



MASSBAR

A S S O C I A T I O N

A LAW FIRM GUIDE TO NAVIGATING COVID-19

*Compiled with Assistance from the State Bar of Michigan,
North Carolina Bar Association Center for Practice Management and
Massachusetts Law Office Management Assistance Program*

Part 1: Awareness, Response and Workplace Plans/Policies

Law firms should monitor the current outbreak of COVID-19, a viral respiratory illness that has been spreading throughout the globe. Many law firms may have a disaster recovery or a business continuity plan, which should be reviewed and updated to reflect the [pandemic response](#). Procedures necessitated by efforts to practice social isolation or possible quarantine include how all or several members of the firm will work remotely and maintain business continuity. The situation with this virus is fluid and should be closely monitored so that law firms can take care of their teams and continue to serve their clients.

Stay Aware

- [COVID-19 Surveillance Dashboard](#) (global tracking from University of Virginia)
- [COVID-19 Global Case Database](#) (global tracking from Johns Hopkins)
- [COVID-19/Coronavirus Real-Time Updates With Credible Sources in U.S. and Canada | 1Point3Acres](#) (Live Virus Tracking in the U.S. and Canada)
- [New York Times Coronavirus Outbreak](#)

Global Response

- [World Health Organization Portal](#)
- [CDC Travel Notices](#)

Covid-19 Legal Implications for the Firm and Clients

- [On the Various Ways the Coronavirus May Impact Operations and Employees](#) (Skadden)
- [Cybersecurity, Common Sense and COVID-19](#) (Holland and Knight)
- [Coronavirus Risks – U.S. and European Employment and Privacy Law Issues](#) (Sidley)
- [COVID-19 Client Alert Series: Data Protection Issues](#) (Paul Hastings)

General Business Planning

- [Massachusetts Paid Family & Medical Need Information for Employers](#)
- [Mass LOMAP – COVID-19: Pandemic + Remote Work Resources for Lawyers](#)
- [Massachusetts Department of Unemployment Assistance](#)
- [Employer Coronavirus Crisis Management Planning](#) (*National Law Review*)
- [Interim Guidance for Businesses and Employers to Plan and Respond to Coronavirus Disease 2019 \(COVID-19\), February 2020 \(CDC\)](#)
- [As Coronavirus Spreads, Legal Industry Shifts into Crisis Management Mode](#) (Law.com)

- [Coronavirus' Business Impact: Evolving Perspective](#) (McKinsey)
- [COVID-19 FAQs](#) (Ropes & Gray)

Law Firm Policies/Plans to Review and Update

Law firms should review the following plans and policies and update them to reflect possible quarantine situations, protect infected employees, reduce the spread of the virus and develop strategies for dealing with a swiftly evolving situation. Flexibility is key as the situation changes. Being prepared is the goal.

Policies

Firms should review and update the following policies: Sick/Paid Leave, Work Hours, Remote Access/Work from Home, Internet Use Policy and the Security Policy. It is important to stress that sick employees should feel comfortable calling in sick and not coming in to work, to avoid potentially infecting more people. Let them know how to reduce the spread of the virus through sanitizing, what measures the office is taking to keep staff and clients safe, and what the firm plans to do in the event of community quarantine, containment or socially responsible isolation. If you have employer-issued health care plans, let your team know who to contact with questions about coverage.

If you have an existing remote work policy or are quickly writing one, keep in mind that restrictions regarding “distractions” like children or caregiving responsibilities may be appropriate for regular policies, but in the event of a quarantine, containment zone or shelter in place, employees will have little choice. Additional policy rules requiring a specific area to do work from, such as a home office, may also need to be waived if the firm is reacting as part of a business continuity plan that includes a pandemic response.

Sample Law Firm Policies

- [Office Procedures Manual](#) (Lawyers Mutual)
- [Law Office Policy & Procedures Manual](#) (American Bar Association)
- [Growing a Law Firm: Creating an Employee Handbook](#) (Findlaw)
- [Cyber Security Policy Template for Law Firms and Legal Professionals](#) (Legal Computer Consultants)
- [Remote Access Policy](#) (SANS)
- [Remote Access Policy Template](#) (Focal Point)

Some policies have legal implications. Contact a labor and employment lawyer or privacy and data security lawyer if you need help with compliant policy language.

- [What You Should Know About the ADA, the Rehabilitation Act and the Coronavirus](#) (EEOC)
- [Family and Medical Leave](#) (FMLA)
- [Safety and Health Topics | Pandemic Influenza](#) (OSHA)
- [Pandemic Preparedness in the Workplace and the Americans with Disabilities Act](#) (EEOC)
- [MCAD Guidelines: Employment Discrimination on the Basis of Handicap](#)

Business Plans

Law firms should have a business continuity plan in place. The firm’s plan should identify potential business disruptions and how to mitigate them. A good plan will have a workflow and response decision tree so that the firm can quickly assess when and how to act. Review your existing plan, update as necessary and test your plan. In the face of a pandemic, firms should also check their succession plans.

