

Proposed standard:

As part of a lawyer's obligation to perform all legal services undertaken on a client's behalf to the standard of a competent lawyer, they should develop an understanding of, and ability to use, technology relevant to the nature and area of their practice and responsibilities.¹

Lawyers and law firms should understand the benefits and risks associated with relevant technology² and must recognize their ethical duty³ and legal obligations⁴ to protect confidential information.

Commentary (below the line):

Assessing Technological Competence

A lawyer's required level of technological competence will depend upon whether the use or understanding of technology is necessary to the nature and area of the lawyer's practice and responsibilities and whether the relevant technology is reasonably available to the lawyer. In determining whether technology is reasonably available, consideration should be given to factors including:

- The lawyer's or law firm's practice areas;
- The geographic locations of the lawyer's or firm's practice; and
- The requirements of clients.

Tech Competence Checklist

To assist lawyers in assessing whether they are able to fulfill their obligations of technological competence a [Tech Competence Checklist](#) has been developed. The checklist is structured as a series of questions on basic technology capabilities that the vast majority of lawyers 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. Once a lawyer has completed the Checklist, it is recommended to review all questions with a "No" answer and to utilize the following list of external resources and training materials to address any such knowledge gaps. The following list of resources has been organized to coincide with the sections contained within the Checklist.

¹ Rule 3.1-1 (Competence) of the Nova Scotia Barristers' Society, **Code of Professional Conduct**, Halifax: Nova Scotia Barristers' Society, 2012 ("the Code") and specifically, Commentary 4A.

² Rule 3.1-1, Commentary 4A of the Code.

³ Rule 3.3 of the Code (Confidentiality).

⁴ Schedule 1 (Section 5), "Principles Set Out in the National Standard of Canada Entitled Model Code for the Protection of Personal Information, CAN/CSA-Q830-96," *Personal information Protection and Electronic Documents Act*, S.C. 200, c. 5; available online: <https://laws-lois.justice.gc.ca/eng/acts/p-8.6/page-7.html>

Tech Competence Resources

1. EMAIL (OUTLOOK; GMAIL; APPLE MAIL)

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| "Best practices for Outlook" | https://support.microsoft.com/en-us/office/best-practices-for-outlook-f90e5f69-8832-4d89-95b3-bfdf76c82ef8 |
| "How to encrypt email in Outlook" | https://support.microsoft.com/en-us/office/encrypt-email-messages-373339cb-bf1a-4509-b296-802a39d801dc |
| "How to send secure email in Outlook" | https://trustifi.com/how-to-send-secure-email-in-outlook/ |
| "How to Organize Your Inbox in Outlook" | https://www.lifewire.com/create-folders-outlook-com-1170657 |
| "8 TIPS FOR SMARTER COMMUNICATIONS WITH OUTLOOK" | https://tomorrowsva.com/8-tips-for-smarter-communications-with-outlook/ |
| "Organize your inbox: using Outlook for Email Management" | https://support.microsoft.com/en-us/office/organize-your-inbox-9aea8ad7-883d-459b-a3ea-ae20f06cfb32 |
| "Microsoft Outlook for Legal Professionals" | https://www.lawtechnologytoday.org/2021/08/microsoft-outlook-for-legal-professionals/ |
| "iCloud Mail User Guide" | https://support.apple.com/en-ca/guide/mail/welcome/mac |
| "iCloud Mail: Set up an email alias" | https://support.apple.com/en-us/HT201771 |
| "iCloud Mail: Add an email signature" | https://support.apple.com/en-ca/guide/icloud/mm6b1a3290/icloud |
| "iCloud Mail: use rules to manage your inbox:" | https://support.apple.com/en-ca/guide/icloud/mm6b1a3f8a/icloud |
| "iCloud Mail: Forward email to another account" | https://support.apple.com/en-ca/guide/icloud/mm6b1a3960/icloud |

