

STAR Watch

Statewide Technology Assistance Resources Project

A publication of the Western New York Law Center, Inc.



Volume 15 Issue 2

Mar-Apr 2011



Faxing: When time seems to stand still

It started out as an observation by one of our paralegals: Faxing documents by traditional methods takes too much staff time. In the process of working out loan modifications for our clients, we are submitting a lot of documentation packages to mortgage servicers and legal firms. The process is not that difficult, but it can be time-consuming...

- Assemble all of the paper documents. Fax machines only transmit images that are on paper.
- Remove all of the staples without tearing the pages; Replace any beat-up pages with new ones; Don't mix up the pages; Don't drop the stack of pages to be faxed.
- Write the client's loan number on every page to be transmitted
- Break the documentation package into sections containing no more than 50 pages since the document feeder cannot handle more than 50 pages.

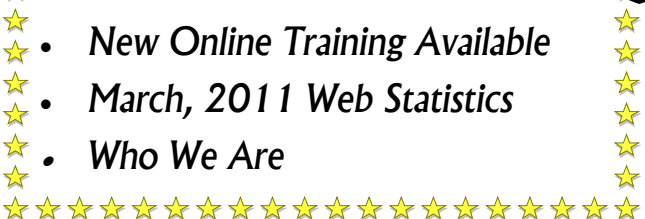
- Fill out the cover sheet
- Put the first package in the fax machine, dial the number, and press Start.
- Then, stand by the fax machine to make sure that there are no jams or misfeeds until the entire document package has been processed. A large document package could take 25-30 minutes to transmit. If there is a problem, fax the document again.

There are better ways to use staff time.



In this issue...

- *Faxing: When time seems to stand still*
- *New Online Training Available*
- *March, 2011 Web Statistics*
- *Who We Are*





The quest...

Initially, the goal of the investigation was to just find a better fax machine. It didn't take too long to figure out that the standalone fax machine we had was one of the best. There were very few fax machines that had more capabilities in an affordable price range.

Eventually, we looked at our copier/network printer. According to the literature, a fax board could be added to the machine. But our hopes were dashed when we were told that the fax boards were no longer available due to the age of our machine.

Just when it appeared that nothing could be done, we got a call from the owner of the company from which we purchased our current copier/network printer. He had a machine that had just come off of lease. It was newer than our copier/network printer and had very low usage, all of the features that we needed (including a fax board), and – the price was right. We traded in our copier/printer for the newer model. It was delivered and installed without incident. The faxing feature worked better than expected.



Leveraging the improvement...

It was a few days later that the staff's imagination got the better of them and they began to ask questions. After a little research, we could provide answers...

- After a fax is received, can a copy of the fax be stored on a network drive before it was printed out?
- Yes, we can do that. And better yet, we had the option of saving the file as a PDF which could be manipulated by Adobe Acrobat. It is not necessary to scan faxes back in to create an electronic copies of them.
- Is it possible to scan documents and email as PDFs attached to the email, but is it also possible to scan the documents and store them directly on the network?
- This can also be done and it involves fewer steps to access the scanned document. Scanning documents directly into a folder on the network saves time.
- Can anything other than paper documents be faxed?
- Any file type that can be printed can be faxed. It seems like a waste of time to repeatedly handle paper when documents in electronic files cannot get pages out of order, dog-eared, upside-down or lost. Additionally, staff do not need to leave their offices to fax any file that could be maintained in electronic format.
- Is there a way to create and/or manipulate electronic documents?
- Adobe Acrobat allows users to create a single PDF file from multiple PDFs or break a single PDF into multiple PDFs. It also has an extra bonus feature that is a timesaver: Water-marking. For loan modifications, many of the loan servicers require that the loan number be included on every page of the document package submitted to them.



- The watermark feature in Adobe Acrobat allows a user to comply with this requirement by selecting the Watermark feature, entering the text to be shown in the watermark, the size of the text, the location of the text on the page, and the range of pages to be watermarked. The user enters the loan number once. Adobe adds it to the desired pages.

Putting all of the pieces together...

It wasn't too long before we came to the realization that we had almost all of the tools needed to substantially reduce the drudgery imposed on us by handling and faxing so much paper.

- A single network location was designated to contain all electronic files for cases. No case-related documents are to be stored on staff workstations. Every case will have its own separate folder. The use of sub-folders to better organize case documents is encouraged.
- All word processing documents created in-house are to be stored in the case folder on the network.
- When a case-related fax is received, the printed copy of the fax is placed in the physical folder that contains all of the documents for the case. The electronic copy of the fax (in PDF

format) is copied into the case folder on the network.

- Any paper documents that were mailed to the office or provided by the client are scanned in, and saved as PDFs in a network folder. The attorney or paralegal then copies them to the case folder on the network.
- Using Adobe Acrobat, the attorney or paralegal can break up a large PDF into smaller, more manageable PDFs and store them in the case folder on the network.
- When it is necessary to fax a documentation package, the attorney or paralegal again uses Adobe Acrobat to assemble a single large PDF from documents and other PDFs

in the case folder. As a last step, all of the pages in the PDF are watermarked with the client's loan number. To fax the PDF to the recipient, the user opens the newly-created PDF, clicks on "Print", select the Fax device as the destination. Another window is opened to allow the user to enter the telephone number of the receiving fax machine and click "OK".

