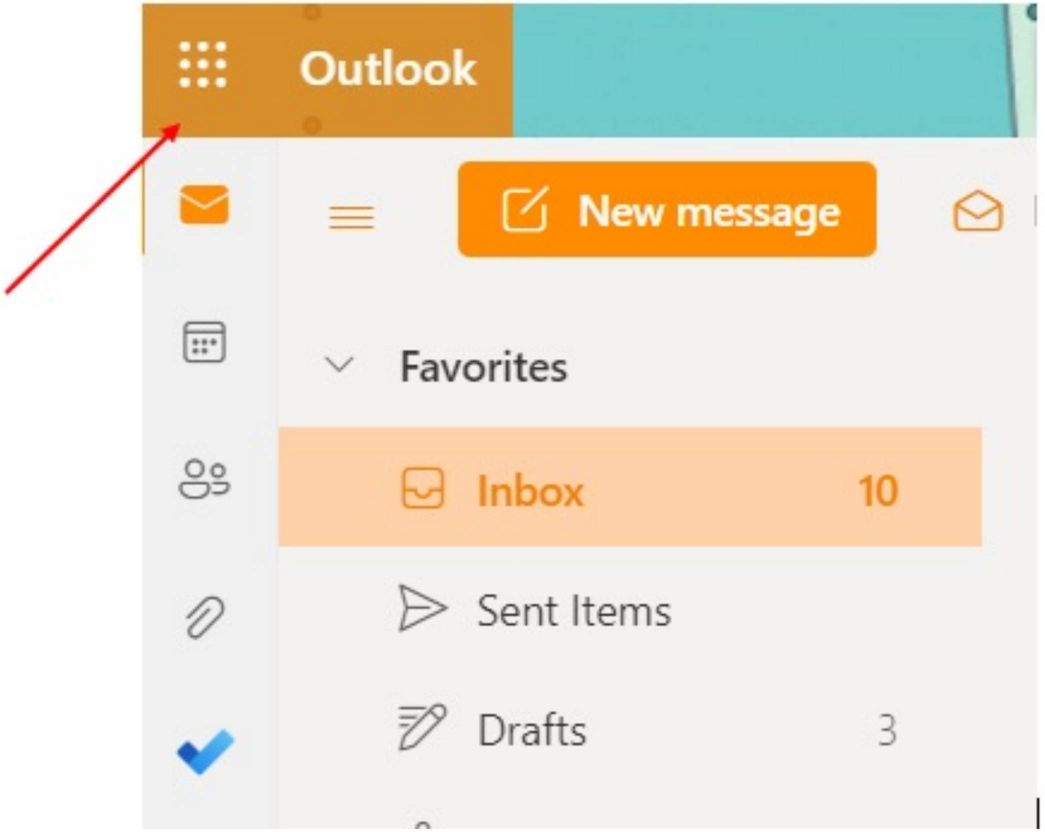
Have needy clients? Admin staff out on vacation? Your child used your planner/calendar as a coloring book?

Special Thanks to Paulino Estevez, esteemed office manager, for this amazing Powerpoint!

Bookings

What is Bookings?

- Bookings is a Microsoft 365 application that syncs with your calendar and allows clients to book their own appointments.
- Benefits:
  - Gives clients the autonomy to book on their own time
  - Free up your admin staff's time (or better yet, YOUR time) to focus on other productive matters.

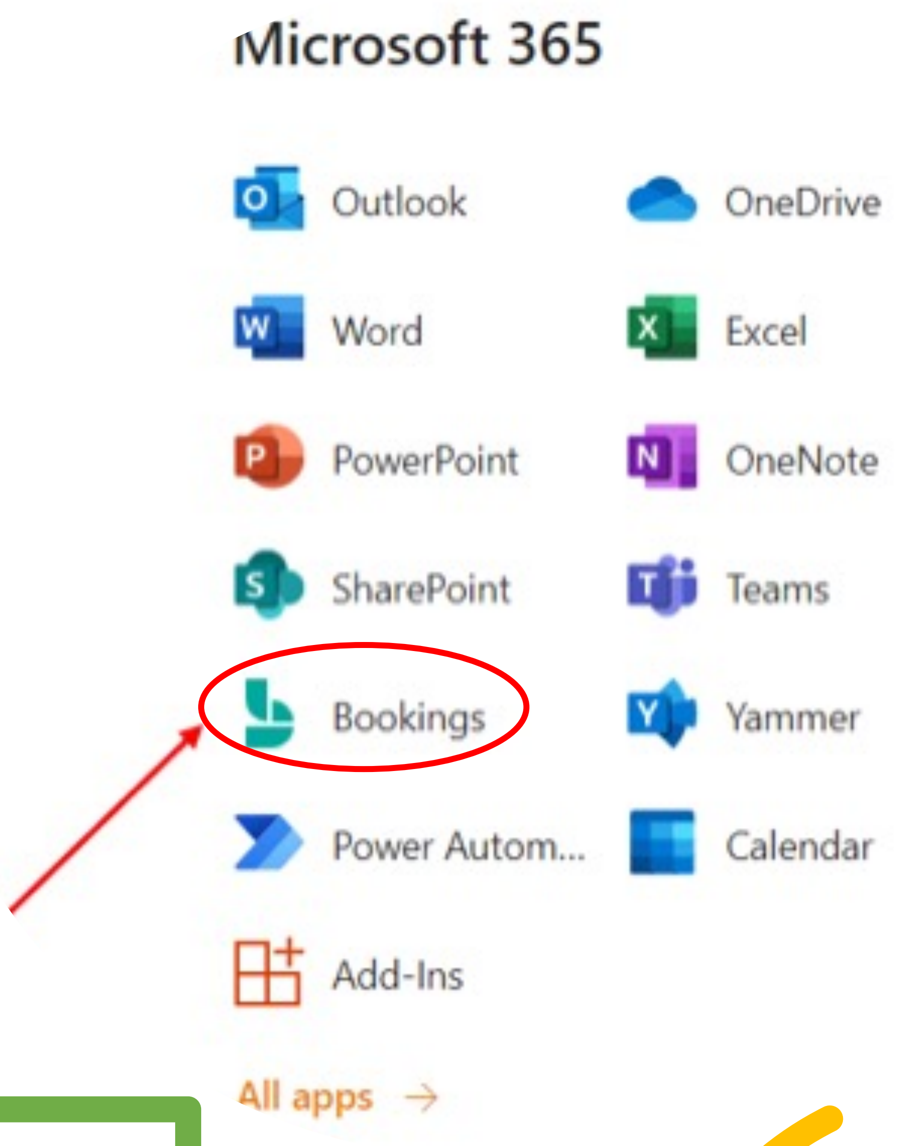


But wait! How does it work?!

If you have Microsoft 365, you can search for Bookings by clicking the little squares in the upper left corner of your web browser, from any Microsoft 365 application page.

NOTE

Make sure you are doing this through your web browser, NOT from the app on your desktop.



If you don’t see the Bookings app, click “All apps” and search for the Bookings integration.

A consult and a depo?!?

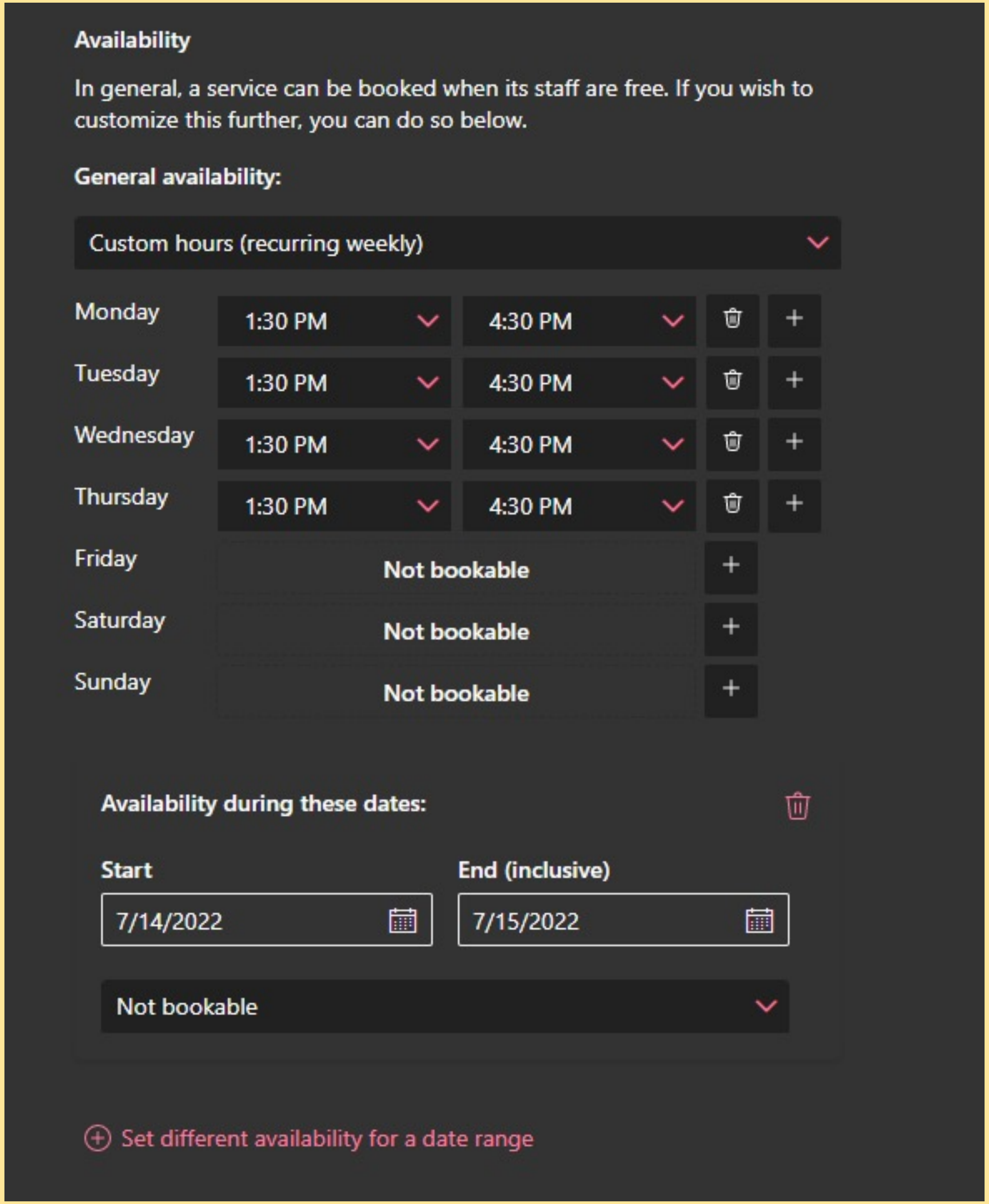
How do I prevent conflicts?!

