

**NOVA SCOTIA BARRISTERS' SOCIETY  
TECH COMPETENCE CHECKLIST**

**Last Updated on November 23, 2022**

*This checklist has been developed for Nova Scotia lawyers and law practices (the “Law Practice”) in order to assess their own Tech Competence. The emphasis of these questions is on basic technology capabilities that the vast majority of practitioners should be generally familiar with in order to function independently. This is not intended to be an exhaustive list, and in some instances the identified capabilities listed may not be necessary based on the nature of a practice. In order for a practitioner to comply with their professional obligations of tech competence, there could be additional applications or functions where further competence is necessary. (for example, E-Discovery for large Commercial Litigation or Land Registry System for Real Property) Where a practitioner answers “No” to a particular question that is relevant to them based on the nature of their practice it is recommended to seek assistance from others or to search for training videos online (using Youtube or otherwise) to learn the specific capability.*

#	Question	Yes	No
<b>EMAIL (MS OUTLOOK, GMAIL, APPLE MAIL)</b>			
1.	Can you create, send and respond to emails?	<input type="checkbox"/>	<input type="checkbox"/>
2.	Can you attach documents or add hyperlinks to your emails?	<input type="checkbox"/>	<input type="checkbox"/>
3.	Do you maintain a folder or other organizational system for finding emails previously received or sent?	<input type="checkbox"/>	<input type="checkbox"/>
4.	Do you have a system in place to ensure that emails you receive are properly tracked and diarized for follow-up as necessary?	<input type="checkbox"/>	<input type="checkbox"/>
5.	Can you quickly retrieve emails you have sent or received with the ability to associate specific emails with particular clients, matters or projects?	<input type="checkbox"/>	<input type="checkbox"/>
6.	Do you know how to avoid or take steps to prevent malicious email scams, viruses, and phishing attacks from compromising your computer and/or network security?	<input type="checkbox"/>	<input type="checkbox"/>
7.	Can you access your email from your mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
<b>CALENDAR AND SCHEDULING (MS OUTLOOK, GOOGLE CALENDAR, APPLE CALENDAR)</b>			
8.	Can you create, send and accept appointments?	<input type="checkbox"/>	<input type="checkbox"/>
9.	Do you know how to ensure that you are available for meetings or appointments you receive from others?	<input type="checkbox"/>	<input type="checkbox"/>
10.	Can you accept or reject meeting times and propose alternate times based on your availability?	<input type="checkbox"/>	<input type="checkbox"/>



#	Question	Yes	No
11.	Do you have a system in place to ensure that you respond to meeting requests?	<input type="checkbox"/>	<input type="checkbox"/>
12.	Can you track when others have accepted or rejected your appointments and who will attend meetings?	<input type="checkbox"/>	<input type="checkbox"/>
13.	Can you add attachments or links to appointments?	<input type="checkbox"/>	<input type="checkbox"/>
14.	Can you find all future and past scheduled meetings for specific matters or clients?	<input type="checkbox"/>	<input type="checkbox"/>
15.	Can you access your calendar and schedule from a mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
<b>DOCUMENT MANAGEMENT (OPENTEXT EDOCS, NETDOCS, IMANAGE)</b>			
16.	Can you save and access documents in your document management or file folder system where documents are stored?	<input type="checkbox"/>	<input type="checkbox"/>
17.	Can you associate specific documents with particular matters, clients or projects in your document management system and ensure that they are findable later by yourself and others on your team?	<input type="checkbox"/>	<input type="checkbox"/>
18.	Do you use consistent file naming conventions, folders and document types to ensure content is findable for yourself and others?	<input type="checkbox"/>	<input type="checkbox"/>
19.	Can you restrict access to certain individuals to specific documents saved in your document management system? (for example, if a file is screened or an ethical wall is place)	<input type="checkbox"/>	<input type="checkbox"/>
20.	Can you search for specific clients, matters, projects or documents within your document management system?	<input type="checkbox"/>	<input type="checkbox"/>
21.	Can you delete, copy, move and rename documents in your document management or file folder system?	<input type="checkbox"/>	<input type="checkbox"/>
22.	Can you access document backups and restore deleted files?	<input type="checkbox"/>	<input type="checkbox"/>
23.	Can you access documents saved in your document management system from a mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
<b>WORD PROCESSING (MS WORD, GOOGLE DOCS, APPLE PAGES)</b>			
24.	Can you create, edit and save documents?	<input type="checkbox"/>	<input type="checkbox"/>
25.	Can you apply different font styles and formatting to documents?	<input type="checkbox"/>	<input type="checkbox"/>
26.	Can you add cross references or bookmarks to documents?	<input type="checkbox"/>	<input type="checkbox"/>
27.	Can you add numbered and bulleted lists to documents?	<input type="checkbox"/>	<input type="checkbox"/>