Sample Business Continuity and Succession Plans

- [Planning Ahead: Protecting Your Clients' Interests in the Event of Your Disability or Death](#) (State Bar of Michigan)
- [Succession Planning](#) (Arizona Bar)
- [Contingency Planning for Lawyers](#) (Practice Pro)
- [Managing Practice Interruptions](#) (Includes a business continuity worksheet in Excel format) (Practice Pro)
- [Business Continuity Worksheet](#) (NCBA ST&MP Conference 2019)
- [Disaster Planning and Recovery](#) (NC Lawyers Mutual)
- [Does Your Law Firm Disaster Plan Include a Pandemic?](#) (NCBA Small Firm & Technology Section)
- [ABA Resources on Succession Planning](#)
- [LOMAP Resources on Succession Planning](#)

PART 2: LAW FIRM OPERATIONS

As the COVID-19 virus spreads, many companies have decided to ask that their employees work from home. Many law firms already have many of the elements in place to be able to dispatch the team to work from home. Following are some considerations and guidance on temporarily moving your firm to a “virtual” environment.

If your firm has IT managed services, an outside IT consultant or IT staff, please consult with them to understand your options to move your firm to remote work as securely and swiftly as possible.

Remember to use what you have and buy only what you absolutely need. Many software applications have freemium (free for basic use) offers, as well as free trials. Before getting a free product, check the terms of service to make sure it is appropriate for confidential client information.

MBA members have access to a variety of resources for [discounts](#) on purchasing services and discounted technology.

Hardware/Peripherals

Computers

In a remote work situation, all personnel will need to take home their laptops. However, while some of the lawyers in the firm may have laptops, many on the support team may be using workstations. If possible, it is better from a security perspective not to ask employees to use their home computers to do remote work for the firm (assuming they have home computers). If the firm can purchase and deploy laptops to everyone in the firm, that is the best approach. While it is best to buy business-ready machines from the manufacturer (like Lenovo or Dell for small business), firms needing to purchase in bulk may consider buying refurbished laptops from places like [TigerDirect](#), Amazon or [NewEgg](#). Avoid Chromebooks, which can be problematic for running some business applications.

If purchasing new hardware is not an option, one possibility is that team members with desktop computers pack them up and take them home — remembering to take the necessary cables and peripherals like a mouse, keyboard and monitor. If the desktop computer does not have Wi-Fi capabilities and the team member does not have ethernet capabilities (corded internet) at home, a [Wi-Fi adapter can be purchased](#).

If the firm chooses to ask staff to use their home equipment, they will need to deploy a VPN (virtual private network) at the least and turn on multi-factor authentication. More about these below.

Voice/Telephony

For law firms using a VoIP telephone system like RingCentral, Ooma, Jive, or others, the system can be set up to be used remotely through apps on mobile phones, through a computer browser, or have calls forwarded to mobile phones. Other VoIP systems through Comcast, Spectrum or AT&T may have similar options.

For firms that have more traditional, non-internet-based phone systems or hybrid systems, check to see if voicemails can be forwarded to email. At the least, make sure all staff know how to check remotely for voicemail by dialing into the system. Then have everyone leave an out-of-office voicemail alerting callers to leave a voicemail and it will be returned as soon as possible. For certain clients, while not ideal, a lawyer can choose to provide his or her personal mobile number.

An additional solution if the firm uses a telephony system that cannot have calls rerouted or VoIP options are suboptimal is to sign up with a [virtual receptionist service](#). There are many options, including [Ruby Receptionists](#) and [Smith.ai](#).

Another option, is to alert callers via outbound voicemail message to dial a different number and get a Google Voice number. You can get the [Google Voice](#) app on a smartphone or use your computer to make and receive phone calls. You can also get a [Skype number](#), which is free if you have an Office 365 account.

Firms can consider deploying a [VoIP system](#). Many have free trials. Most VoIP systems have number porting, but there is usually a delay of seven to 10 business days. Optional or additional features bundled into VoIP systems like electronic faxing, SMS messaging, audio and video conferencing, voicemail transcription, call forwarding, and other features may save time and money when looking for remote options. [Corvum](#), which integrates with Clio, is a VoIP phone service designed specifically for law firms.

If you are going to be using your smartphone, check your plan and upgrade to unlimited talk, text and data to reduce overages.

Video Cameras

If you are going to be participating in video chats and video conferences, you will need a video camera. Most newer laptops have a camera built in, though the placement of your laptop relative to your computing setup may mean you need an external camera. There are lots to choose from and they are relatively inexpensive. There are models that clip to the top of a monitor, some have microphones and speakers built in, and some can sit on your desk and be raised with a pole. Consider your options and purchase an external video camera if you need one. The Logitech brand is a solid choice, and you can purchase one from Amazon or any “big box” store.