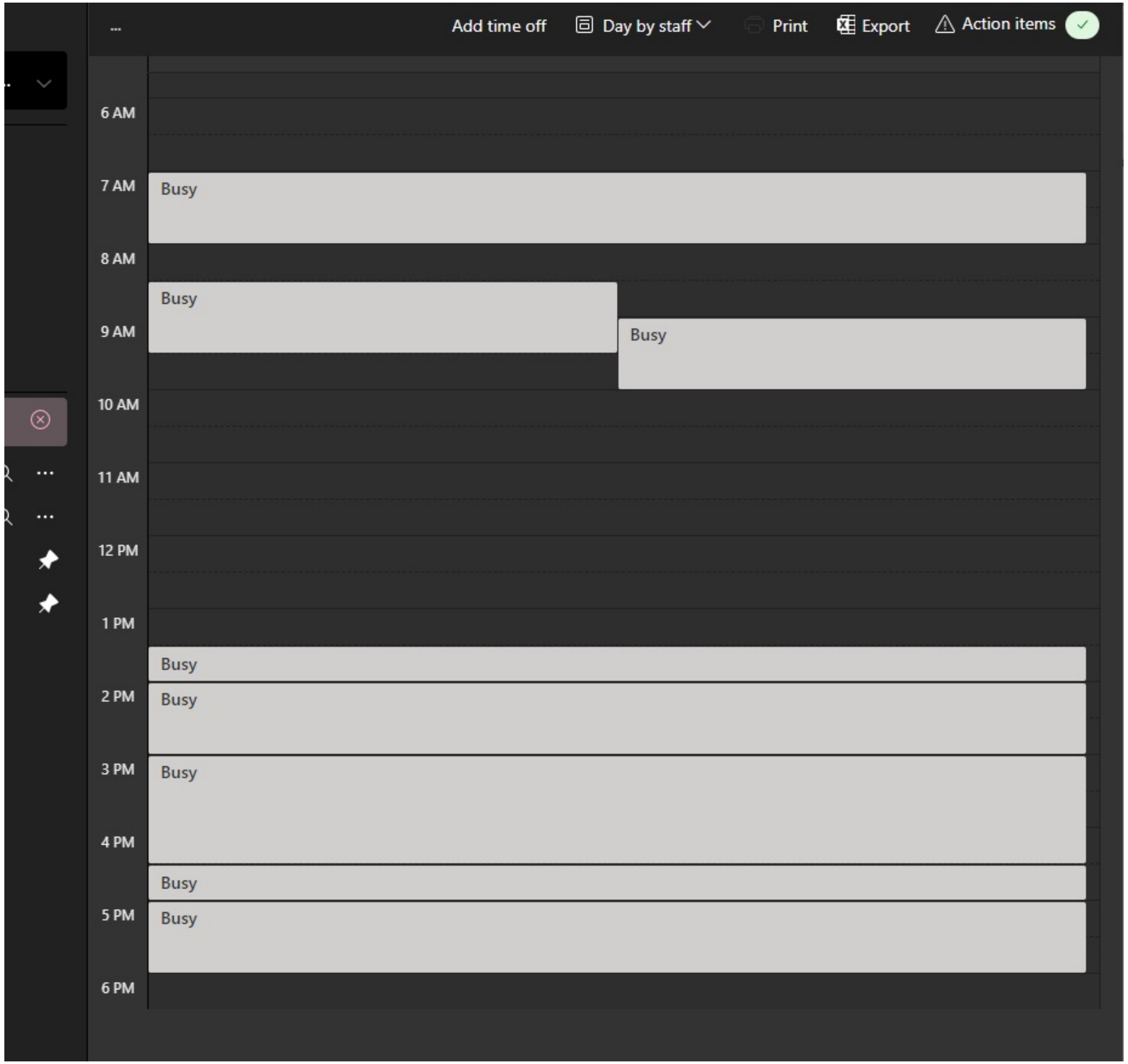
Unless you can use Hermione's time turner and be in two places at once, you probably want to avoid being double booked during a single time slot.

You can set/limit your Bookings calendar to only allow appointments to be scheduled during the days/times that work best for you.

Integration!

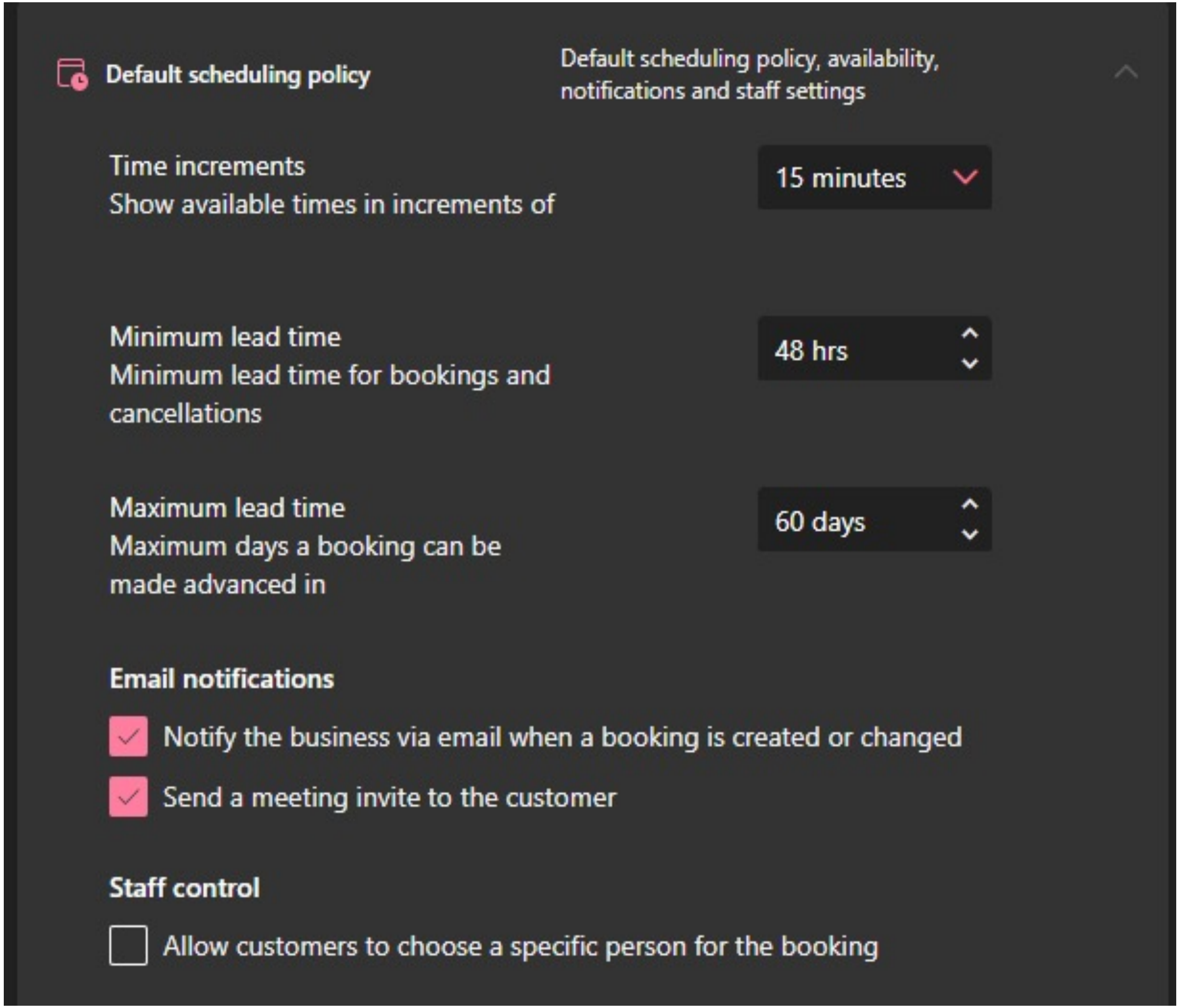
- First, set your availability.