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| "iCloud Mail: delete and recover emails in Mail on iPhone" | https://support.apple.com/en-ca/guide/iphone/iphb02be90ba/ios |
| "iCloud Mail: Make a sender a VIP in Mail on iCloud.com" | https://support.apple.com/en-ca/guide/icloud/mma27f86124d/icloud |
| "iCloud Mail: Use Mail Drop to send large files" | https://support.apple.com/en-ca/guide/icloud/mm6b1a7a10/icloud |
| "iCloud Mail: Use Markup in Mail" | https://support.apple.com/en-ca/guide/mail/mlhl98889a61/mac |
| "iCloud Mail: Use iCloud Mail with non-Apple email clients" | https://support.apple.com/en-ca/HT202304 |

2. CALENDAR and SCHEDULING (OUTLOOK; GOOGLE CALENDAR; APPLE CALENDAR)

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| "Introduction to the Outlook Calendar" | https://support.microsoft.com/en-us/office/introduction-to-the-outlook-calendar-d94c5203-77c7-48ec-90a5-2e2bc10bd6f8 |
| "Outlook Quick Start Guide" | https://www.customguide.com/cheat-sheet/outlook-quick-reference.pdf |
| "How to Use Outlook for Project Management" | https://www.makeuseof.com/use-microsoft-outlook-for-project-management/ |
| "Google Calendar Help Center" | https://support.google.com/calendar/?hl=en#topic=10509740 |
| "Google Calendar Keyboard Shortcuts" | https://support.google.com/calendar/answer/37034?hl=en |
| "24 Google Calendar Hacks" | https://www.productiveblogging.com/google-calendar-hacks/ |
| "The Ultimate Guide to" | https://www.calendar.com/google-calendar-guide/ |

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| Google Calendar” | |
| “How to Sync Google Calendar with Other Calendars” | https://www.dummies.com/article/technology/notable-websites/google/how-to-sync-multiple-calendars-using-google-calendar-142877/ |
| “The ultimate Apple Calendar user guide” | https://calendly.com/blog/apple-calendar |
| “Apple Calendar: The Ultimate Guide” | https://savvyca.com/articles/apple-calendar/ |
| “10 Tips for Mastering Apple Calendar” | https://www.pcmag.com/how-to/10-tips-for-mastering-apple-calendar |
| “10 gotta-know calendar tips for iOS” | https://www.macworld.com/article/225601/10-gotta-know-calendar-tips-for-ios.html |

3. DOCUMENT MANAGEMENT) OPEN TEXT EDOCS; NETDOCS; IMANAGE)

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| “10 gotta-know calendar tips for iOS” | https://www.macworld.com/article/225601/10-gotta-know-calendar-tips-for-ios.html |
| “11 ideas for how to organize digital files” | https://www.microsoft.com/en-us/microsoft-365/business-insights-ideas/resources/11-ideas-for-how-to-organize-digital-files |
| “Best document management software (2023” | https://www.techradar.com/best/best-document-management-software |
| “A Beginner's Guide to Digital | https://www.fool.com/the-ascent/small-business/document-management/articles/business-document-management/ |

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| Document Management": | |
| "Digital Tools for Lawyers: a Complete Beginner's Guide" | https://blog.avoteca.com/articles/en/a-complete-beginners-guide-to-digital-tools-for-lawyers/ |
| "The Best Document Management Systems" | https://www.pcmag.com/picks/the-best-document-management-software |
| "The Difference Between "Digital" & "Electronic" Documents" | https://tiekinetix.com/en/blog/difference-between-digital-electronic-documents |
| "Legal Document Management Software: The Complete Guide" | https://www.altfeeco.com/resources/legal-document-management-software |
| "Document management system" | https://en.wikipedia.org/wiki/Document_management_system |
| "Top 8 Small Business Document Management Software (Industry Best Picks)" | https://www.softtr.io/blog/small-business-document-management |
| "A Beginner's Guide to Document Management" | https://www.techopedia.com/definition/23384/document-management |
| "About iManage" | https://imanager.com/about/about-imanager/ |
| "The In-House Counsel Guide To Active Legal" | https://www.zylab.com/en/blog/the-in-house-counsel-guide-to-active-legal-document-management-software |