Microphone/Speakers

If you are using VoIP for telephony or you are taking advantage of video conferencing or audio calls, you will need a microphone and speakers. Most laptops have speakers and a microphone built in, though sound quality and external noise may be an issue. A better option is a headset with comfortable, padded over-ear speakers and a noise-canceling boom microphone. Again, Logitech is a solid choice, though there are certainly many options on the high and low end of the price spectrum.

Alternatively, [Galaxy Buds Plus](#) cost \$150 and work with any device that has Bluetooth, including your laptop or smartphone. For iOS users, Apple has [AirPods Pro](#) at a slightly higher price point, as well as other wired earbuds. Considerations with any wireless headset or in-ear audio devices include battery life, comfort, and proximity to the primary device.

Fax Machines

If you have a traditional fax machine at work with a separate phone line, it will not be easy to move that or share with multiple people on the team who are now working from home. You may be faxing to the court or with hospitals and other health care providers. While many of the electronic fax options will let you port your existing fax number, that can take seven to 10 business days. You may already have electronic fax options if you are using a VoIP system like RingCentral, so first check if that is an add-on option. If not, you can get an inexpensive plan through stand-alone [electronic fax services](#). This will result in a new fax number, which you will need to communicate to clients and other parties. You can note that the new fax number is temporary. Hopefully you can identify who would normally send you faxes, as you won't be in the office to receive them and tell them where to redirect the fax.

Printers

Before you assume that you need to print, ask yourself if it is necessary. Most documents are “born digital,” so you will just need to consider how to keep it as such. For small print jobs, a low-cost portable printer can be purchased. For larger print jobs, consider services like [FedEx Office](#) with printing and delivery services.

Scanners

If your office uses a large, floor model multi-function device for scanning, there are numerous ways to get scanning capabilities at home. If you have a desktop scanner, such as one of the ScanSnap models, you can simply take it with you. If you do not have one already, there are plenty of [scanners with a small footprint](#).

Alternatively, for smaller scanning jobs, there are many options for a smartphone. If you are using Office 365 or Adobe Acrobat DC, there are integrated scanning apps through [Microsoft Office Lens](#), the [new Office app](#), and [Adobe Scan](#). There are [many other options](#) for scanning apps, some with OCR capability and multi-page scanning.

Servers

If your firm uses a file server for shared files or to access on-premises client/server software, like your practice management software or time/billing/accounting or other firm-wide software, you will need to make that server available to your team remotely. While servers can be moved to the cloud on Amazon Web Services or Microsoft Azure, if you need to move quickly, it would be more expedient to deploy a remote desktop protocol or VPN. A VPN is more secure and generally faster and more reliable than a remote desktop service, like LogMeIn. For considerations of each, see this article from the [OR Professional Liability Fund](#).

When looking at VPN solutions, most require a “client” or piece of software to be installed on each user's device. Contact your IT support for help getting this set up. For small law firms, [SSL VPNs](#) are easier to deploy, like the [NordVPN](#), which is popular and affordable and can be used on multiple devices. Another option is the [Barracuda SSL VPN](#).

Keep in mind, firms using cloud-based systems and services like GSuite, Office365, practice management and time/billing, document management and file storage like Dropbox, ShareFile, Google Drive, OneDrive, etc., may have limited need for access to the firm's servers.

Infrastructure

Power Supplies

Lawyers and staff working from home may need extra power outlets. An outlet strip with surge protection can be purchased at Target, Walmart or most any “big box” store. For areas prone to power outages, a UPS (uninterruptible power supply) can serve as backup power. You can use a

[combination of both](#). Be sure to measure how far the cables need to stretch and buy a power strip with the appropriate cable length.

Internet

Most remote work will rely on high-speed internet access. Many people will have this available at home. Check to see that [WPA2-AES has been set on your router](#) for security. Your Wi-Fi home network should use a long and strong password to access it. Many home internet services provide the ability to create a separate network, so check with your ISP for instructions

In some cases, the remote worker's new "home office" may be located far from the wireless router, [causing slower speeds or instability](#). Your ISP may recommend or supply [Wi-Fi network extenders](#), or they can be [purchased online or at computer stores](#). You can also get a [new mesh router](#).

If you are setting up near your router, you may be able to use an [ethernet cable](#) for more reliable high-speed internet access, though both the router and computer will need the available ports.

You may also consider having a backup internet service. You may be able to use your smartphone and its data plan as an internet hotspot. Check with your carrier to see how to enable that option. It may result in a small fee if it is not already part of your plan.

Mail

Determine who in the office will receive the firm's mail and make sure that person has the capability to scan and email the files to the appropriate parties. [Mail forwarding through USPS](#) can take up to 10 business days, so you may alert the necessary parties of your temporary address. Change your address on your website, social media and GoogleMyBusiness listing. You can note that the address change is temporary. [USPS offers other options for business](#), such as P.O. boxes and premium forwarding services. [UPS](#) and [FedEx](#) both offer delivery intercept and re-delivery services. If you have a good relationship with your postal carrier or delivery driver, let them know you will be officing from a different address.

