

# STAR Watch

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## Battling the Paper Beast: Handling Less Paper

In case you don't know what it is, the "Fax Machine Shuffle" is the little dance that people do when they are forced to stand at the fax machine and watch for paper jams and other problems as a large volume of paper documents are being faxed. As the time it takes to fax documents increases, the person standing by begins to shift his/her weight from one foot to the other until the fax is successfully received by the party on the other end of the phone line.

The dance starts slowly, almost imperceptibly and the amount of movement increases over the period of time it takes to complete the fax. Some more experienced dancers even include the occasional heavy sigh or quiet mumbling complaint as time goes on.

Normally, the entire dance is rather subdued and uninteresting to observe. However, when the faxing process terminates prematurely due to some sort of an error, the dance may end with wild emotional gestures and a series of colorful expressions of frustration.

Our paralegals don't do the "Fax Machine Shuffle" any more. Nobody in our office does. It wastes too much valuable staff time.

We didn't eliminate the faxing of documents –

That would be impossible. We eliminated the faxing of paper documents. But in order to do that, we were forced to re-think how we handle all case-related paper documents. We started on this project over a year ago and we are far from done, but it is now clear to everyone here that dealing with paper documents is a time-waster. The key to increased productivity is avoiding the handling of paper: Electronic document files provide greater opportunities for efficiency in case handling.

### What did we do?

We took care of the simple things first:

1. Everyone was provided with a folder of their very own on the network in which they can store documents that they are working on.



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2. The configurations of all user applications (Word, Excel, etc.) were changed to store all saved files in the user's folder on the network. Nothing is stored on the user's workstation unless the user takes the extra effort to place it there.
3. We created a specific location on the network for all case-related documents and files. Every case has a folder whose name contains the case number and last/first name of the client. Within that folder are sub-folders. The number/names of subfolders are dependent on the type of case. Each of the practice groups were allowed to formulate their own subfolder structure.
4. The network printer/copier/scanner was swapped for a model that had a fax board in it. From that point forward, any document that could be sent to the printer could be faxed.
5. We configured the fax functionality to save a copy of the incoming fax as a PDF in a specific folder on the network before printing it out. This eliminated the need to scan the fax to create an electronic file.
6. For document scanning, every staff member was given two possible destinations for the output PDF file: The scanner could send the PDF to his/her email address or store the PDF in a folder on the network.
7. We provided each paralegal with a copy of Adobe Acrobat Standard. This program is used to create and manipulate PDFs.
8. We installed the latest version of TIME Case Management System that can link documents stored on the network to cases in the case management system.

The physical pieces of the puzzle are in place. Now it is time to work through the

new procedures for handling documents.

#### **New cases**

As part of the intake process, the paralegal assigned to the case is responsible for entering the client's information into the TIME case management system and creating the case folder for the case (#3 above). Any documents provided by the client are scanned in (#6 above) and then moved to the case folder on the network. Through the TIME case management system (#8 above), the scanned documents are linked to the case.

#### **Incoming faxes**

As we stated previously, before printing out, a copy of the incoming fax (in PDF format) is stored in a folder on the network (#5 above) before printing out. Paralegals copy the PDFs to the appropriate subfolder of the case on the network (#3 above). If the incoming fax PDF contains a lot of information, advocates may use Adobe Acrobat (#7 above) to break it into separate files, depending on content. Then, through the TIME case management system (#8 above), link the PDF(s) to the case.

#### **Additional documents**

Paper documents come to our office by several means. Some are delivered by U.S. Mail, UPS, or FedEx. Other times, clients provide us with documents relating to their case. Regardless of how the documents arrived, the procedure is the same. They are immediately scanned into PDF files (#6 above), then stored with the other case information on the network (#3 above). Internally, all documents created by advocates are also stored with the case. The TIME case management system (#8 above) is used to link these documents to the case.

#### **Outgoing paper documents**

There is no avoiding it: Some things must be printed. Since all documents related to a case are physically stored in a known location and



linked to the case through the case management system, they are easily located. We have placed no restrictions on printing.