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| Document Management Software | |
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4. WORD PROCESSING (MS WORD, GOOGLE DOCS, APPLE PAGES)

| MS Word | |
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| Word for Windows training | https://support.microsoft.com/en-us/office/word-for-windows-training-7bcd85e6-2c3d-4c3c-a2a5-5ed8847eae73 |
| "Word help & learning" | https://support.microsoft.com/en-us/word |
| "Customize or create new styles" | https://support.microsoft.com/en-us/office/customize-or-create-new-styles-d38d6e47-f6fc-48eb-a607-1eb120dec563 |
| "Keyboard shortcuts in Word" | https://support.microsoft.com/en-us/office/keyboard-shortcuts-in-word-95ef89dd-7142-4b50-afb2-f762f663ceb2 |
| "How to create templates in Microsoft Word for legal documents" | https://www.onelegal.com/blog/how-to-create-templates-in-microsoft-word-for-legal-documents/ |
| "16 Microsoft Word Tips and Tricks to Work Faster and Smarter" | https://www.meridianoutpost.com/resources/articles/tips-and-tricks-microsoft-word.php |
| "Top 13 Microsoft Word Tips for Lawyers" | https://www.clio.com/blog/microsoft-word-hacks-every-lawyer-should-know/ |
| "Microsoft Word for Lawyers (Step-by-Step Walkthrough)" | https://www.youtube.com/watch?v=RvKHWAXbWaU |
| Google Docs | |
| Google Docs Tutorial for Beginners | https://helpdeskgeek.com/how-to/how-to-use-google-docs-a-beginners-guide/ |

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| Google Docs Help Center | https://support.google.com/docs/#topic=1382883 |
| "Keyboard shortcuts for Google Docs" | https://support.google.com/docs/answer/179738?hl=en&co=GENIE.Platform%3DDesktop |
| "How to Collaborate in Google Docs" | https://zapier.com/blog/how-to-collaborate-google-docs/ |
| Apple Pages | |
| Apple Pages Support | https://support.apple.com/pages |
| "Use templates in Pages on Mac" | https://support.apple.com/en-ca/guide/pages/tan5c52a733c/mac |
| "The 10 Best Tips for Apple Pages in 2023" | https://www.lifewire.com/best-tips-for-apple-pages-app-4688650 |

5. TASKS and BRING-FORWARD SYSTEMS (MS OUTLOOK, TRELLO, MS PLANNER)

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| Microsoft Planner | https://www.microsoft.com/en-ca/microsoft-365/business/task-management-software |
| "Manage your tasks in Microsoft Planner" | https://support.microsoft.com/en-us/office/manage-your-tasks-in-microsoft-planner-7e3d66b4-684d-4a2f-8fbe-908c614d8314 |
| "MS Outlook: How to Use Task Management Effectively" | https://www.lifewire.com/how-to-use-task-management-in-outlook-1173685 |
| "Use Tasks in Outlook" | https://support.microsoft.com/en-us/office/use-tasks-in-outlook-com-6e8a991b-ea62-4009-a7f7-62b70a57ec18 |
| "How To Use Tasks In Outlook To Stay Organized (With Tips)" | https://www.indeed.com/career-advice/career-development/how-to-use-tasks-in-outlook |
| "When to use Microsoft Project, Planner, To Do, or the Tasks app in Teams" | https://support.microsoft.com/en-us/office/when-to-use-microsoft-project-planner-to-do-or-the-tasks-app-in-teams-8f950d32-d5f4-40db-a8b7-4d1b82b55e17 |

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| "Trello for small law firms" | https://blog.trello.com/how-palace-law-uses-trello |
| "How to organize Trello Boards as a Law firm" | https://community.atlassian.com/t5/Trello-questions/How-to-organize-Trello-Boards-as-a-Law-firm/gaq-p/2083644 |
| "Trello: a template for client workflow management" | https://trello.com/templates/project-management/client-workflow-management-GHFaoLVc |

