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Dibble & Miller Models Law Firm Technology

BY JILL MILLER, ASSISTANT EDITOR

Gerald Dibble, a founding partner of Dibble & Miller, P.C., has not used a paper file in approximately two years, except of course when he is in court. In fact, document management is not the problem it once was for the local law firm. How can this be?

The firm's entire case management system is digital. This may come as a surprise to many in the legal community but Dibble & Miller does not keep paper files when they do work for their clients. The firm, which practices in the areas of business agreements, business formations, criminal law, debtor rights, estate planning, family law, litigation, personal injury, real estate, and tax defense, is a model for law firms of the future.

Everything from client intake information to documents to memos to audiotapes and photographs, is stored in the firm's internal file system online. The conversion to a completely digital office has saved the firm countless hours and money.

"Document handling is not an issue for our firm anymore," Dibble explained. "Our firm no longer uses paper to practice law. I think we are somewhat unique. I don't know of any other firms who use this type of technology."

The only exception, is when the attorneys attend court they take a file with them, but even that is slowly changing.

Making The Change

The firm made the conversion from a paper office to a digital office approximately two years ago. Dibble, who has experience as a computer programmer, first witnessed the benefits of computers when the office installed its first computer system in 1984. Back then Dibble designed a client database system that served as a digital Rolodex.

As the firm's needs grew along with the cost of practicing law, Dibble began experimenting with the idea of converting to a paperless office. He felt the move would save the firm and its clients money and time. The result is the program he designed that is currently in place.

The firm worked with Xerox Corp.'s DocuShare Internal Document Management Program. However, the Xerox program wasn't exactly what the firm was looking for so Dibble fine-tuned the program to meet the firm's needs.

"Xerox gave us a database program that allowed us to click on a document in order to review it," Dibble explained. "We looked at this program and realized its power. However, the practice of law is different and thus we had to draft a program to meet our needs."

Dibble designed everything from how the program is set up to how documents are sum-

marized, numbered and labeled.

"It was a nice challenge," he said. "It was really a matter of sitting down and figuring out what the office needs are and then designing a program to meet them. This program has saved the firm and clients money and time."

Program Benefits

The current system allows the firm to do a number of things. To begin with, the firm's conference room is equipped with a computer and printer. This allows an attorney to input client information immediately and to give the client forms and firm literature appropriate to the proposed representation, without ever leaving the client's presence. The specially designed on-screen client intake form includes everything from the type of service the client needs to how they were referred to the firm, to a client's hobbies, including background information (such as their date of birth, Social Security number, occupation, education, type of work they do, health, prior marriages, children and, where appropriate, whether they have been arrested) as well as e-mail addresses and emergency contact numbers. The client also has the opportunity to review the information on screen as it is being keyed into the system.

Next, the system allows attorneys to conduct file searches and retrieve any file within seconds. Each file includes a summary of every document listed in the file. This allows an attorney to find what he or she is looking for without actually reviewing the entire file. In fact, every document for every client is summarized in as many words as are necessary to inform the attorney or paralegal what the document is about.

"This is a crucial timesaver," explained Michael Burger, an attorney with the firm. "I can review the file sheet in order to see if what I'm looking for is there. If not, I can move on quickly. There's no more searching through stacks of papers, trying to find the document I need."

Attorneys also review and edit documents digitally. This eliminates the need for attorneys to send additional letters highlighting the changes to a particular document.

"For example if a lawyer sends me a document that he or she wants me to review, I can call it up on screen and make any changes that are necessary and send it back to that person," Dibble explained. "We can track the changes made. The power of that is incredible."

Dibble explained that the document is never printed, and never touched by a staff person. He reported that he has done large commercial legal transactions, and never had to print the document and never needed the assistance of a staff person. When the transaction is completed, either digital signatures are affixed or an actual

signed copy is scanned into the system and is placed into an archive file.

The system is accessible to every employee in the firm and files can be reviewed by more than one person at a time. If a client calls with a few questions, their file can be accessed with just a quick click of the mouse. With just a few clicks, and within just a few minutes, the firm also can give clients copies of their files on CD-ROM, and can even e-mail them to the client, a move that eliminates the cost of copying and mailing a file. It does not make any difference how many files there are, when files are given to client on a CD-ROM.

"Any lawyer in our firm can take a call and scan that client's file on the screen in a matter of seconds and know what is happening with the case," Dibble explained. "This is all done without picking up a piece of paper."

In addition, the firm can e-mail a document to another firm, to the court or to a client within seconds at any time.

"Many of our clients are closely held businesses," Dibble explained. "Our digital virtual office has allowed us to virtually eliminate the expense associated with paper management. The cost of preparing to take a case to trial is much cheaper."

All employees of the firm are trained on the system. The system is also accessible from offsite locations. An attorney who may be out of town is still be able to work on a case, and can even take all of the files and documents of a client on a portable computer if he or she wishes.

In addition, the firm has 14 offsite backup copies of the system. If a disaster was to hit the office, the firm could be up and running at an alternate location within a few hours.

"Our employees love the system because of its efficiency," Dibble explained. "Our clients are also happy with it because it saves them money."

According to Dibble, technology has leveled the playing field between small law offices and the larger firms. However, he notes that some firms and the court system are slow in adopting the latest advancements in technology. This has caused a few bumps on the road to a paperless future.

Some of these impediments include lawyers who do not use Acrobat or e-mail; judges who require hard copies of documents; and attorneys and judges who use Word Perfect, although Dibble & Miller is able to convert documents from this and other programs.

"I haven't touched a paper file in over two years, unless I'm in court," Dibble explained. "It's wonderful. We have virtually eliminated the problem of document management which in turn has allowed us to provide better service to our clients while cutting costs at the same time."