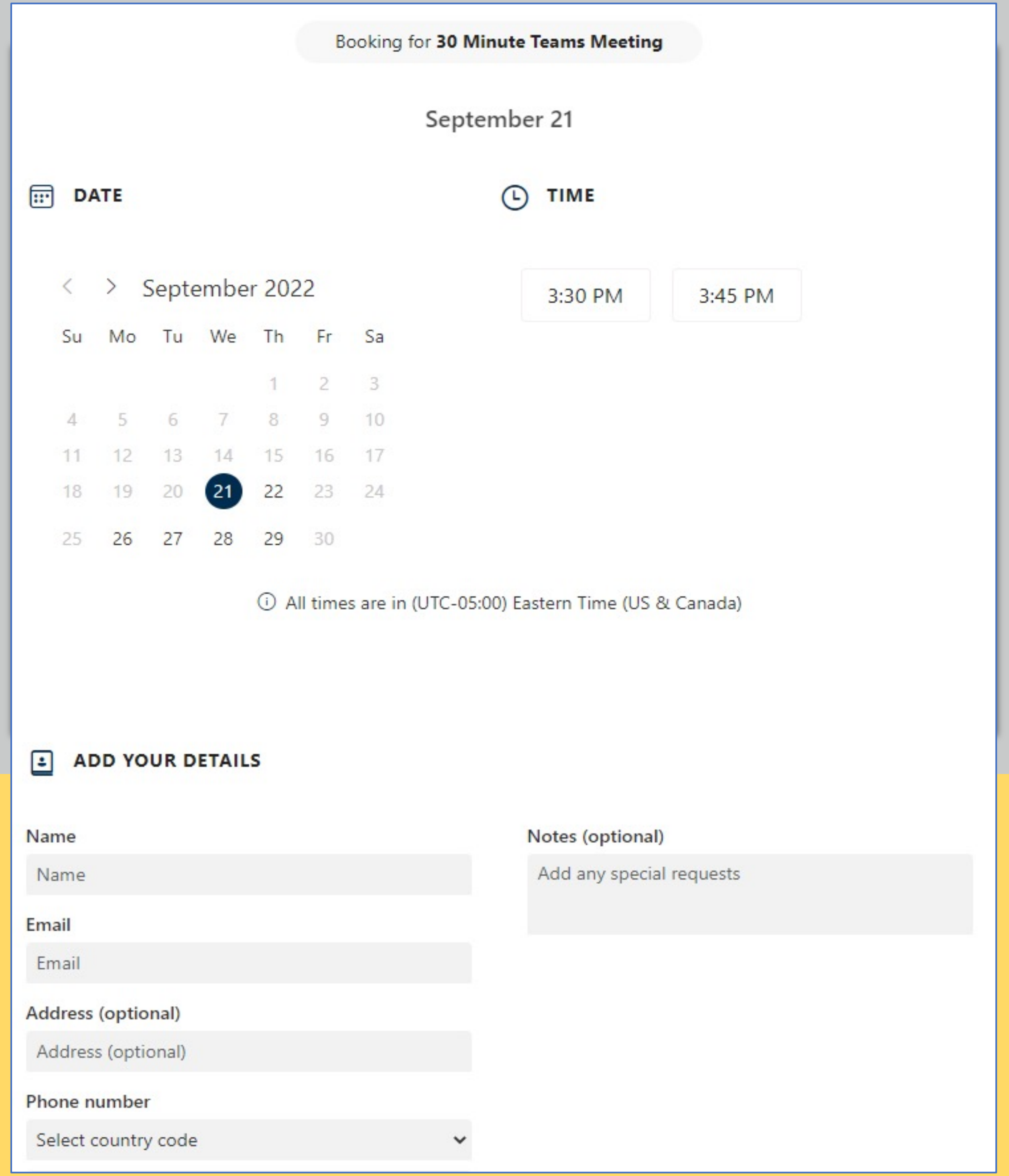




Next, let the integration begin!

Other helpful settings.





- What the clients see

Pro Tip!

Sincerely,

Christie L. Guerrero, B.C.S.
Board Certified Family Law Attorney

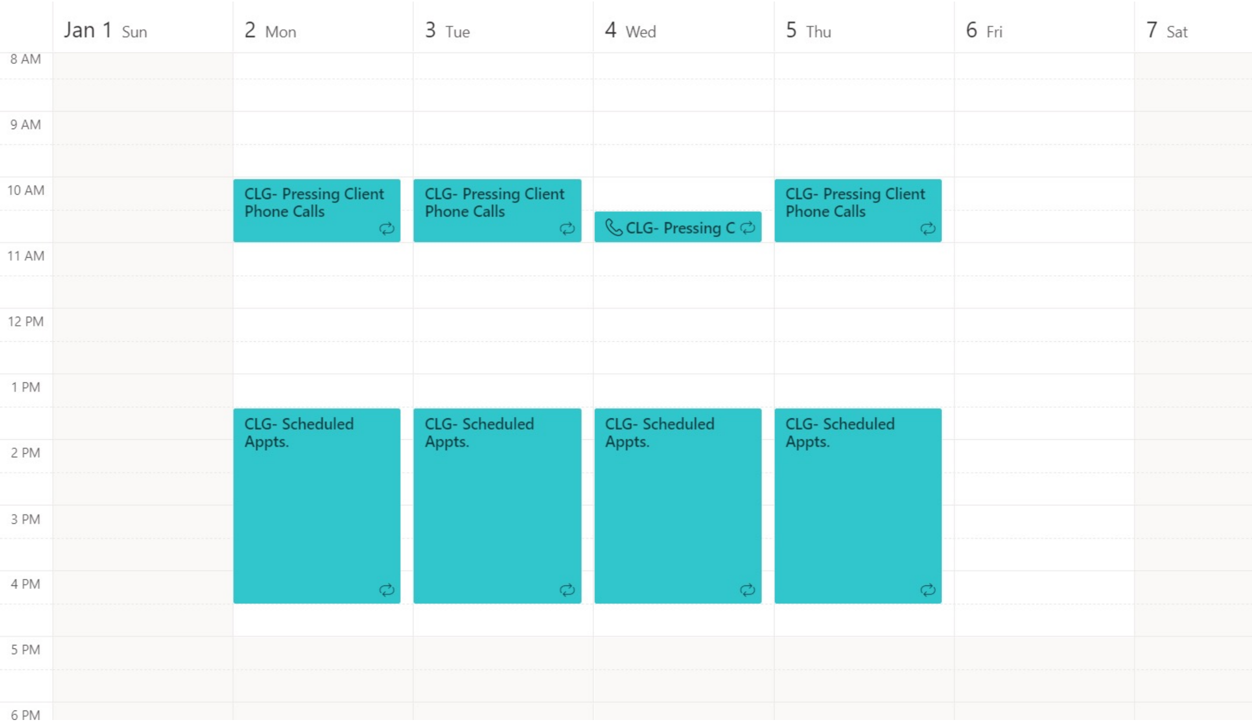
Sasso & Guerrero
9191 R. G. Skinner Pkwy, Suite 703
Jacksonville, Florida 32256
Phone: (904) 619-1386

If you would like to schedule an appointment with me, please click here.

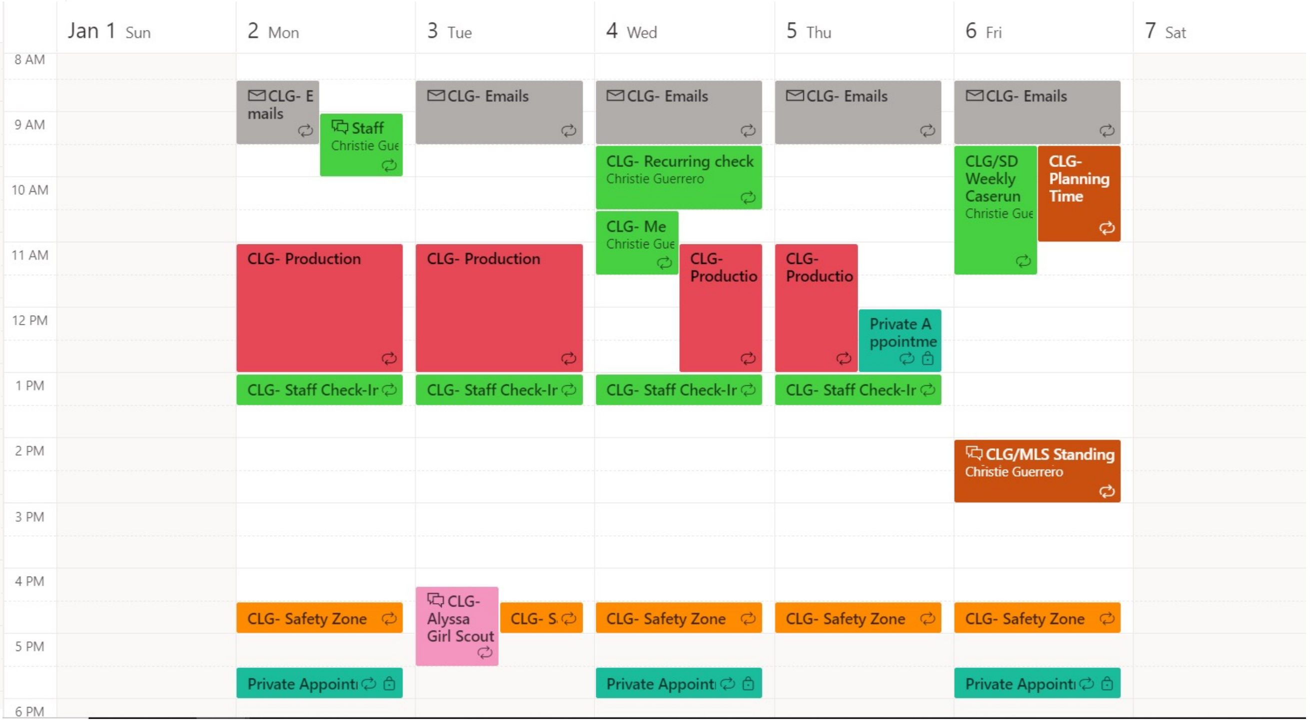
If you would like to make a payment towards your account, please click here.