6. CONTACTS

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| Google Contacts Help Center | https://support.google.com/contacts/ |
| "The ultimate guide to Android contacts management" | https://www.computerworld.com/article/3679708/android-contacts-management-ultimate-guide.html |
| "How to organize your contacts like a pro on Android" | https://www.nextpit.com/how-to-organize-your-contacts-on-android |
| "How to Manage Contacts on Your iPhone" | https://www.lifewire.com/manage-contacts-on-iphone-578642 |
| "Add and use contact information on iPhone" | https://support.apple.com/en-ca/guide/iphone/iph3e0ca2db/ios |
| "Manage your contacts in Outlook for Windows" | https://support.microsoft.com/en-us/office/manage-your-contacts-in-outlook-for-windows-f03681a5-fe07-4f2c-bee6-d93d8fab0c00 |

7. COMPUTER NAVIGATION and SYSTEMS (WINDOWS, MAC, GOOGLE CHROME OS)

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| Google Search Guide | https://support.google.com/websearch/answer/134479?hl=en |
| Google Scholar: the ultimate guide | https://paperpile.com/g/google-scholar-guide/ |

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| Google Chrome: Create, view & edit bookmarks | https://support.google.com/chrome/answer/188842?hl=en&co=GENIE.Platform=Desktop |
| “Bing Advanced Search Tricks You Should Know” | https://www.lifewire.com/bing-advanced-search-3482817 |
| “Bing Search Tips and Tricks to improve Search Experience” | https://www.thewindowsclub.com/bing-search-tips-and-tricks |
| Safari User Guide | https://support.apple.com/en-ca/guide/safari/welcome/mac |
| Safari: Bookmarks | https://support.apple.com/en-ca/guide/iphone/iph42ab2f3a7/ios |
| DuckDuckGo | https://duckduckgo.com/ |
| Firefox: Learn the Basics | https://support.mozilla.org/en-US/products/firefox/get-started |
| Firefox: Bookmarks | https://support.mozilla.org/en-US/kb/bookmarks-firefox |
| FindLaw | https://www.findlaw.com/ |

8. COMPUTER NAVIGATION and SYSTEMS (WINDOWS, MAC, GOOGLE CHROME OS)

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| Microsoft Community (Guide to Windows and Other Microsoft Products) | https://answers.microsoft.com/en-us |
| Windows help & learning | https://support.microsoft.com/en-us/windows |
| “Quick Start Guides for Windows 10, Surface Book, and Microsoft Edge” | https://support.microsoft.com/en-us/microsoft-edge/quick-start-guides-for-windows-10-surface-book-and-microsoft-edge-4e603411-16ad-73f7-0923-5aa3d327bb59 |

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| "20 tips and tricks for Windows 11" | https://www.techradar.com/news/20-tips-and-tricks-for-windows-11 |
| "How to use multiple monitors in Windows" | https://support.microsoft.com/en-us/windows/how-to-use-multiple-monitors-in-windows-329c6962-5a4d-b481-7baa-bec9671f728a |
| "How to Use Multiple Monitors to Be More Productive" | https://www.howtogeek.com/174452/beginner-geek-how-to-use-multiple-monitors-to-be-more-productive/ |
| "Change or reset your Windows password" | https://support.microsoft.com/en-us/windows/change-or-reset-your-windows-password-8271d17c-9f9e-443f-835a-8318c8f68b9c |
| macOS User Guide | https://support.apple.com/en-ca/guide/mac-help/welcome/mac |
| ChromeOS | https://www.google.com/chromebook/chrome-os/ |
| "The Verge guide to Chrome OS and Chromebooks" | https://www.theverge.com/2019/11/4/18514843/google-chromebook-os-how-to-app-customize |
| "Multi-Factor Authentication: Who Has It and How to Set It Up" | https://www.pcmag.com/how-to/multi-factor-authentication-2fa-who-has-it-and-how-to-set-it-up |

9. VIDEO CONFERENCING (ZOOM, MS TEAMS)

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| Microsoft Teams – Introduction | https://support.microsoft.com/en-us/office/get-started-with-microsoft-teams-b98d533f-118e-4bae-bf44-3df2470c2b12?wt.mc_id=otc_microsoft_teams# |
| Microsoft Teams – Training | https://support.microsoft.com/en-us/office/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7 |
| Microsoft Teams – Quick Start | https://learn.microsoft.com/en-us/microsoftteams/get-started-with-teams-quick-start |
| "21 Microsoft Teams Tips and Tricks" | https://www.ntiva.com/blog/microsoft-teams-tips-and-tricks |