**Outgoing faxes**

As we discussed earlier, every document related to the case is stored in the case folder on the network. Our advocates use Adobe Acrobat to build the file that will be faxed:

- After starting up Adobe Acrobat, the advocate selects **Create PDF > From Multiple Files...** This option allows a user to build a single large PDF from any number of smaller PDF files. The user can control the order that information appears in the PDF.
- We have created small PDFs that we use as cover sheets or dividers that help to make the information in the PDF more understandable by the person(s) receiving it.
- Many institutions that we deal with require that every page must have specific information, usually loan number, on it or they will not process the information in the fax. With Adobe Acrobat, it is not a problem. If the document to be faxed was paper, the advocate would be forced to write the required information on every piece of paper -- In the location specified (ugh). Now, it is much easier. To put the information on all of the pages of the document, go to **Document > Add Watermark & Background...** Enter the required information once and specify the location on the document where it is to appear. When the PDF is created, Adobe Acrobat will place the information on all of the pages.



- To send the fax, the advocate opens the PDF created in the previous step, selects "Print", then chooses the fax board as the "printer", clicks the "Print" button, then enters the telephone number of the destination fax machine. Since an electronic file is being transmitted, the number of pages transmitted is not limited by the size of the paper hopper (usually about 50 pages). The advocate does not need to monitor the process since there is no possibility of paper jams. Our fax system sends the information to the destination site and prints a transmission report when the fax job ends. While the fax is being transmitted, the operator is free to perform useful work instead of babysitting the fax machine.

**Outgoing emails**

Except for the very last step, creating a document to email is the same as the process for outgoing faxes. At the end of the process, the document created is simply attached to an email. A word of caution, though: While few organizations restrict the size of fax transmissions, most will impose size restrictions on email attachments. If the attachment is greater than 1 Megabyte, check with the receiving party to determine if it exceeds the limits on mailbox to which it is being sent.

**Costs and Benefits**

We had a 5-year-old Konica-Minolta c350 that had served us well, but could not be upgraded due to a lack of available parts and, the number of pages printed by the machine exceeded 500,000. It was getting tired. We replaced this machine with a newer, recently off-lease model with a low



page count (less than 15,000), the same speed, same features, same cost of maintenance – and a fax board. The total cost to us was about \$2,500. That was our only cash expense.

With regard to disk space requirements for storing cases, the average amount of space required by a case is 13.5 Megabytes, or approximately 75 cases per Gigabyte of space. If space used by closed cases becomes excessive, the files could be copied to DVDs and then deleted from the network. A single DVD can hold all of the documents for approximately 350 cases. If the case needs to be reopened, the files could be copied back to the network.

After installing the new printer driver and fax board driver on the advocates' workstations, we disconnected the old fax machine and stored it away. Every staff member was now able to fax existing documents without leaving his/her desk. If the machine was busy handling another fax, it would store the current fax until the telephone line used by the fax became available. It may only take a minute or two to walk to/from the fax machine, but it all adds up. If an advocate needed to fax multiple documents, the non-productive time added up.

We do a lot of foreclosure prevention work and that involves the preparation of loan modification requests. The documentation required by the loan servicers is detailed and lengthy. It is not unusual for the documentation package submitted to exceed 100 pages. Previously, when these documentation packages were being assembled and faxed, it would take approximately three hours of a paralegal's time to complete the process of



(1) Locating the physical case folder (2) Pulling the required documents from the case folder (3) Assembling the documents into some reasonable order (4) Writing the loan number and mortgagee name to every page of paper. How hard can it be to write 8 –10 (or more) digits on a piece of paper? On one page of paper, it doesn't take long at all. But if there are 75, 100, or more pages, it takes a while – not counting time-outs for hand cramps. (5) Babysitting the fax machine as it sent those pages one-by-one.

Now, the steps in the process have either been eliminated or the time required has been virtually eliminated because (1) It is not necessary to have the physical case folder. Every document is stored in electronic form on the network and retrievable through our case management system. (2) The arrangement of folders/files on the network and the list of documents in TIME case management system makes it easy to find everything required. (3) Adobe Acrobat makes it simple to assemble multiple files/documents into a single submission package.