Here's what my calendars looks like.

Client Contact Time



Office Events



Don’t worry Cory, it’s not as scary as it looks.

Ready for more automation?

Similarly, many client management programs also have a similar function for potential clients.

Once you get the client through the intake process, and a conflict check has been completed, you can also create a link that potential clients can use to schedule (and pre-pay!) their consultation appointments.

For those who have Clio, you can read this article here for further information on Clio scheduler.

Other Popular Calendar Apps

- Calendly
- Acuity Scheduling
- Schedulista

Issues with getting your client’s discovery?

Yup, there’s an app for that, too!

pipe | file

What is pipe file?

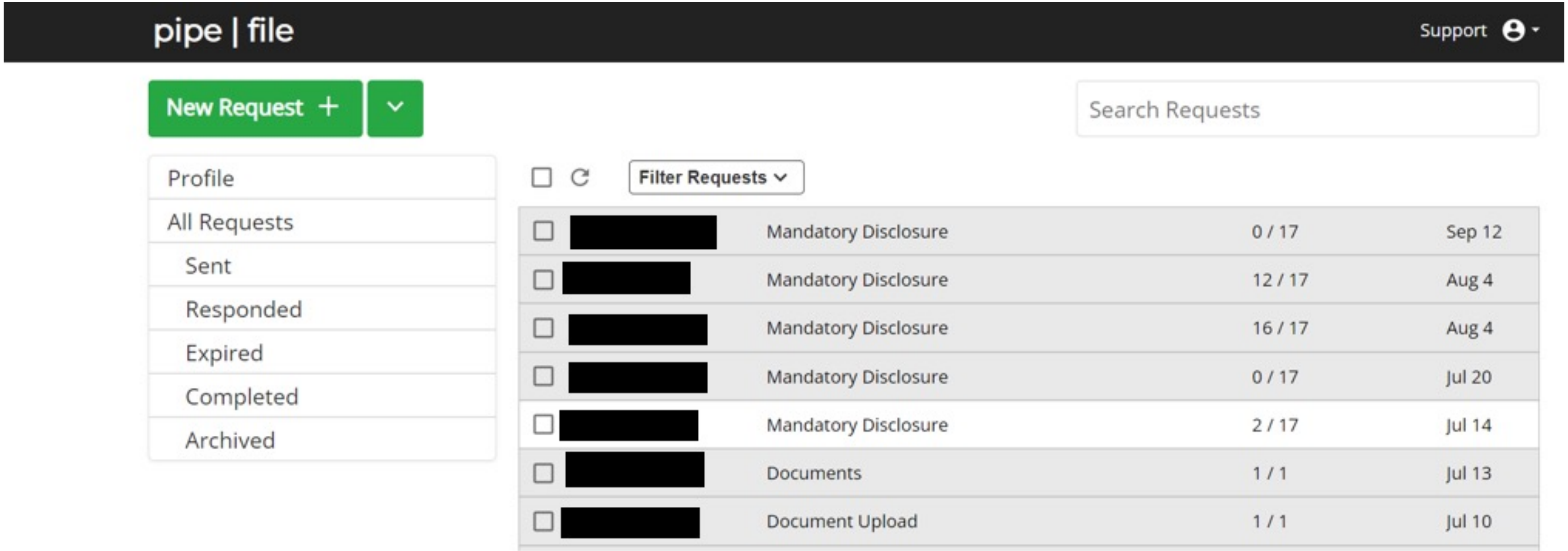
Pipe file is kind of like Dropbox, only better!

- Clients upload their documents to one central location, in an organized fashion.
- You create the organization for them!

Using it as a check list for mandatory disclosure will help alleviate dealing with the Grogus ("Baby Yoda" for the uninitiated) who can't seem to stay on track.

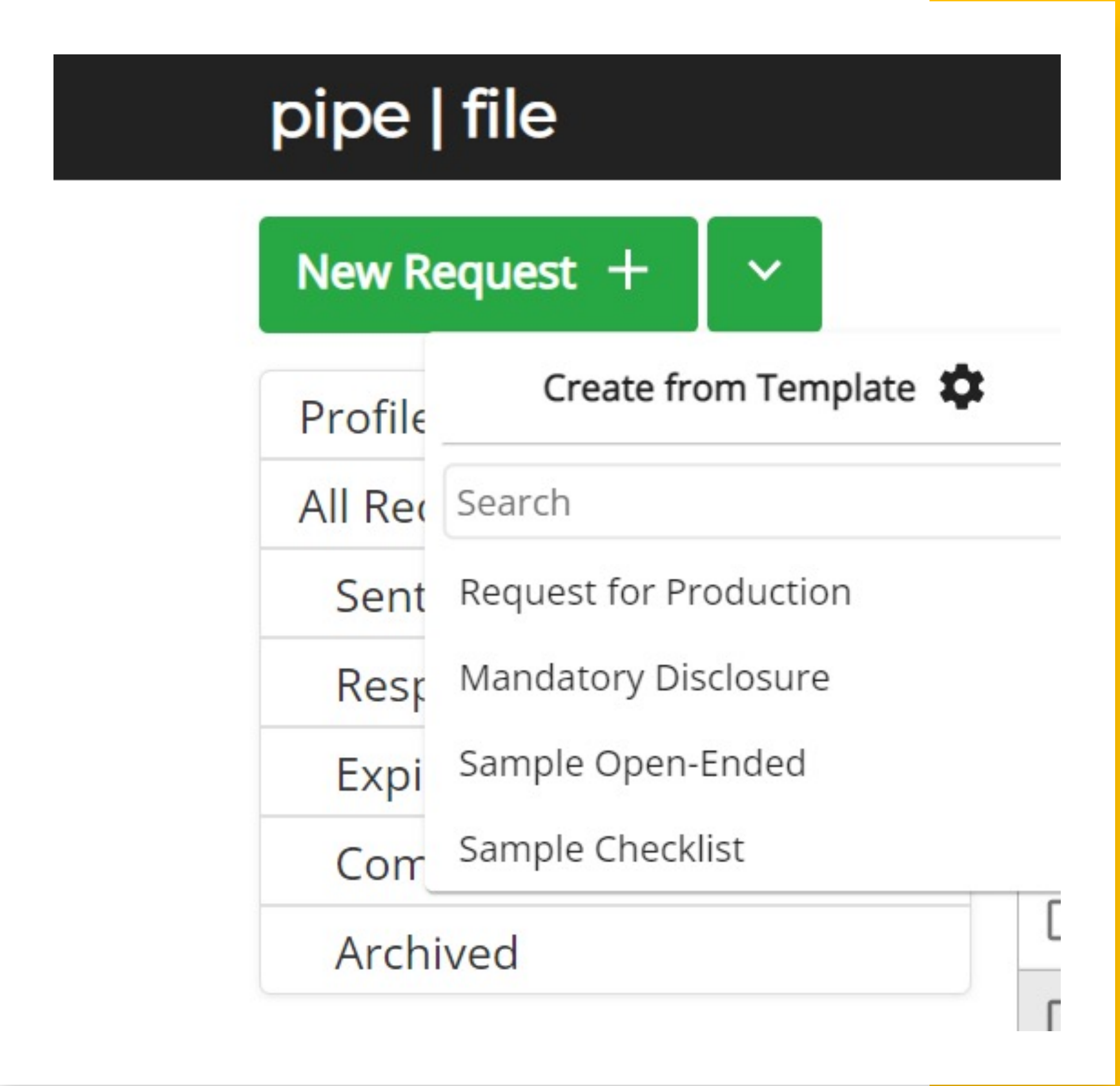
Your main dashboard.

Here you will be able to create, send, and monitor document requests for each individual client.



- The first step is to create a template of the documents you want your client to send to your client, e.g. mandatory disclosures.