#	Question	Yes	No
28.	Can you save multiple different versions of documents and retrieve earlier versions as needed?	<input type="checkbox"/>	<input type="checkbox"/>
29.	Can you generate comparisons or track changes between different versions of documents?	<input type="checkbox"/>	<input type="checkbox"/>
30.	Can you revert back to earlier saved versions of a document?	<input type="checkbox"/>	<input type="checkbox"/>
31.	Can you add, edit and delete footers, headers, page numbers and section break in documents?	<input type="checkbox"/>	<input type="checkbox"/>
32.	Can you remove metadata from confidential documents you draft that might have sensitive details from prior work?	<input type="checkbox"/>	<input type="checkbox"/>
33.	Can you view multiple instances of the same document simultaneously?	<input type="checkbox"/>	<input type="checkbox"/>
<b>TASKS AND BRING-FORWARD SYSTEMS (MS OUTLOOK, TRELLO, MS PLANNER)</b>			
34.	Can you add and edit tasks in your task management system?	<input type="checkbox"/>	<input type="checkbox"/>
35.	Can you set a due date or bring-forward date to your tasks?	<input type="checkbox"/>	<input type="checkbox"/>
36.	Can you assign tasks to others using your task management system?	<input type="checkbox"/>	<input type="checkbox"/>
37.	Does your task management system prompt you when upcoming tasks are due?	<input type="checkbox"/>	<input type="checkbox"/>
38.	Can you associate your tasks with specific matters, clients or projects?	<input type="checkbox"/>	<input type="checkbox"/>
39.	Can you view all past due or upcoming tasks?	<input type="checkbox"/>	<input type="checkbox"/>
40.	Can you search your task management system for tasks?	<input type="checkbox"/>	<input type="checkbox"/>
41.	Can you access your tasks from your mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
<b>CONTACTS</b>			
42.	Can you access, add, delete and edit contact information in your contact management system?	<input type="checkbox"/>	<input type="checkbox"/>
43.	Can you associate contact information with specific projects, matters or clients?	<input type="checkbox"/>	<input type="checkbox"/>
44.	Are you able to access contact information from your mobile devices?	<input type="checkbox"/>	<input type="checkbox"/>
<b>WEB BROWSERS (CHROME, MS EDGE, SAFARI)</b>			



#	Question	Yes	No
45.	Can you open and close web pages and applications?	<input type="checkbox"/>	<input type="checkbox"/>
46.	Can you search for web content using a search engine (like Google)?	<input type="checkbox"/>	<input type="checkbox"/>
47.	Can you bookmark and later find commonly used websites and links?	<input type="checkbox"/>	<input type="checkbox"/>
48.	Can you navigate between different web pages that you currently have open?	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMPUTER NAVIGATION AND SYSTEMS (WINDOWS, MAC, GOOGLE CHROME OS)</b>			
49.	Can you open and close applications on your computer?	<input type="checkbox"/>	<input type="checkbox"/>
50.	Can you switch between different applications on your computer?	<input type="checkbox"/>	<input type="checkbox"/>
51.	Can you search for different applications and files on your computer?	<input type="checkbox"/>	<input type="checkbox"/>
52.	Can you set and change your password to your computer and network?	<input type="checkbox"/>	<input type="checkbox"/>
53.	Can you install, delete and update software installed on your computer?	<input type="checkbox"/>	<input type="checkbox"/>
54.	Can you minimize and maximize windows on your computer?	<input type="checkbox"/>	<input type="checkbox"/>
55.	Can you extend your desktop to multiple monitors?	<input type="checkbox"/>	<input type="checkbox"/>
56.	Can you lock your screen while away from your computer?	<input type="checkbox"/>	<input type="checkbox"/>
57.	Can you troubleshoot issues with your computer? (hint: start by turning it off and on)	<input type="checkbox"/>	<input type="checkbox"/>
<b>VIDEO CONFERENCING (ZOOM, MS TEAMS)</b>			
58.	Can you open and access video conference links shared with you?	<input type="checkbox"/>	<input type="checkbox"/>
59.	Can you create new video conferences and sending invites to others?	<input type="checkbox"/>	<input type="checkbox"/>
60.	Can you turn your video and microphone on and off?	<input type="checkbox"/>	<input type="checkbox"/>
61.	Can you share and unshare your screen with other participants?	<input type="checkbox"/>	<input type="checkbox"/>
62.	Can you raise and unraise your hand?	<input type="checkbox"/>	<input type="checkbox"/>