The PDF file is transmitted via the fax feature to the receiving fax machine. The attorney/paralegal never leaves his/her desk. A report documenting





the successful transmission of the file is printed out (we could not figure out how to create an electronic copy of this – maybe later). Most importantly, the fax machine does not need to be watched for paper jams or misfeeds because there is nothing to jam or misfeed. While the document is being transmitted, staff can perform more useful work.

- The PDF (created in the step above) could also be emailed as an attachment.

Results to date

It has only been a month since we implemented the new procedures and opinions about the procedure change are what we expected. Staff members that send/receive the most faxes are the most positive about the change. Those that do little or no faxing are guardedly optimistic. So far, there have been no negative opinions expressed.

When asked to detail how the change benefits them, staff members have quantified the benefit:

In the past, for every mortgage modification sought, we created an application for mortgage modification that was approximately 50 pages in length. The application was usually revised 3 times. Every time the application was revised, a copy was faxed to the loan servicer and counsel for the loan servicer. Every time we attended a settlement conference, we would bring courtesy copies of the application (on paper) for the court and opposing counsel. In the average foreclosure case, document packages containing about 50 pages would be faxed on 8 different occasions

and courtesy copies totaling about 100 pages would be printed. That translates into 1.0 to 1.5 hours to babysit the fax machine – per case.

Now, an experienced staff member can send a fax in less than 1 minute. On a per case basis, a staff member can save 52 – 82 minutes. We have also been able to convince opposing counsel and the courts to accept electronic courtesy copies. That is approximately 100 pages of documentation (per case) that we do not need to print, nor carry it to the settlement conference. But that is only one case: We handle hundreds of cases per year.

We fully expect that the time savings gained from the new procedures that we have put in place will pay for the fax upgrade to our printer/copier within the next three months.

Most importantly though, we have been able to reduce wasted time. Paralegals have more time to perform tasks that are helpful in solving a client's foreclosure problem. This improvement in productivity comes not a moment too soon.

Reports have been circulating that a new flood of foreclosures are about to hit. When that happens, we will need all the help that we can get.





New Online Training Available

A new training is available for viewing over the web by attorneys and staff. There is no charge for viewing this training.

To view the training...

- Go to this location:
<http://onlineresources.wnyc.net>
- On the left side of the screen, click on "Online Training"
- Click on the desired training; a registration form will be displayed
- Fill out the registration form; then click on "Submit form". A link to the presentation will be sent to the email address provided in the registration form

If you are an attorney and wish to receive CLE credit, you must fill out the course evaluation and attorney affirmation forms and mail it to the address on the form along with payment for processing of the CLE credit request. New York State Bar Association rules require that the forms be mailed. They cannot be submitted electronically.

Working With LGBT(Q) Clients

A disproportionate number of lesbian, gay, bisexual, transgender, and questioning/queer (LGBTQ) adults and youth live in poverty. As a key service provider in their safety net, civil legal services offices

should be both welcoming and have specific competency to appropriately serve and support these communities. The presenters will discuss the research documenting the intersection of poverty and economic injustice in these communities. They will further address the emerging needs of LGBTQ-identified youth, including youth in the foster care and juvenile justice systems. Participants will also learn about ways that civil legal services office can create an inclusive, safe, and comfortable atmosphere both for clients, as well as LGBTQ staff.

Date of presentation: 03/29/2011

Presenters: Kimberly Forte, Esq., Special Litigation and Law Reform Unit, Legal Aid Society, Juvenile Rights Practice of New York City; Virginia M. Goggin, Esq., Orrick Legal Fellow, LGBT Law Project, New York Legal Assistance Group (NYLAG); Amy Schwartz, Esq., Domestic Violence Legal Program, Empire Justice Center

Viewing time: 92 minutes

CLE credits: There is no CLE credit available for viewing this presentation

Cost for viewing this training: There is no charge for viewing this presentation.



WNYLC Web Statistics For March 2011

Total Hits.....528,966
 Number of Pages Viewed.....151,117
 Total Visitors.....61,912
 Average Hits/Day.....17,063
 Average Pages /Day.....4,874
 Top Web Browsers Used:
 Internet Explorer 8.x.....30%
 Internet Explorer 7.x.....32%
 Internet Explorer 6.x.....20%
 Firefox.....16%
 Google Chrome.....1%

Top Operating Systems Used:

Windows 7.....3%
 Windows Vista.....12%
 Windows XP.....41%
 Mac OS.....1%



WHO WE ARE

Joe Kelemen - Attorney
 Lauren Breen - Attorney
 Keisha Williams - Attorney
 Danielle Mayer-Dorociak - Attorney
 Amy Kaslovsy - Attorney
 Nicole Talev - Attorney
 Graham Leonard - Paralegal
 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

Want to know when StarWatch is available?

If you wish to receive an email telling you when the next edition of StarWatch is available, please email us at starwatch@wnylc.com. In the subject area, simply enter the word "Subscribe". When the next edition of StarWatch is available, we will send you an email that contains a link to the newsletter.

If don't wish to receive email notifications, send us an email to starwatch@wnylc.com with the word "Unsubscribe" in the subject area. We will stop sending email notifications to you.

WNYLC values your privacy. If you provide us with your email address, Western New York Law Center will not give the information to any other organization.