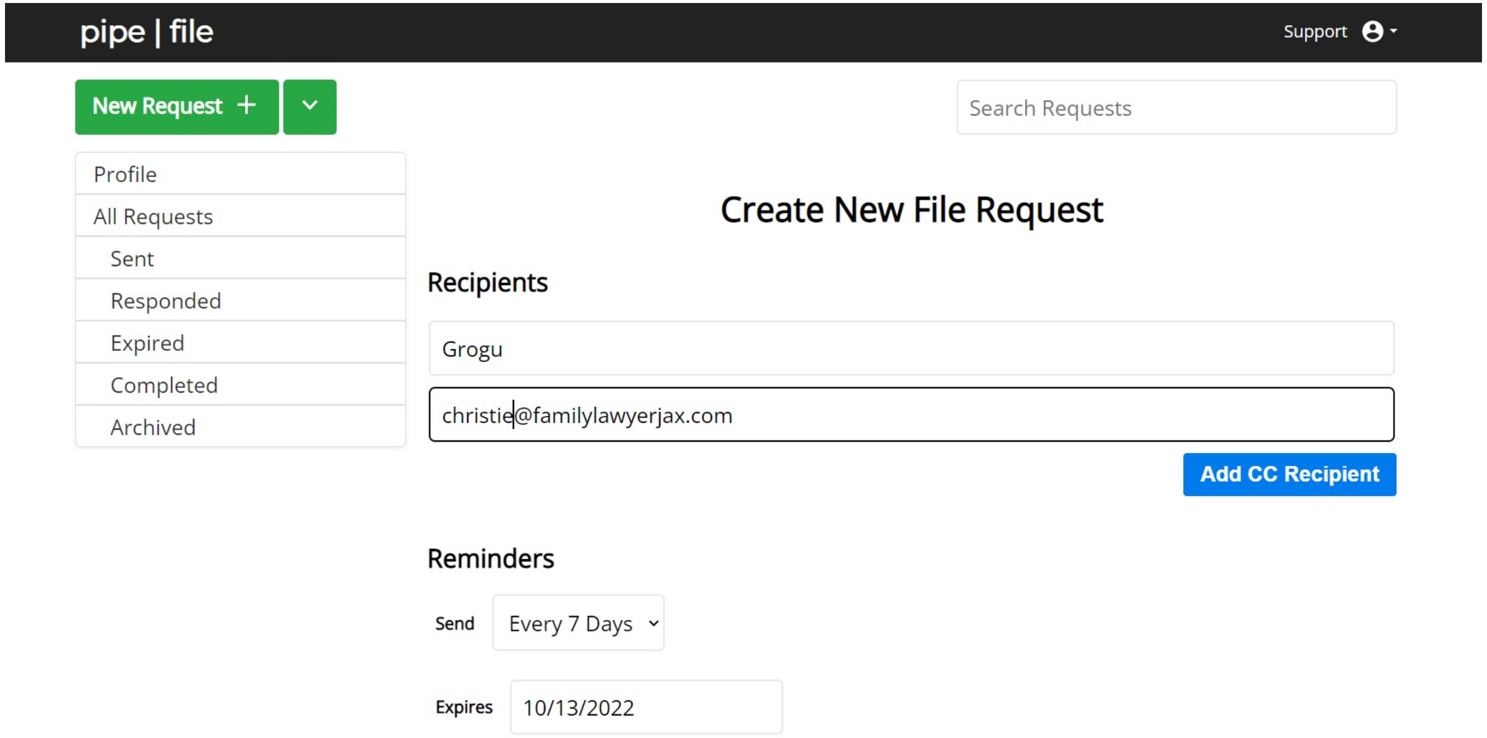
- Once you create a template, you can use it again and again.



After you've completed a template, you can begin sending requests to clients.

Here you will enter the client information, and anyone you want to copy. You do not need to copy yourself, since you as the user, will receive notifications once the client has completed uploading all the requested items.

You can even set reminders, so Grogu stays on track before Mando files a Motion to Compel.



Once the template is sent to the client, they will see something like this, with several user-friendly upload options.

Income Tax Returns

tax returns filed by you or on your behalf for the past 3 years, including all attachments, Forms W-2, 1099, K-1, and all accompanying schedules and worksheets comprising the entire tax return.

Attach Files

Advanced

×

IRS forms W-2, 1099, and K-1

IRS forms W-2, 1099, and K-1 for the past year, if the income tax return for that year has not been prepared. If income tax returns have not been filed for any of the prior 2 years beyond the past year, the IRS forms W-2, 1099, and K-1 for those prior 2 years as well.

Attach Files

Advanced

Financial Disclosure

All loan applications, financial statements, credit reports, or any other form of financial disclosure, including financial aid forms, prepared or used within the 24 months preceding compliance with these disclosure requirements, whether for the purpose of obtaining or

Attach Files

Advanced

×

Deeds and/or Lease Agreements

All deeds evidencing any ownership interest in property held at any time during the last 3 years, all promissory notes or other documents evidencing money owed to you (or the other party) at any time within the last 24 months, and all leases, whether held in your

Attach Files

Advanced

When the client has responded to all requests, you will get a notification via email indicating all documents have been submitted.

pipe | file

[redacted] has submitted all requested documentation. Please use the link below to review their files:

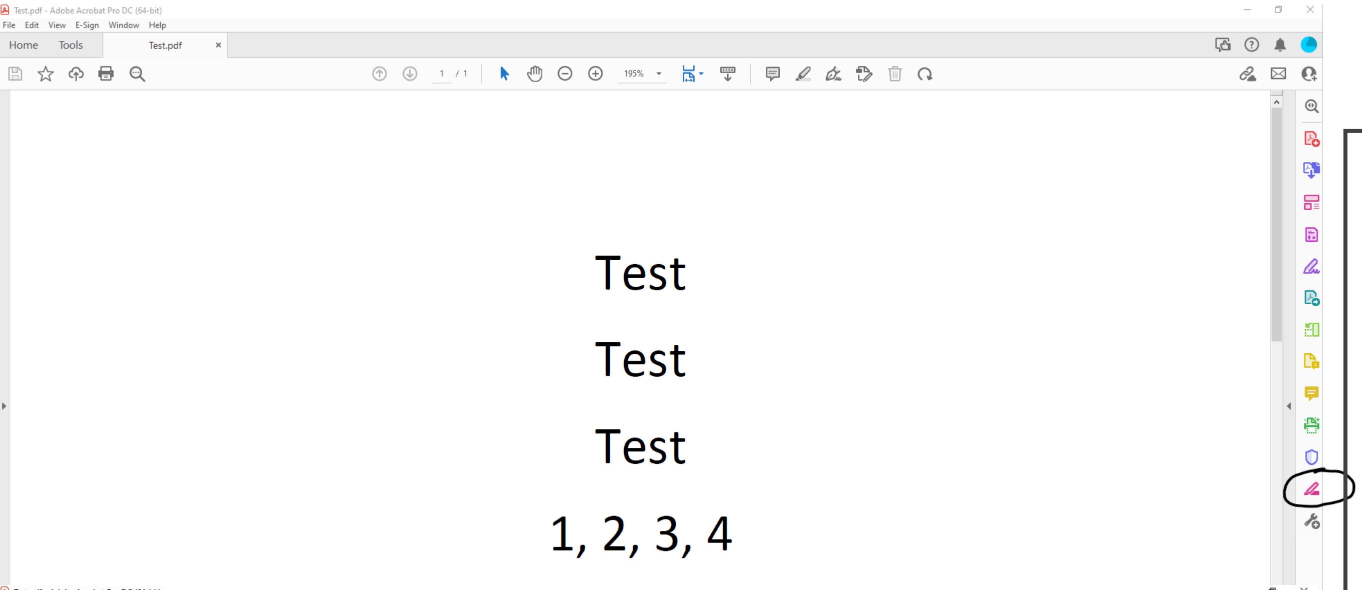
View Files Here

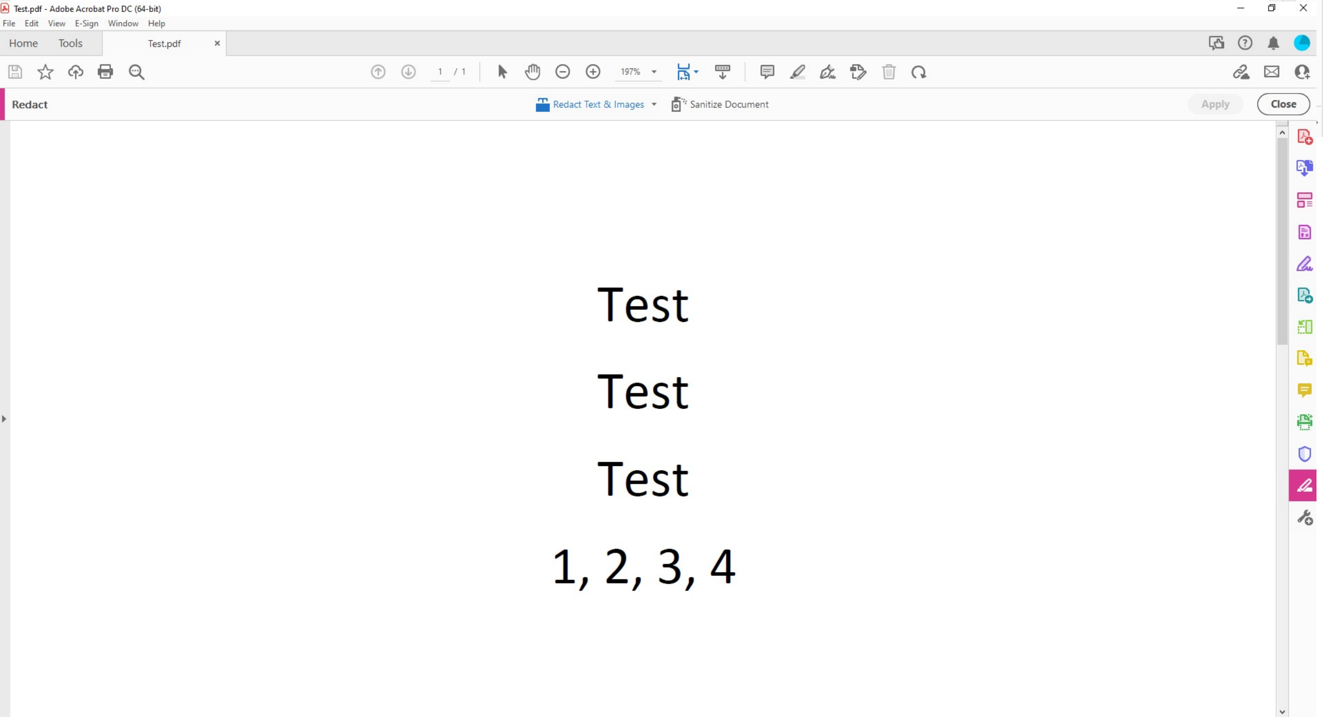
You may also use the following link: https://pipefile.com/dashboard/request/5ee60883a560412ca7b5a580220c60ff

Finally, Grogu has submitted his mandatory disclosure. We are at the deadline to submit it before we get that Motion to Compel.