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| Tricks the Experts Rely On” | |
| Teams for Beginners (Videos) | https://www.bing.com/videos/search?q=teams+for+beginners&qpv=teams+for+beginners&FORM=VDRE |
| Zoom – Introduction and Getting Started | https://support.zoom.us/hc/en-us/articles/360034967471-Getting-started-guide-for-new-users |
| Zoom - Rooms User Guide | https://support.zoom.us/hc/en-us/articles/204772869-Zoom-Rooms-User-Guide |
| “The complete Zoom guide: From basic help to advanced tips and tricks” | https://www.zdnet.com/article/zoom-101-a-starter-guide-for-beginners-plus-advanced-tips-and-tricks-for-pros/ |
| “18 Zoom tips and tricks for better video meetings” | https://zapier.com/blog/zoom-tips/ |

10. SPREADSHEETS (MS EXCEL, GOOGLE SHEETS)

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| “Excel help and learning” | https://support.microsoft.com/en-us/excel |
| “Basic tasks in Excel” | https://support.microsoft.com/en-us/office/basic-tasks-in-excel-dc775dd1-fa52-430f-9c3c-d998d1735fca |
| “Keyboard shortcuts in Excel” | https://support.microsoft.com/en-us/office/keyboard-shortcuts-in-excel-1798d9d5-842a-42b8-9c99-9b7213f0040f |
| “Excel functions (by category)” | https://exceljet.net/formulas |
| “Overview of Excel tables” | https://support.microsoft.com/en-us/office/overview-of-excel-tables-7ab0bb7d-3a9e-4b56-a3c9-6c94334e492c |
| “Create a PivotTable to analyze worksheet data” | https://support.microsoft.com/en-us/office/create-a-pivottable-to-analyze-worksheet-data-a9a84538-bfe9-40a9-a8e9-f99134456576 |
| “How to use Google Sheets” | https://support.google.com/docs/answer/6000292?hl=en&context=GENIE.Platform=Desktop |

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| "The Beginner's Guide to Google Sheets" | https://www.howtogeek.com/425040/the-beginners-guide-to-google-sheets/ |
| Numbers for Mac | https://www.apple.com/numbers/ |
| Smartsheet | https://www.smartsheet.com/ |

11. PRESENTATIONS (MS POWERPOINT, GOOGLE SLIDES, KEYNOTE)

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| "PowerPoint for Windows training" | https://support.microsoft.com/en-us/office/powerpoint-for-windows-training-40e8c930-cb0b-40d8-82c4-bd53d3398787 |
| "A beginner's guide to Microsoft Powerpoint" | https://www.canto.com/blog/how-to-use-microsoft-powerpoint/ |
| "Get started with PowerPoint for the web" | https://support.microsoft.com/en-us/office/get-started-with-powerpoint-for-the-web-6303da7a-402a-4300-8b1c-160e8940cc34 |
| "Find the perfect PowerPoint presentation template" | https://create.microsoft.com/en-us/powerpoint-templates |
| "Basic tasks for creating a PowerPoint presentation" "Play music across multiple slides in your slide show" | https://support.microsoft.com/en-us/office/basic-tasks-for-creating-a-powerpoint-presentation-efbbc1cd-c5f1-4264-b48e-c8a7b0334e36 https://support.microsoft.com/en-us/office/play-music-across-multiple-slides-in-your-slide-show-b01ded6a-28c8-473a-971a-6dfa92cc9367#:~:text=On%20the%20Insert%20tab%2C%20select,tab%2C%20select%20Play%20in%20Background. |
| "How to Make a Flowchart in PowerPoint" | https://www.free-power-point-templates.com/articles/how-to-create-flowcharts-in-powerpoint/ |
| "Google Slides Training and Help" | https://support.google.com/a/users/answer/9282488?hl=en |