(4) Adobe Acrobat places the loan servicer-required information on every page through use of the "watermark" feature. (5) By faxing the single electronic file, there are no pages to jam or "piggyback", negating the need to stand at the fax machine while it is transmitting. So, what are the savings?

Under the previous system, it would take an advocate about three hours to prepare and send out a loan modification application. Now, the whole process, start to finish can be completed in one hour -- or less.

Given that our paralegals were usually submitting 4 loan application packages per



week, the time savings per week is 8 hours. That is 8 hours available to perform additional tasks. It is like getting an extra day's work out of every paralegal.

We have also been able to reduce the storage and handling of closed cases. All of the documents found in the physical case file exist in electronic form on the network. When the documents in the physical case file are reviewed at closing, we only retain the documents containing original signatures. The rest of the documents are either returned to the client or placed with other documents to be shredded. The physical documents to be retained fit easily in a single manila folder. Because of the reduction in the size of files to be stored, we are able to fit approximately 400 closed files into a single "Banker Box". Our space requirements for storage of closed case files has plummeted. And there was another unexpected benefit.

Since our cases end up with hundreds of pages of documents, we use 5-inch expandable file pockets to store all of the paper. Within the expandable file pocket, the documents are housed in separate 1/3 cut folders. In the past, the file pocket and the 1/3 cut folders went into storage for 3, 5, 7, or 10 years. When the destroy date was reached, everything was shredded because it was too big a task to cull out the expandable pockets and 1/3 cut folders. Now, it is different.

The expandable pockets and 1/3 cut folders are saved for re-use. The cost savings has been significant: At \$5 - \$6 per expandable pocket and \$1 - \$2 for the file folders, we have recovered \$3,000 to \$4,000 in office supplies for reuse.

And finally, as cases are shifted from one attorney to another to balance caseloads, the new attorney does not waste time

guessing about where specific documents are located. The rules for document storage within a practice group are known and understood by everyone in the group.

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It all started a little over a year ago with a complaint about time being wasted when documents were being faxed. From that incident, with the enthusiastic cooperation of our lawyers and paralegals, we have been able to increase our case handling efficiency by finding ways to reduce or eliminate non-productive tasks involving paper documents.

Are we done yet? Hardly. We would like to reduce the amount of paper that is still printed. The good news is our paper usage has definitely not gone up, but to date, there has been no significant reduction in printed pages. We have not pushed the issue of printing fewer documents since it was felt that staff needs time to adjust their thinking from "document = paper" to "document = electronic file". We are just about there.

On the other hand, we have reduced the time used by staff to handle paper. Based on our calculations, if each of our staff members could save one hour of his/her time per month, the value of the personnel time savings would be worth more than the total cost of paper and printing for that period. We have already exceeded that goal.







## WNYLC Web Statistics For March 2012

Total Hits.....1,635,565  
 Number of Pages Viewed.....397,167  
 Total Visitors.....99,069  
 Average Hits/Day.....52,760  
 Average Pages /Day.....12,811  
 Top Web Browsers Used:  
 Internet Explorer 9.x.....13%  
 Internet Explorer 8.x.....24%  
 Internet Explorer 7.x.....13%  
 Internet Explorer 6.x.....3%  
 Firefox.....15%  
 Google Chrome.....7%

Top Operating Systems Used:  
 Windows 7.....28%  
 Windows Vista.....9%  
 Windows XP.....32%  
 Mac OS.....4%  
 Linux.....<1%  
 iPad.....1%



### WHO WE ARE

- Joe Kelemen - Attorney
- Lauren Breen - Attorney
- Keisha Williams - Attorney
- Danielle Mayer-Dorociak - Attorney
- Amy Kaslovsky - Attorney
- Nicole Talev - Attorney
- Vera Cedano - Attorney
- Dan Kresse - Paralegal
- Kate Timm - Paralegal
- Tom Karkau - Programmer
- Sherry Soules - Administrator
- Joy McDuffie - Data Analyst



Wnylc@wnylc.com



716-855-0203



www.wnylc.net

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