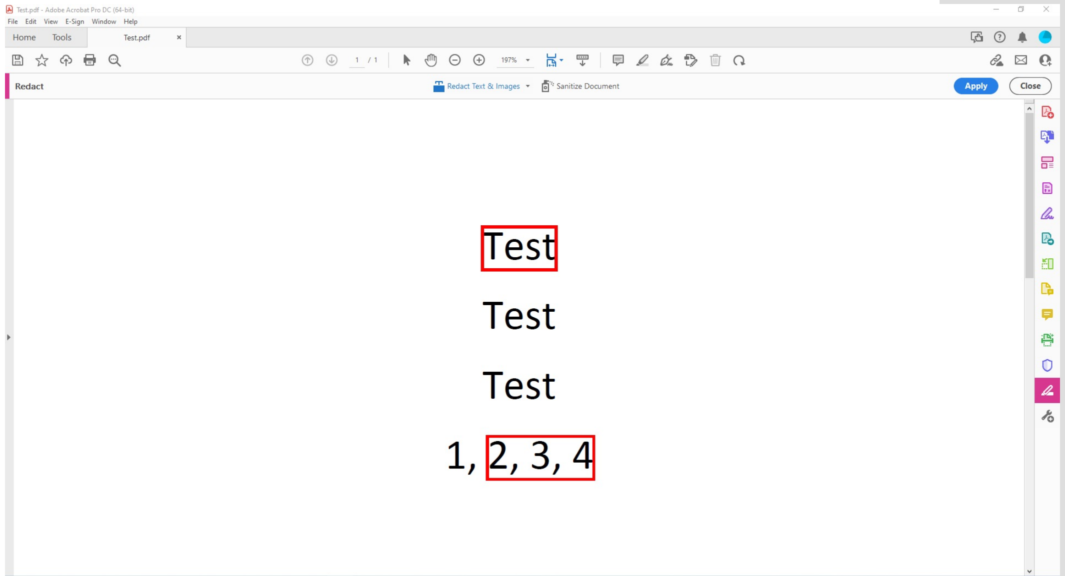
However, to avoid Jabba the Hutt stealing Grogu’s identity, we need to redact his social security information in the event Grogu’s financial disclosure gets entered into evidence.

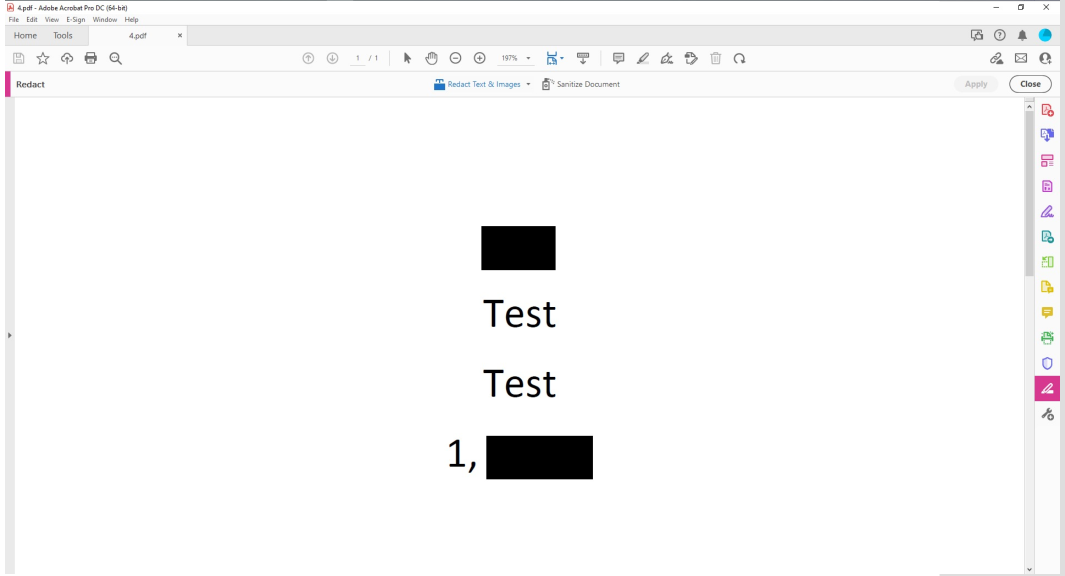
Luckily, Adobe allows us to do this.





Aside from viewing PDFs, Adobe can help us redact sensitive information. Once you have opened your PDF document, there is a small redaction icon you will need to select.



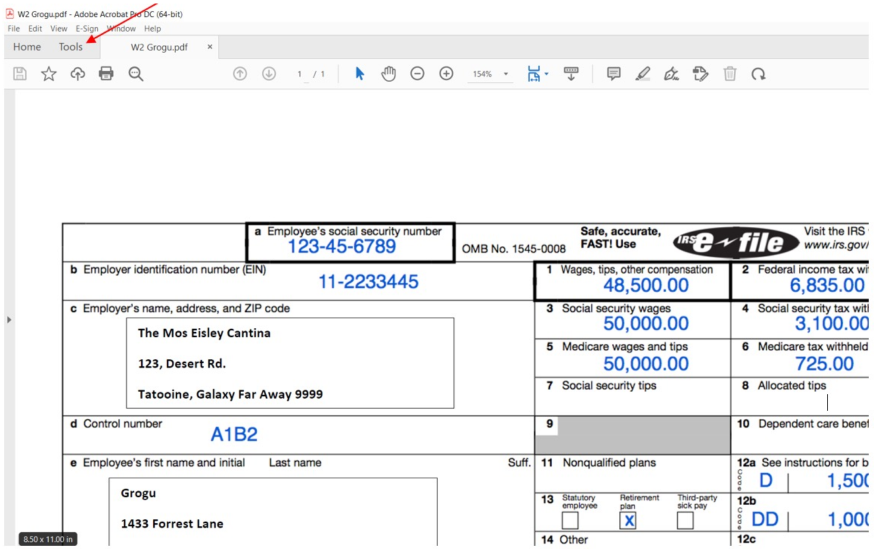


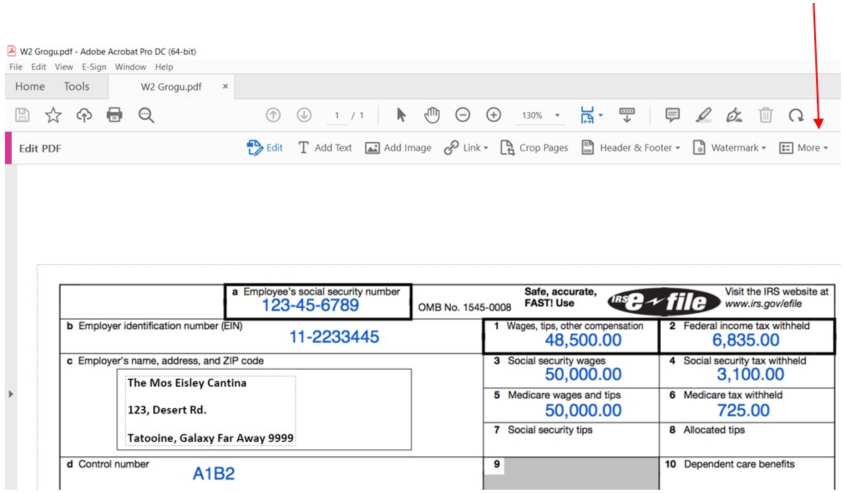
Once you select what you wish to be redacted, a red outlined box will appear around it. Once you have chosen everything you would like redacted, click the “apply” blue icon on the top panel.

Now that you have selected everything you wish to redact, a black box should appear around the information you don’t want Jabba to see. Not only are you being eco-friendly, but this also saves time having to do the old-fashioned way of marking with black marker. Plus, sometimes you can still see the information, so most of the time you will have to copy what you just redacted. Wasting MORE paper!

Bates Stamping

- Ok, so Mando's attorney filed a Motion for Temp Needs. He's alleging that Grogu's pension from the Jedi Council can support the payment on a new spaceship.
- We need to file Grogu's pension statement as an exhibit indicating he cannot afford to support Mando's client, so we need to label it as an exhibit.