#	Question	Yes	No
63.	Can you change your background?	<input type="checkbox"/>	<input type="checkbox"/>
64.	Can you participate in a chat?	<input type="checkbox"/>	<input type="checkbox"/>
<b>SPREADSHEETS (MS EXCEL, GOOGLE SHEETS)</b>			
65.	Can you perform basic calculations and use formulas in a spreadsheet application? (like Excel or Google Sheets)	<input type="checkbox"/>	<input type="checkbox"/>
66.	Can you create charts based on spreadsheet data?	<input type="checkbox"/>	<input type="checkbox"/>
67.	Can you navigate to the different tabs in a spreadsheet?	<input type="checkbox"/>	<input type="checkbox"/>
68.	Can you format a spreadsheet to be printed?	<input type="checkbox"/>	<input type="checkbox"/>
69.	Can you enter and modify the content of cells in a spreadsheet?	<input type="checkbox"/>	<input type="checkbox"/>
70.	Can you filter and search for content in a spreadsheet?	<input type="checkbox"/>	<input type="checkbox"/>
<b>PRESENTATIONS (MS POWERPOINT, GOOGLE SLIDES, KEYNOTE)</b>			
71.	Can you create and modify the content of different slides in a presentation?	<input type="checkbox"/>	<input type="checkbox"/>
72.	Can you launch a presentation file in presentation mode?	<input type="checkbox"/>	<input type="checkbox"/>
73.	Can you add notes to your slides in a presentation?	<input type="checkbox"/>	<input type="checkbox"/>
74.	Can you switch between different slides in a presentation?	<input type="checkbox"/>	<input type="checkbox"/>
75.	Can you add basic animation to a presentation?	<input type="checkbox"/>	<input type="checkbox"/>
76.	Can you insert images, clipart and hyperlinks into a presentation?	<input type="checkbox"/>	<input type="checkbox"/>
<b>PDFS (ADOBE, POWER PDF)</b>			
77.	Can you create PDFs from existing documents in other applications?	<input type="checkbox"/>	<input type="checkbox"/>
78.	Can you assemble multiple different PDFs into a single PDF?	<input type="checkbox"/>	<input type="checkbox"/>
79.	Can you create bookmarks and hyperlinks within a PDF?	<input type="checkbox"/>	<input type="checkbox"/>



#	Question	Yes	No
80.	Can you search for specific text within a PDF?	<input type="checkbox"/>	<input type="checkbox"/>
81.	Can you add fields to a PDF to make it a fillable form?	<input type="checkbox"/>	<input type="checkbox"/>
82.	Can you make the text in a PDF searchable? (using OCR or Optical Character Recognition)	<input type="checkbox"/>	<input type="checkbox"/>
<b>PRINTING</b>			
83.	Can you print documents?	<input type="checkbox"/>	<input type="checkbox"/>
84.	Can you select different printers to print from? (including to PDF)	<input type="checkbox"/>	<input type="checkbox"/>
85.	Can you select which pages of a document to print?	<input type="checkbox"/>	<input type="checkbox"/>
86.	Can you select whether your document will print in landscape or portrait mode?	<input type="checkbox"/>	<input type="checkbox"/>
87.	Can you cause documents to print single or double sided?	<input type="checkbox"/>	<input type="checkbox"/>
88.	Can you select different paper sizes and printer output bins?	<input type="checkbox"/>	<input type="checkbox"/>
89.	Can you load a printer with paper?	<input type="checkbox"/>	<input type="checkbox"/>
90.	Can you resolve basic printer jams?	<input type="checkbox"/>	<input type="checkbox"/>
<b>PRACTICE/CASE MANAGEMENT (AMICUS, CLIO, PRACTICE PANTHER)</b>			
91.	Can you add new projects, matters or clients to your practice/case management software?	<input type="checkbox"/>	<input type="checkbox"/>
92.	Can you grant others with access to specific projects, matters or clients in your practice/case management software?	<input type="checkbox"/>	<input type="checkbox"/>
93.	Can you access a list of all projects, matters or clients that you have worked on in your practice/case management software?	<input type="checkbox"/>	<input type="checkbox"/>
94.	Can you access all content (documents, emails, notes, contacts, etc) relating to a particular project, matter or client from your practice/case management software?	<input type="checkbox"/>	<input type="checkbox"/>
95.	Can you add and update content within your practice/case management software?	<input type="checkbox"/>	<input type="checkbox"/>
<b>SCANNING</b>			
96.	Can you scan a document and access it digitally?	<input type="checkbox"/>	<input type="checkbox"/>