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| "10 quick tips to spice up your Google Slides presentations" | https://airtame.com/blog/google-slides-tips/ |
| "How to add audio to Google Slides" | https://speechify.com/blog/how-to-add-audio-google-slides/?landing_url=https%3A%2F%2Fspeechify.com%2Fblog%2Fhow-to-add-audio-google-slides%2F |
| "Keynote User Guide" | https://support.apple.com/en-ca/guide/keynote/welcome/mac |
| "How to Use Apple Keynote (Ultimate Tutorial Guide)" | https://business.tutsplus.com/series/how-to-use-apple-keynote-ultimate-tutorial-guide-cms-1295 |
| "10 Expert Tips to Create and Deliver a Killer Keynote Presentation" | https://piktochart.com/blog/tips-keynote-presentation/ |

12. PDFS (ADOBE, POWER PDF)

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| Adobe Acrobat | https://acrobat.adobe.com/us/en/acrobat.html |
| Power PDF | https://www.kofax.com/Products/power-pdf |
| Nitro PDF | https://www.gonitro.com/ |
| PDF-XChange Editor | https://www.tracker-software.com/product/pdf-xchange-editor |
| Foxit PhantomPDF | https://www.foxitsoftware.com/pdf-editor/ |
| SimpleOCR | https://www.simpleocr.com/ |
| Readiris | https://www.irislink.com/EN-US/c1696/Readiris-16-OCR-Software.aspx |
| "How to Convert a Microsoft Word Document to a PDF" | https://www.howtogeek.com/352668/how-to-convert-a-microsoft-word-document-to-a-pdf/ |

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| "Page thumbnails and bookmarks in PDFs" | https://helpx.adobe.com/ca/acrobat/using/page-thumbnails-bookmarks-pdfs.html . |
| "Create a table of contents with hyperlinks in Word" | https://support.microsoft.com/en-us/office/insert-a-table-of-contents-882e8564-0edb-435e-84b5-1d8552ccf0c0#:~:text=On%20the%20toolbar%20ribbon%2C%20select,page%20numbering%20in%20your%20document . |
| "How to Search for Text Inside Multiple PDF Files at Once" | https://www.online-tech-tips.com/computer-tips/how-to-search-for-text-inside-multiple-pdf-files-at-once/#:~:text=Search%20Multiple%20PDF%20Files%20Using%20Acrobat%20Reader%201,in%20the%20prompt%20on%20your%20screen.%20See%20More . |

13. PRINTING

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| "Print a document in Word" | https://support.microsoft.com/en-us/office/print-a-document-in-word-591022c4-53e3-4242-95b5-58ca393ba0ee#:~:text=Select%20File%20%E%20Print,the%20page%20to%20enlarge%20it . |
| "How To Print Anything From Your Phone or Tablet, No Laptop Required" | https://gizmodo.com/how-print-phone-tablet-ios-android-ipad-no-laptop-app-1850114790 |
| "Use AirPrint to print from your iPhone or iPad" | https://support.apple.com/en-ca/HT201387#:~:text=Open%20the%20app%20that%20you,User%20Guide%20or%20Help%20section . |
| "Set up printer for Chromebook" | https://support.google.com/chromebook/answer/7225252?hl=en |
| "How to print in Windows 10" | https://www.techadvisor.com/article/726406/how-to-print-in-windows-10.html#:~:text=In%20most%20cases%2C%20go%20to,in%20place%20a%20print%20button . |
| "How to Clear a Paper Jam" | https://www.wikihow.com/Clear-a-Paper-Jam |
| "How to Fix a Paper Jam" | https://www.quill.com/content/index/resource-center/technology/faq/how-to-fix-a-paper-jam/default.cshtml |

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| "How to Load a Bottom Feed Printer" | https://smallbusiness.chron.com/load-bottom-feed-printer-57163.html |
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14. PRACTICE/CASE MANAGEMENT (AMICUS, CLIO, PRACTICE PANTHER)

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| Clio | https://www.clio.com/ |
| Prolaw | https://legal.thomsonreuters.com/en/products/prolaw |
| Aderant | https://www.aderant.com/ |
| Amicus Attorney | https://www.amicusattorney.com/ |
| Practice Panther | https://www.practicepanther.com/ |
| "The Best Legal Case Management Software" | https://lawyerist.com/reviews/law-practice-management-software/ |
| "20 Best Legal Case Management Software Programs for Small and Medium Law Firms" | https://financesonline.com/top-20-legal-case-management-software-programs-small-medium-law-firms/ |

