several years to get there, but eventually all small offices will be working in the cloud. She also sees client portals replacing email. Client portals provide a greater degree of security while giving clients more access to their case documents and information. □

*Dawn Witzke, CP, is a freelance legal and business writer from Sioux City, Iowa, working to drag attorneys into the mobile age. For more information, check her out on LinkedIn or on her website at <http://dawnwitzke.com>. Stay tuned for Dawn's next article on the use of Cloud computing in the law firm.*



**2015**

**WELCOME TO Fabulous LAS VEGAS NEVADA**

**LAS VEGAS**  
NALS...THE ASSOCIATION FOR LEGAL PROFESSIONALS  
64TH ANNUAL EDUCATION CONFERENCE & NATIONAL FORUM  
OCTOBER 8-10, 2015 | RIVIERA CASINO & HOTEL  
[WWW.NALS.ORG/CONFERENCES](http://WWW.NALS.ORG/CONFERENCES)