Alternatively, you can use a service like [EarthClassMail](#) to get a new address and have mail received, scanned and held for your firm. They can also deposit checks for you. Similar services include [Anytime Mailbox](#) or [Regus Mail Handling](#).

If you need to track and confirm receipt of mail but don't have the means to print and mail physically, services like [CaseMail](#), which describes its service as a "digital post office," may work for you.

Backup Procedures

If your firm has procedures in place to back up cloud data, firm-deployed laptops through online back services like [Crashplan](#) or [Carbonite](#), and server backups, then your backup protocols are in place already for remote workers. If a new laptop is deployed and an online backup service is being used, make sure to add it to the list of backed-up devices. If someone working remotely creates a file that would not be backed up under normal protocols, employees can save the files on an encrypted external drive by using backup tools like [Personal Backup](#) or use the [Windows File History](#) or Mac [Time Machine](#).

For more about backup procedures, see [When the Cloud Is Down](#) and [Weathering the Storm: 5 Step Backup Strategy](#).

Security

Because working from home means a lot of logging in, make sure that your firm is implementing proper protocols for data security. For an overview, see [Basic Security Best Practices for Law Firms](#) and the webinar, ["A Legal Professional's Guide to Securing Your Home Network"](#) from Mass LOMAP.

Passwords

Passwords should be long, strong, and unique. The recommendation to change passwords on a regular schedule has been [rolled back by NIST](#), but if someone thinks a password has been compromised, they should change it. Be on the lookout for phishing scams that suggest your password has been compromised, however, and do not follow a link in an email, but rather go directly to the site and change your password there.

[Users should not store passwords in their browser](#). Instead, opt for a password manager, like LastPass, Dashlane or Keepass. For more security and administrative controls to enforce good password behavior, consider an affordable “enterprise” plan from [Dashlane](#), [1Password](#) or [LastPass](#).

Multi-Factor Authentication

For every single account you log into, you should have multi-factor authentication turned on. You can require this feature in most cloud-based practice management, time/billing, accounting, Office 365, GSuite, social media, WordPress and more. The protection afforded from enabling multi-factor authentication is that without access to your phone or another device, if a hacker did get a password for an account, they could not access the account without the additional security factor. Here is an [explanation with instructions](#) on how to turn on the protection in some common applications. If your firm is using an application that does not offer a multi-factor option, you can use a third-party tool like [Authy](#). For a better, more secure additional factor than an SMS message to your phone, there are other tools, including a physical device like [Yubikey](#).

Wi-Fi

See the above discussion regarding security for a home Wi-Fi access point. If you are out in public, avoid using public Wi-Fi, even if it has a password, unless you are using a VPN on your device. Or use your [mobile phone as a hotspot](#).

Encryption

All firm devices and devices used for firm business should be secured with encryption. Operating systems have this capability built in; you just need to [turn it on](#). There are lots of other ways to protect confidential information. See this [video tutorial](#) on different ways to enable or use encryption for file storage, communication and more.

Phishing and Scams

As with any disaster, there are people who will try to prey on and exploit fear and vulnerability. The Cybersecurity and Infrastructure Security Agency (CISA) has issued some [tips to defend against coronavirus cyber scams](#). You can also [subscribe to alerts from the FBI](#) and distribute to your team as relevant.

Your Physical Office

If you won't have anyone in your firm for a while, make sure to lock the doors, check locks on windows, lock file drawers and offices, and [turn on the alarm system](#).

Software/Productivity

Files

If your firm saves files to the cloud, in an online document storage/sync application like OneDrive, GoogleDrive, ShareFile, Box, Dropbox, etc., then you'll just need to make sure everyone has the login information and access they need and knows how to save files to the appropriate folder. The same holds true for files stored in an online document management or practice management application. For those firms using Office 365, individual users may be syncing their files to OneDrive,

but those files aren't shared automatically. Here is how to [share OneDrive folders](#) with others in the user group.

If the firm stores files on a physical server in the office, you will need to set up access via VPN or remote desktop (see above) and provide login instructions so your team can access the files.

If your firm is still largely paper-based, most of the documents generated in the firm are “born digital.” If the firm has allowed people to store those files on individual laptops or desktops because the shared file is the print file, then get an online document storage application and have everyone move their files from the local drives to the cloud drive. It is as easy as drag and drop. Some attorneys may have already created their own online file storage, and they should be instructed to move those files to the firm's account.

Going Paperless

Now may be the best time to go paperless. In order to most effectively manage your files, you'll want to be as paperless as possible. LOMAP has addressed some general considerations of moving to a paperless office model [here](#), including how to leverage PDFs, and conducted a webinar, [here](#). This [ABA article](#) also provides in-depth instructions for document management, particularly with respect to paperless files. Part of keeping your paperless practice well organized is utilizing an effective document management protocol, which should include the application of settled naming conventions for your documents. Benefits of going paperless include leveraging inexpensive virtual space, while limiting the use of expensive real estate to store files. With naming conventions and tagging of documents with key words or phrases, you may find it easier to locate the right document when you need it.

