|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for**  **follow up** |
| **Technology** | | | | | |
| **1.** Have you taken the time to learn how to use technology in your practice? |  |  |  |  |  |
| **2.** Do you provide regular training opportunities to staff? |  |  |  |  |  |
| **3.** Do you regularly back up your computer system? |  |  |  |  |  |
| **4.** Is a current copy of your computer back up stored off site in a secure location or in secure cloud storage? |  |  |  |  |  |
| **5.** Is your back up system maintained by a different individual than the primary system? |  |  |  |  |  |
| **6.** Do you routinely check if your back up is viable? |  |  |  |  |  |
| **7.** Do you have a reliable computer consultant to assist you in emergencies or with updating your system? |  |  |  |  |  |
| **8.** Are you using software for the following:  **a.** Word processing? |  |  |  |  |  |
| **b.** Accounting and financials? |  |  |  |  |  |
| **Inquiry** | **Yes** | **No** | **N/A** | **Notes/Comments** | **Note improvements needed & dates for follow up** |
| **Technology** | | | | | |
| **c.** Conflicts of interest? |  |  |  |  |  |
| **d.** Calendaring and docketing? |  |  |  |  |  |
| **e.** Case management? |  |  |  |  |  |
| **f.** Law specialty programs? |  |  |  |  |  |
| **g.** Legal research? |  |  |  |  |  |
| **h.** Litigation support? |  |  |  |  |  |
| **9.** Are laptop computers, tablets, or smart phones sufficiently secured to protect confidential information in case of lost or theft? |  |  |  |  |  |
| **10.** Are you careful when using a cell phone, laptop, or tablet in public so as to not review client confidences? |  |  |  |  |  |