15. SCANNING

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| Adobe Scan | https://acrobat.adobe.com/us/en/mobile/scanner-app.html |
| CamScanner | https://www.camscanner.com/ |
| Dropbox (camera upload feature) | https://help.dropbox.com/create-upload/camera-uploads-overview |
| Evernote Scannable | https://evernote.com/products/scannable/ |
| Genius Scan | https://thegrizzlylabs.com/genius-scan/ |

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| Microsoft Office Lens | https://support.microsoft.com/en-us/office/office-lens-for-windows-577ec09d-8da2-4029-8bb7-12f8114f472a |
| Scanner Pro | https://readdle.com/scannerpro |
| TurboScan | https://turboscanapp.com/ |
| Zoho Scanner | https://www.zoho.com/docscanner/ |

16. MOBILE DEVICES

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| "How to Connect Your Android Device to Wi-Fi" | https://support.google.com/android/answer/9075847?hl=en |
| "Connect to Wi-Fi on your iPhone, iPad, or iPod touch" | https://support.apple.com/en-us/HT202639 |
| "How to install Android apps" | https://www.androidcentral.com/how-install-android-apps |
| "Delete, disable & manage unused apps on Android" | https://support.google.com/googleplay/answer/2521768?hl=en |
| "Download apps on your iPhone or iPad" | https://support.apple.com/en-ca/HT204266 |
| "Delete apps on your iPhone, iPad, and iPod touch" | https://support.apple.com/en-us/HT207618 |

17. INTERNET and NETWORKS

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| “Five Public Wi-Fi Tips, If You Must Use One: Cybersecurity Best Practices” | https://ediscoverytoday.com/2022/10/21/five-public-wi-fi-tips-if-you-must-use-one-cybersecurity-best-practices/ |
| “Public Wi-Fi: An ultimate guide on the risks + how to stay safe.” | https://us.norton.com/blog/privacy/public-wifi |
| “Simple Steps to Protect Yourself on Public Wi-Fi” | https://www.wired.com/story/public-wifi-safety-tips/ |
| “How to Avoid Public WiFi Security Risks” | https://www.kaspersky.com/resource-center/preemptive-safety/public-wifi-risks |
| “Security tips for organizations with remote workers” | https://www.cyber.gc.ca/en/guidance/telework-security-issues-itsap10016 |

18. DIGITAL SIGNATURES (DOCUSIGN)

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| Adobe Sign | https://acrobat.adobe.com/us/en/sign.html |
| DocuSign | https://www.docusign.com/ |
| HelloSign | https://www.hellosign.com/ |
| SignNow | https://www.signnow.com/ |
| SignEasy | https://getsigneasy.com/ |

19. CLOUD-BASED TOOLS

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| Dropbox | https://www.dropbox.com/ |
| Google Drive | https://www.google.com/drive/ |

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| Microsoft OneDrive | https://www.microsoft.com/en-ca/microsoft-365/onedrive/online-cloud-storage |
| Box | https://www.box.com/ |
| Citrix ShareFile | https://www.sharefile.com/ |
| "5 Best Practices for Cloud Security" | https://azure.microsoft.com/en-us/resources/five-best-practices-for-cloud-security/ |
| "Collaborate securely across organizational boundaries and Microsoft clouds" | https://techcommunity.microsoft.com/t5/microsoft-entra-azure-ad-blog/collaborate-securely-across-organizational-boundaries-and/ba-p/3094109 |

20. TIME ENTRY (TIMEKEEP, PROLAW)

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| ProLaw | https://legal.thomsonreuters.com/en/products/prolaw |
| Clio | https://www.clio.com/ |
| ProLaw: Firm Central and Time & Billing Explainer | https://legal.thomsonreuters.com/en/products/firm-central/time-billing |
| "Employee timekeeping software" | https://www.adp.com/resources/articles-and-insights/articles/t/timekeeping-software.aspx |
| "10 Ways Clio Simplifies Lawyer Time Tracking" | https://www.clio.com/blog/lawyer-time-tracking/ |
| "The 5 best time tracking apps in 2023" | https://zapier.com/blog/best-time-tracking-apps/ |