For paper files that were received by the firm and not scanned, you will need to do a bit of triage. First determine, based on deadlines, statutes and order of importance, what paper files need to be dealt with. Then either scan them and save them to the shared online document repository or bring what you need with you.

Productivity Suites – MS Office or Google

If you are using the GSuite for productivity applications, like word processing, spreadsheets, presentations, etc., then make sure all your team knows how to log in. All the tools are available in most web browsers (Edge, Safari, Chrome, Firefox, etc.).

Users of Office 365 may be unaware that in addition to opening their files in the installed software (Word, PowerPoint, Excel), they have access to those same applications and more through a browser. Just go to Office.com on a browser and log in. Each licensed user for a Microsoft Office 365 Business and Business Premium plan has up to five installs of the Office suite. If someone working from home is more comfortable using the software, they can [download it on their device](#), with permission of the firm. The [Office app](#) for iOS and Android combines Excel, PowerPoint and Word and connects with OneDrive, Dropbox and other online document storage services.

Law Practice Applications On Premises

For firms using installed or client/server practice management, time and billing, accounting or practice-specific software, you will need to set up remote access. If the application is on a server, you can access the application through a VPN (see above), though users may also need the client software installed locally. Talk to IT and the software vendor. If the software resides on a user's desktop, then products like [LogMeIn](#) or [GoToMyPC](#) can be deployed to access the software on the device if it is not portable.

Law Practice Cloud Applications

If your law office applications are cloud-based, or hosted on cloud servers, then ensure that the team knows how to log in via a browser.

Law Practice Management Programs

Law practice management programs help keep your digital files organized and integrated under one centralized file, including all documents, emails and due dates associated with a particular matter, and will help reduce [malpractice mistakes](#) and ethical violations. Depending on your choice of provider, you'll find that they offer options for creating a variety of reusable templates and make it easy to document a client file, keep track of your time, exchange confidential information with your clients and others, manage regular banking and IOLTA trust accounts, and issue and track invoices.

We recommend cloud-based programs for their versatility and security. Popular products include: [Clio](#), [Rocket Matter](#), [MyCase](#), [CosmoLex](#), [LEAP](#), [PracticePanther](#), [ActionStep](#) and [ZolaSuite](#). [Clio and Rocket Matter are discounted for Massachusetts Bar Association members](#), and [Clio is discounted for American Bar Association members](#). [Casepeer](#) is designed for plaintiffs' personal injury practices. CosmoLex, ZolaSuite and Practice Panther have more robust finance functionalities than some of the others. CosmoLex will also give LOMAP clients a 10 percent lifetime discount. ZolaSuite is a member benefit if you join the [Social Law Library](#). Every one of these programs offers either a trial or demo, which you should take advantage of before investing in a product. The Lawyerist, [here](#), has a table comparing products and the functionalities they offer.

Dictation

For attorneys who are used to using dictation, there are some options in Windows 10, Word, and Outlook. You can dictate text, open applications and perform other tasks by voice. To enable and customize speech recognition in Windows 10, press the Windows key + H. If you haven't enabled speech services, you will be guided through the process via Settings. Like other speech recognition tools, you'll need to say, "period," "comma," "new line," etc., when dictating. If you need to correct something, just say, "undo that." You can also have text read back to you, which may help identify tone and word choice. There are a lot of [options and features](#) you can leverage with the speech recognition tools. If you don't want to turn on speech recognition operating system-wide, [Word](#) and [Outlook](#) for Office 365 have their own dictation tools built-in.

Marketing/Communications

Website and Online Presence

If you make any changes regarding phone, fax or other communication methods, make sure those changes are reflected on your firm's website, your [GoogleMyBusiness](#) Listing and your social media pages, as well as directory pages you have access to, like Avvo.

Your firm may also issue a statement through email to current and former clients, on the web and through social media, about how the firm will continue to do business, and measures you are taking to maintain a safe environment and continue to serve their needs. There are many, many businesses that have issued these types of letters to customers. In fact, it is unusual in a state of emergency NOT to get some sort of commitment to service from a provider.

Put a sign on the door of your office telling clients, as well as other visitors, how to get in touch.

Lawyers Mutual has a [social media and crisis communication policy](#) that addresses how the firm (lawyers and staff) will use social media and how the firm will communicate in a crisis.

Intra-Office Communication

Law firms will want to maintain ongoing communications with their teams if the firm transitions to remote work. One significant shift in work behavior stems from the inability to walk down the hall to chat, jump into the conference room for a quick meeting, or place a sticky note on someone's desk. Firms will need to establish ways to communicate with each other, as well as provide support and reduce feelings of isolation.