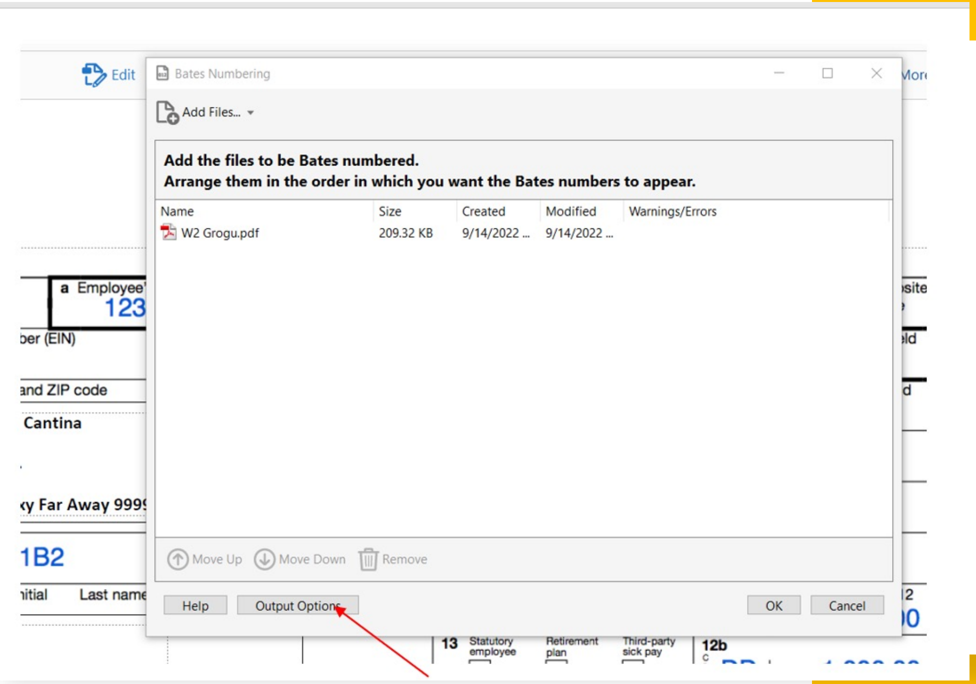


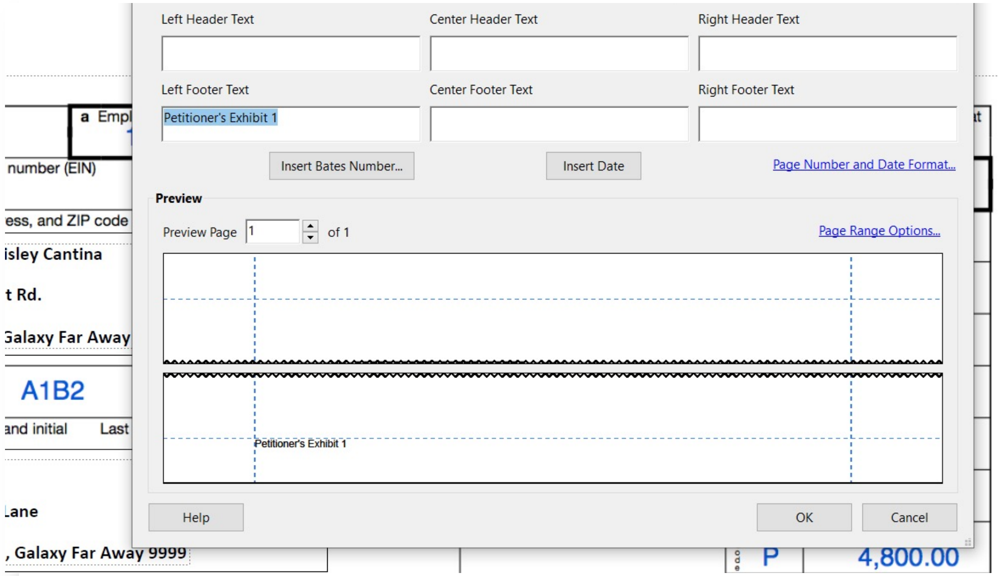
Instead of buying the exhibit tabs from Office Depot, you can easily use Adobe to save you time. Simply click tools, and then edit PDF.

Once you select this, look at the top where it says more, next to “Watermark”.

After clicking more, you should be able to select bates numbering, click Output options, then click Ok twice.

You should now be prompted to a window like this. Where you can now enter what you would like to label your exhibits, and the placement of the text, the size, and font. Here, we are calling this *Petitioner's Exhibit 1.*





Here you can see the finalized document. Ready to be filed with the Clerk.

a Employee's social security number [redacted]6789

OMB No. 1545-0008

Safe, accurate, FAST! Use IRS e-file

Visit the IRS website at www.irs.gov/efile

b Employer identification number (EIN)	11-2233445
c Employer's name, address, and ZIP code	The Mos Eisley Cantina 123, Desert Rd. Tatooine, Galaxy Far Away 9999
d Control number	A1B2
e Employee's first name and initial / Last name / Suff.	Grogu 1433 Forrest Lane Yoda's Planet, Galaxy Far Away 9999
f Employee's address and ZIP code	
1 Wages, tips, other compensation	48,500.00
2 Federal income tax withheld	6,835.00
3 Social security wages	50,000.00
4 Social security tax withheld	3,100.00
5 Medicare wages and tips	50,000.00
6 Medicare tax withheld	725.00
7 Social security tips	
8 Allocated tips	
9	
10 Dependent care benefits	
11 Nonqualified plans	
12a See instructions for box 12	D 1,500.00
12b	DD 1,000.00
12c	P 4,800.00
12d	
13 Statutory employee / Retirement plan / Third-party sick pay	Retirement plan: X
14 Other	

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
PA	1235	50,000	1,535	50,000	750	MU

Form **W-2** **Wage and Tax Statement** 2014

Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

Petitioner's Exhibit 1

Other Popular PDF Editing Programs

- Kofax
- Wondershare

So, your admin staff is taking payments through the credit card machine, but it crashed.

Your paralegal is reviewing Grogu's mandatory disclosure, and

Your office is on the brink of shambles because your office manager is busy making the powerpoint for your Inns of Court presentation.

I think we all know the answer to this.

There's an app for that.

LAWPAY®

AN AFFINIPAY SOLUTION

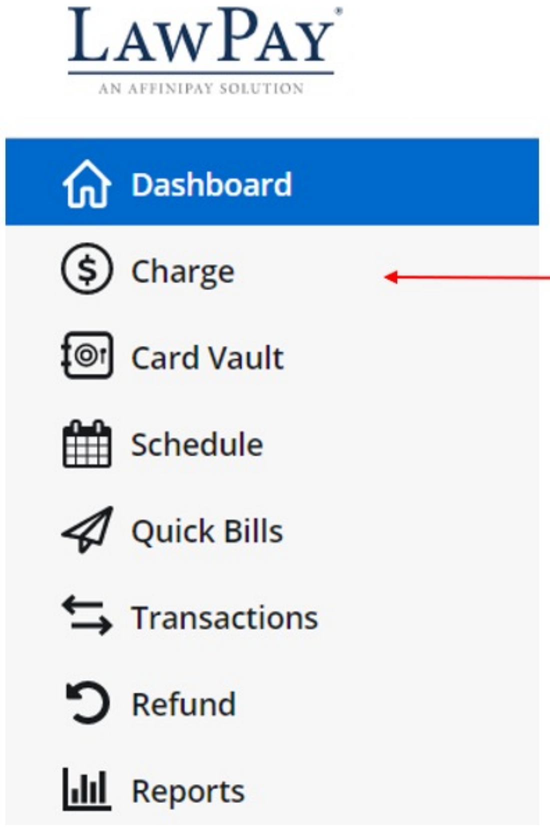
What is LawPay?

LawPay is an online payment system that links directly to your accounts. With a click of a button, clients can pay to retain your office, pay past due amounts, and save credit card information securely.

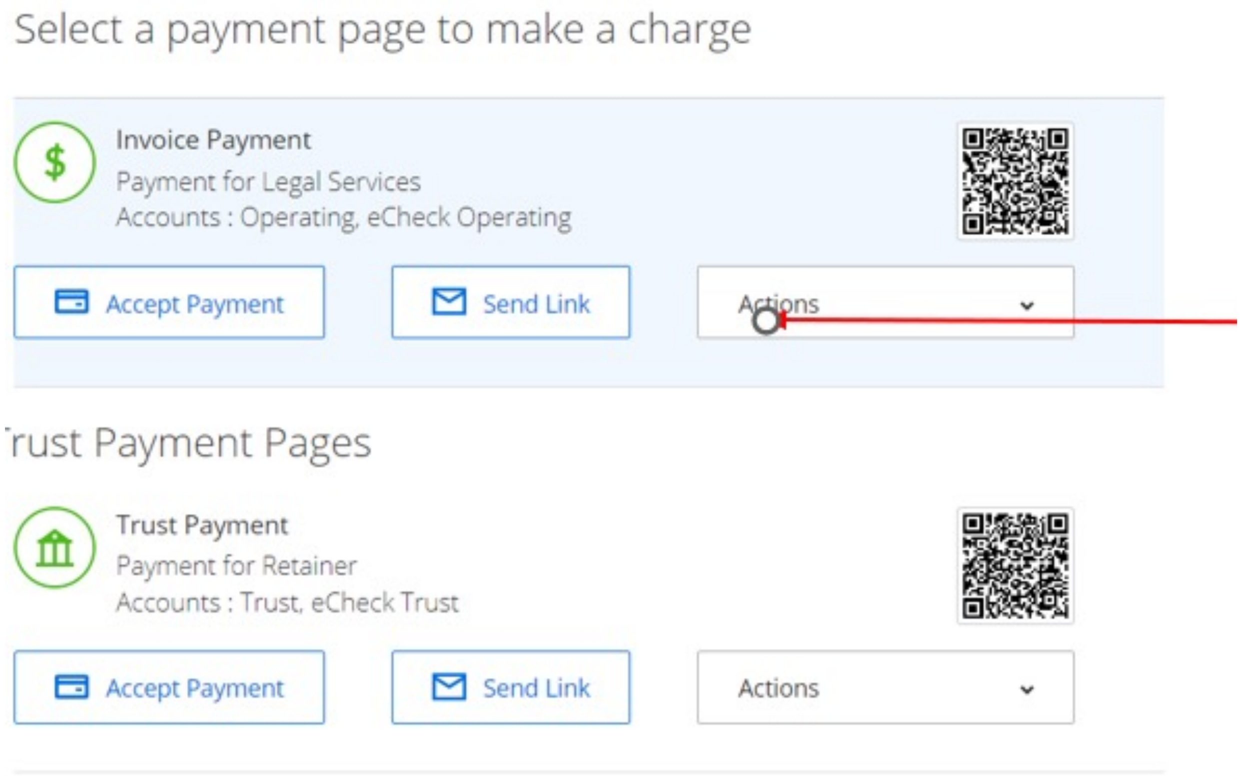
For Family Law firms, clients have the ability to make payments directly to your trust account, or operating account using their cards through a secure link. However, if you wish to save even more money, LawPay also allows clients to make direct payments from their bank accounts to yours.