21. FINANCIAL MANAGEMENT (ADERANT, 3E, CLIO)

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| Aderant | https://www.aderant.com/ |
| ProLaw | https://www.elite.com/products/prolaw/ |
| Clio | https://www.clio.com/ |

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| “Why your law department needs a budget” | https://legal.thomsonreuters.com/en/insights/articles/drafting-a-law-department-budget |
| “Planning the first budget for a new law firm” | https://legal.thomsonreuters.com/en/insights/articles/steps-for-planning-a-new-law-department-budget |
| “Year-End Law Firm Accounting: Everything You Need to Know” | https://www.clio.com/resources/legal-accounting/year-end-law-firm-financial-best-practices/ |
| “A Complete Guide to Law Firm Structure & Effective Management ” | https://www.clio.com/blog/law-firm-management/ |
| “Business Case: Building a better legal budget” | https://www.canadianlawyermag.com/news/general/business-case-building-a-better-legal-budget/267126 |
| “How to create (and stick with) a project budget” | https://asana.com/resources/project-budget |

22. RESEARCH

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| CanLII | https://www.canlii.org/en/ |
| Lexis Advance Quicklaw | https://www.lexisnexis.ca/en-ca/products/lexis-advance-quicklaw.page |
| WestlawNext Canada | https://www.westlawcanada.com/home/ |
| HeinOnline | https://home.heinonline.org/ |

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| <p>Wolters Kluwer / CCH Online</p> | <p>https://www.cch.ca/products/cch-online/</p> |
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Assessing Risks and Benefits of Technology

Technology is capable of supporting law practices in numerous ways, but also presents risks that can expose lawyers to potential liability to their clients if they do not fully appreciate the risks and strategies to mitigate those risks. Lawyers should not only assess their technological competence and improve their knowledge with the above resources, but they should also inform themselves of these risk mitigation strategies. One such additional tool is the [Cloud Computing Checklist](#) contained as a resource under [Law Office Management Standard #6](#).

Protecting Confidential Information

Whether through the naming of a Chief Privacy Officer and implementing a formal privacy management program at larger firms, or the sole practitioner assuming these responsibilities on their own, to be technological competent lawyers and law firms have a duty to understand the purpose behind how personal information is collected, used, disclosed, retained, and destroyed over the course of managing their practice – and to dedicate resources to meet these obligations.

Specifically, lawyers and law firms should consider the following actions when approaching privacy compliance under PIPEDA:

- Ensuring clients know the reasons behind your collection of their personal information (e.g., conflict checks) and securing their informed consent.
- Developing clear retention policies so clients understand their personal information will only be retained for as long as is needed to finalize the retainer, work on the file, etc.
- Advising clients about how their personal information could be used and disclosed for secondary purposes and understanding the level of consent that could be required.
- Creating a system for clients to access their personal information upon written request.
- Establishing security safeguards to protect the personal information of your clients; these could include physical and technical measures (e.g., access controls and limitations depending on practice areas; IT resources to enhance cybersecurity resiliency, etc.)
- Maintaining a formal data breach response plan and notification process if/when necessary.
- Understanding any additional obligations that may arise when transferring clients' personal information outside of Nova Scotia (e.g., provincial privacy laws in Quebec and Alberta; potential new laws in Ontario and B.C.), and Canada.
- Developing and implementing a privacy management program that includes formal policies and procedures to specifically outline how the lawyer and law firm protect personal information, deal with complaints, train staff, and explain these processes in plain language.
- Implement a compliance system to deal with any future federal privacy commissioner audit request.

Artificial Intelligence

- See NSBS [Artificial Intelligence in the Practice of Law](#).

Technology and Accommodations for persons with disabilities

- Web Content Accessibility Guidelines ([WCAG](#))
- Federal government [Standard on Web Accessibility](#)
- Nova Scotia [Accessibility Directorate](#)
- Nova Scotia [Accessibility Act](#)