Email

Most email can be accessed through a browser, even if the firm uses an on-premises Exchange server. With a hosted or local Exchange server, ensure that OWA (Outlook Web Access) is enabled. Then, even without Outlook software installed, the team will be able to access their inboxes, if they have the OWA link and know their username and password. Firms using Gmail or another online email application will have only to log in to the application through a browser. Firms using Office 365 may not realize their email is available to them through the browser. Just go to Office.com and log in and then click to go to Outlook. As with the Office 365 productivity suite, if an Office365 user prefers to use the software versus the browser version, he or she can download the software.

Chat

For less formal communications between team members, law firms may find that they already have many tools to leverage threaded chat applications to discuss work, make unscheduled calls and conduct video chats with each other. These chat tools help a firm maintain constant contact while working remotely and can help reduce feelings of isolation. They can also keep your inbox from exploding with additional emails.

For firms using Office 365, you have Teams for video and audio calls, group chat, individual chat and more. You can learn more by watching this [video from NCBA CPM](#). For firms using G Suite (f/k/a Google for Business), you can use the [G Suite Hangout Chat](#).

If your firm uses neither Office 365 nor G Suite, there are plenty of additional options to consider. Several practice management applications, including Smokeball and RocketMatter, have built-in chat features. Check with your provider to see if there are chat options available.

A very popular and freemium (free for limited use) option is [Slack](#). The free version of Slack allows your team to chat, hold 1:1 audio and video calls, and share files, and it integrates with G Suite, Office 365 and many other products. Slack has excellent [tutorials for beginners](#) and [tips for remote working](#).

Workflow and Task Management

While working off-site, it may be more difficult to stay on top of tasks and deadlines, especially when much of the work for clients is held in individual inboxes and calendars. Your firm can create or share calendars in Office 365 and G Suite or leverage shared planning tools to immediately triage upcoming deadlines and tasks.

In Office 365, users have several options for task management. [MS Planner](#) is a Kanban-style task management tool that is available as a stand-alone or can be integrated with Teams. Office 365 also offers [To-Do](#), which is based on the Wunderlist task management product that Microsoft bought. In To-Do, users can easily create a list, invite other people in the firm to collaborate and create a running list of tasks. A list could be a client's matter, with appropriate tasks. Tasks can be assigned to a collaborator. You can add reminders, due dates, files and steps within each task.

Many practice management applications have task lists, shared calendars, procedures and workflows built in. Check with your practice management provider for options.

G Suite users have many [options to integrate task management tools](#), such as popular freemium products like [Asana](#) and [Trello](#). Asana and Trello are free for basic use.

Time, Project and Task Management

Almost every solution to improve the performance of your small or solo law firm involves project, time and task management. Effectiveness and efficiency begin with a plan about what to do and when to do it. If you need to manage a heavy workload, start by breaking down complex tasks into discrete tasks, prioritizing them, and finally calendaring in a completion date for each one. You will find resources on time management [here](#) and project management [here](#).

Staffing

Many attorneys have some experience working remotely or off-site, but support staff may not be as familiar with working from home. Everyone will need to exercise patience.

Cross Training/Procedure Manuals

Some firms may already have an operations and procedure manual. Make sure to put these in a shared repository and let the team know it is there. If the manual is in print, then scan it and share it. If the firm does not have written procedures and someone has been tasked with compiling them, there are great guidelines from the Lawyerist, "[Law Office Operations & Procedures Manuals](#)," and Law Technology Today's "[5 Policies and Procedures You Should Have in Place for Your Firm](#)."

For firms using new features of existing technology or leveraging new applications, most instructions on how to do things are a web search away. Don't spend time getting frustrated. There are plenty of written instructions, YouTube videos and more available from vendors and third parties.

If you decide to leverage a chat tool, you can create a channel for the team to share tips for ways to work in the new remote environment.

Virtual Staffing

If your firm needs help with redirecting calls, answering phones, setting up appointments and other tasks that may not have been centrally handled, there are virtual assistant and virtual receptionist services that your firm can leverage on a short-term basis, including [Ruby Receptionists](#) and [Smith.ai](#).

Working Remotely

The firm may not be able to immediately put together much guidance on remote work, and everyone who has not worked from home before will experience some uncertainty.

There are many, many articles about how to [maximize productivity](#), [create your home office](#), [reduce feelings of isolation](#) and [create a work-life balance](#). For those who have worked remotely, let those who haven't know that you are willing and available to answer questions.

You and your team may be experiencing anxiety, stress and depression during this unprecedented event. Articles from *Wired*, "[Don't Go Down a Coronavirus Anxiety Spiral](#)," and from Gretchen Rubin, "[11 Tips for Staying Calm During the Time of the Coronavirus](#)," were suggested by Jeena Cho, author of "[The Anxious Lawyer](#)." Cho provides a number of [guided meditations on her Facebook page](#) and also leads guided meditations and seminars online. She also has many other articles and helpful information about dealing with stress and anxiety. Additionally, the CPM article, "[Turn on, Tune In, Drop Out](#)," has some tips and techniques to reduce technology-induced anxiety.