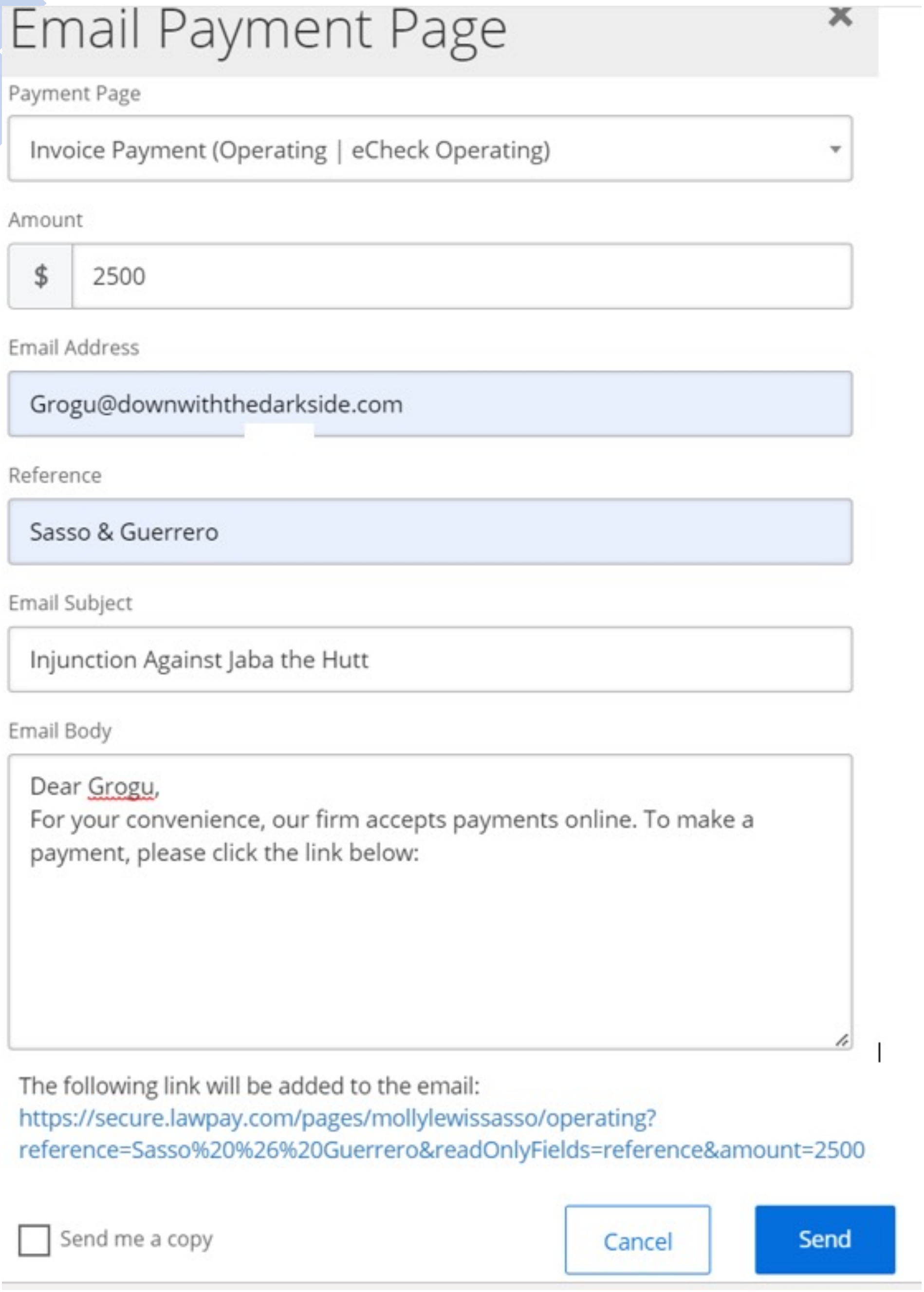
Best of all, LawPay can also be linked with most case management software, such as Clio or mycase. No double accounting! Just link the Lawpay payments to the appropriate case with the click of a button.

Once an account has been created, you should already have links created by LawPay support. To send a payment link you would then click charge.



Then you would select which account, and select “send link.





Once you select the option to send an email, you should be able to send Grogu an email asking him to pay. You can also customize the email they will receive.

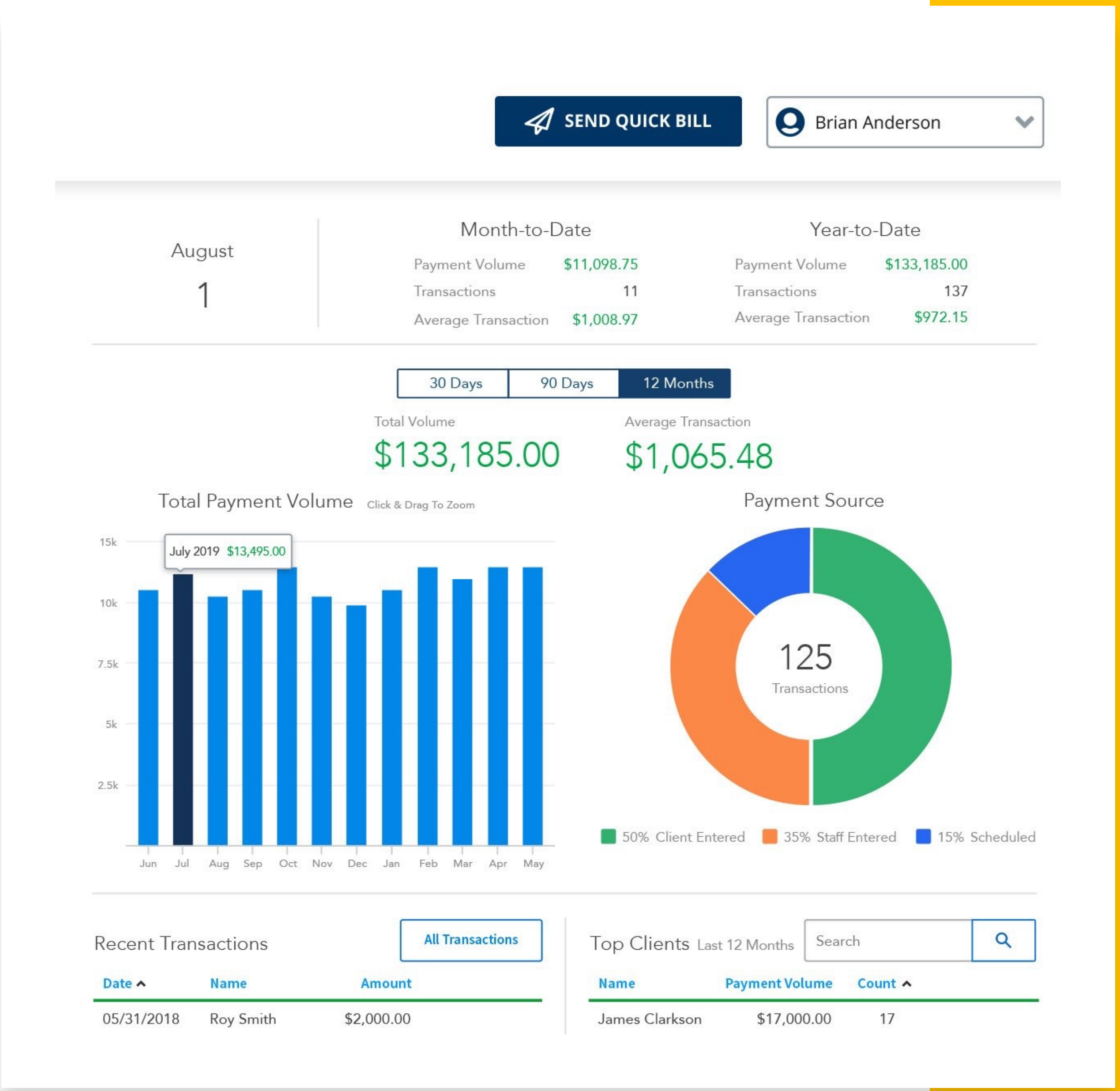
As soon as Grogu has paid, you will get a notification sent to your email indicating he has paid, so you can begin working on his case.

Funds are usually reflected withing 2-3 business days in your bank account.

Law Pay Reports

However, one the most useful qualities LawPay has to offer, is that you can generate reports to view and assist on keeping track of any goals you would like to set.

It’s also very helpful when balancing your accounts, or if you wish to get an overview of all who has paid.



Wlim. (2022, April 1). *Getting your legal bills paid has never been easier, thanks to lawpay*. Above the Law. Retrieved September 14, 2022, from https://abovethelaw.com/2022/03/getting-your-legal-bills-paid-has-never-been-easier-thanks-to-lawpay/