#	Question	Yes	No
97.	Can you scan both a single and double-sided document?	<input type="checkbox"/>	<input type="checkbox"/>
98.	Can you save a scanned document to your document management system?	<input type="checkbox"/>	<input type="checkbox"/>
99.	Can you attach a scanned document to an email?	<input type="checkbox"/>	<input type="checkbox"/>
<b>MOBILE DEVICES</b>			
100.	Can you connect your mobile devices to your network?	<input type="checkbox"/>	<input type="checkbox"/>
101.	Can you install, delete and update applications on your mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
102.	Can you review and mark-up documents on your mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
103.	Can you set and change a password on your mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
<b>INTERNET AND NETWORKS</b>			
104.	Can you connect your devices to the Internet? (Wi-Fi and cellular data)	<input type="checkbox"/>	<input type="checkbox"/>
105.	Are you familiar with best practices regarding the use of public Wi-Fi in order to keep confidential information inaccessible to others?	<input type="checkbox"/>	<input type="checkbox"/>
106.	Can you connect to your office network while working remotely?	<input type="checkbox"/>	<input type="checkbox"/>
<b>DIGITAL SIGNATURES (DOCUSIGN)</b>			
107.	Can you digitally sign a document from your computer or mobile device?	<input type="checkbox"/>	<input type="checkbox"/>
108.	Can you deliver a document to others for signing using a digital signature application?	<input type="checkbox"/>	<input type="checkbox"/>
109.	Can you later access a digitally signed document once executed?	<input type="checkbox"/>	<input type="checkbox"/>
110.	Can you deliver a digitally signed document to others?	<input type="checkbox"/>	<input type="checkbox"/>
<b>CLOUD BASED TOOLS</b>			
111.	Do you know how to keep your documents and other confidential materials secure in a cloud-based tool?	<input type="checkbox"/>	<input type="checkbox"/>
112.	Can you access any cloud-based tools from your computer and mobile devices?	<input type="checkbox"/>	<input type="checkbox"/>



#	Question	Yes	No
113.	Can you share cloud-based content with others and set appropriate permission levels to such content?	<input type="checkbox"/>	<input type="checkbox"/>
<b>TIME ENTRY (ITIMEKEEP, PROLAW)</b>			
114.	Can you track your time and associate it with a particular matter, client or project in your time tracking software?	<input type="checkbox"/>	<input type="checkbox"/>
115.	Can you add a narrative description, date and task/phase code (if needed) to an entry in your time tracking software?	<input type="checkbox"/>	<input type="checkbox"/>
116.	Can you make edits to your time entries?	<input type="checkbox"/>	<input type="checkbox"/>
<b>FINANCIAL MANAGEMENT (ADERANT, 3E, CLIO)</b>			
117.	Can you generate a bill/invoice and revise as necessary prior to delivery to a client or other third party?	<input type="checkbox"/>	<input type="checkbox"/>
118.	Can you track your hours, work in progress, accounts receivable, and disbursements on a specific matter, client or project?	<input type="checkbox"/>	<input type="checkbox"/>
119.	Can you develop budgets or estimates for specific matters, clients or projects?	<input type="checkbox"/>	<input type="checkbox"/>
120.	Can you generate financial reports relating to your practice, matters, clients or projects?	<input type="checkbox"/>	<input type="checkbox"/>
121.	Can you generate invoices with alternate hourly rates or pricing structures in place?	<input type="checkbox"/>	<input type="checkbox"/>
<b>RESEARCH</b>			
122.	Can you research case law, statutes and regulations by topic or legal issue?	<input type="checkbox"/>	<input type="checkbox"/>
123.	Can you find a specific case based on its citation?	<input type="checkbox"/>	<input type="checkbox"/>
124.	Can you find a specific statute or regulation?	<input type="checkbox"/>	<input type="checkbox"/>