PART 3: SERVING CLIENTS

It is likely that you already communicate with clients in a variety of ways, many of which are not in person. Once you have your operations decisions made, you will let your clients know. In some cases, you may have clients who are resistant to technology. Read the following paper from the ABA Techshow 2020 by Annie Arbenz and Shantelle L. Argyle, "[Loving the Luddites: Serving Tech-Averse Clients](#)," for some ideas on how to work with clients who may not be prepared to work with you online. For essentials on operating a law practice remotely, watch the webinar, "[How to Build a Virtual Practice](#)," presented by Brooke Moore.

Notifying your clients

Email

Whether you keep your client list in your contacts, in a practice management or time/billing application, a conflicts spreadsheet or a CRM application, you should pull a list of all past, current and

potential clients' email addresses. You can create three lists for distribution (past, current and potential) and send an email with information pertinent to their relationship with you. Many businesses are proactively letting customers, past and present, know how they will continue to do business and how to contact them. Depending on the size of your client list, you will want to use some sort of mass email application because [breaking the list into pieces](#) to BCC them will take a long time. If you are not currently using an email newsletter service like ConstantContact or MailChimp, [TinyLetter](#) by Mailchimp has a free account for up to 5,000 contacts. It is simple and easy to use. You may also pull a list of other contacts, including your insurance provider, vendors, co-counsel, referral sources and others.

In your letter, provide information about how the firm will do business, including any changes in phone, fax or email. Explain how, and if, meetings will be held at the office or another location. Let them know that further and more specific information will be sent regarding individual active cases.

For active matters, review your deadlines/ticklers, statutes of limitations, upcoming court appearances and other relevant information. Prioritize by the most pressing deadlines and send emails to your clients about the status of their matters and any disruptions due to various circumstances, such as court or other government facility closures, or other disruptions/limitations that you can anticipate. Reiterate any changes in contact information or mailing address.

If you do not have an email for a client, or the email bounces and the matter is active, send a letter through USPS or another carrier.

Website/Web Presence

In addition to making any changes to contact information for your firm, consider posting the same notification of commitment you emailed to your clients on your website homepage, as well as on your social media pages (Facebook, Twitter, LinkedIn, Instagram, etc.).

You may begin to create content for your site, such as FAQs, checklists and other information for your clients based on legal needs that will arise from the pandemic. A good example of proactive communication can be found at Dan Schwartz' [Connecticut Employment Law Blog](#).

Communicating With Clients Remotely

Telephone Calls

Because you may be calling from a phone number which is different from the one currently in their trusted contacts, you may want to schedule calls with your clients via email first and let them know what number you will be calling from.

In many cases you and your team will want to reduce exposure of your personal mobile numbers, so consider the telephony options you have put into place.

Email

It is likely that you already email with clients. If some of your team will be included as cc, or they may be emailing the clients directly make sure your clients know who will be communicating with them on behalf of the firm and introduce the team. Make sure everyone in the firm updates their signature block if any information has changed.

Video Conferencing

In lieu of physical meetings, many businesses are choosing to hold meetings via video conference. While Teams and Slack have audio and video capabilities, they are mainly for intra-office communications. Your VoIP system for telephony may provide conference calls and video conferencing, so before you look for a new product, see if you are already paying for one.

If you don't currently have a way to invite clients to a video conference, Zoom is a popular video conferencing system that is very easy to use and [free for up to 100 participants](#) with a 40-minute

maximum, or unlimited 1:1 meetings. Craig Ball has created a [quick guide to holding a Zoom conference](#). For more tips on successful online meetings, see the CPM article, “[\(Not So\) Secrets for More Productive Meetings](#),” and the Learning Objectives video, “[Defensive Calendaring](#).” If you are sending an event invitation electronically, make sure to include the information (link, dial-in option, etc.) necessary to participate in the invitation.

Another option is [Legaler](#), an audio/video conference platform built for lawyers. Headquartered in Australia, Legaler provides a platform that helps schedule a meeting, host the meeting, and upload agendas, documents and notes. They are currently offering the platform for free for 12 months.

Texting

For immediacy, portability and for those clients who may find other communications challenging because of the need for privacy or limited bandwidth options, giving your clients a text option should be considered. Again, if you are using one of the popular VoIP providers, you may have business text messaging available, or there are lots of other options. For a fast and free option, you could get a Google Voice number for text messaging. While certainly not the best option, you can [send emails to text](#) and receive text to email. For texting options and considerations, see the CPM article, “[Consider Texting with Clients](#).” Some practice management and CRM applications are adding text capability.

In-Person Meetings

If you have a meeting with a client that requires a physical presence, follow all protocols included in the [CDC cleaning and disinfecting recommendations](#). Practice social distancing by trying to keep 6 feet of space between participants if possible. If you or anyone else is sick, reschedule the meeting. Provide hand sanitizer at the entrance and exits if possible. Wash hands frequently and avoid touching your face.

File Sharing

There are a lot of ways to share files and folders with clients electronically. A popular method is to set up a client portal, which has the added benefit of additional features for communication. Most all of the cloud-based practice management and document management systems have client portals available. Jim Calloway from the Oklahoma State Bar makes the case for [portals versus emailing attachments](#), and there are [many options](#) for setting up a client portal using applications you may already use.

If your firm doesn't currently have a cloud-based practice management or document management system and client files will be accessed via a VPN on a server, you can still set up file sharing with clients using any number of online document storage systems, including Citrix Sharefile, Dropbox, Box, OneDrive, Google Drive or Adobe Acrobat DC. One consideration when sharing files from online repositories is that your client may have a hard time creating an account to the application or may not wish to. Many of these document platforms have the option of creating an “open” link (one that does not require an account but is protected by a password and can also be expired), made read-only and other options. Here is a [comparison of popular programs](#).

Sending Out Bills

If your firm is mailing bills to clients, consider emailing them instead. The invoices are likely generated electronically or generated with a time/billing/practice management system or through QuickBooks or Xero.

If you do not take credit cards online, this is a good time to investigate it. If your firm uses [LawPay](#), then you already have the option of sending the client a link to pay online. Keep in mind that taking credit cards electronically requires PCI compliance, so it is best to let a merchant set up this type of security protocol. A major benefit of LawPay is that you can maintain operating and trust accounts so that you

can take payments for either account without co-mingling funds. LawPay has [excellent resources, tips and tutorials](#) for taking credit cards while staying ethically compliant. LawPay [integrates](#) with most every practice management application, or you can [add a payment page on your website](#).

Collecting Signatures

There are lots of ways to get signatures from clients virtually. Of course, in some cases, you will need to collect a “wet” signature with notaries on printed paper, though there are many [times you will not need that](#). In those cases, you can collect signatures via a variety of e-signature tools, including those built into products you may already use, like Citrix Sharefile, Adobe Acrobat DC, MyCase and others. There are plenty of third-party options, too, like [HelloSign](#) and [DocuSign](#). Or, if you feel more comfortable seeing the client or parties sign, you can use the [Acrobat](#) app, [SignMyPad](#) or the Office App to have them sign on a mobile device like an iPad or smartphone.

See the following tutorial article on [sending and receiving documents for signature](#) through Adobe Acrobat DC.

Working with the Courts

Court Information in Massachusetts

The situation with the courts is evolving. Visit the following links for the latest updates:

[Federal Courts, Orders and Updates During COVID-19 Pandemic](#)

[Massachusetts Court System Response to COVID-19](#)

[Massachusetts Bar Association COVID-19 News and Information](#)

Well-Being and Mindfulness Resources

The Massachusetts Bar Association offers helpful [health and well-being resources on its website](#).

The [Massachusetts Supreme Judicial Court Standing Committee on Lawyer Well-Being](#) has also published a website with helpful resources, links and phone numbers, including a tech line.

[Mass LOMAP](#) is another organization offering many resources and tips for lawyers seeking guidance on improving their well-being.

Below is a link to live daily online practices that are being offered through the Brown School of Public Health Mindfulness Center. These sessions are free and open to everyone.

[Community Mindfulness Sessions Available Live Online or by Telephone](#)

- Mondays 5:30–6:30 p.m. — Sitting Meditation and Discussion
- Tuesdays 11:45 a.m.–noon — Mindful Pause
- Wednesdays 12:15–1 p.m. — Meditation Session
- Thursdays 9–9:15 a.m. — Mindful Pause
- Fridays 5–5:15 p.m. — Mindful Yoga Pause
- Saturdays 10:30–11:30 a.m. — Loving Kindness Practice and Discussion
- Sundays 10:30–11:30 a.m. — Mindful Yoga

Dr. Judson Brewer, the director of research and innovation at the Brown Mindfulness Center, has been putting out short (5-minute) videos every day related to what is most relevant right now. For each topic, he first starts with a little science of what is going on (e.g., how anxiety + social contagion = panic) and then gives simple tips that you can start practicing today. Here are some of the topics recently covered:

- 5 Simple Habits for Good Mental Hygiene
- Using Kindness to Create Connections During a Crisis

- Working with Uncertainty
 - How to Stop Compulsively Checking the News
 - How to Spread Connection Instead of Contagion
 - How Fear and Uncertainty Lead to Anxiety
-



The Massachusetts Bar Association's Law Firm Guide to Navigating COVID-19 was compiled with assistance from the State Bar of Michigan, North Carolina Bar Association Center for Practice Management and Massachusetts Law Office Management Assistance Program. The guide, plus additional helpful information for Massachusetts practitioners during the coronavirus health emergency, can be found on the MBA's website at www.MassBar.org/COVID-19.