



Questioned Documents—2020

J16 Practice Management Software: The Key to Staying Organized

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Learning Overview: The goal of this presentation is to introduce the concept of practice management software and illustrate the advantages of keeping communications, evidence copies, examination records, and billing information in one place.

Impact on the Forensic Science Community: This presentation will impact the forensic science community by offering a user-friendly method of evidence management to keeping records clean and organized. This presentation is directed toward experts of all types in private practice.

Experts in forensics find themselves in an age where documentation and data storage methods are crucial to their credibility. No longer can one put a file on the hard drive for later retrieval without first making it easily retrievable. Important work product and related documents are sometimes required at a moment's notice, not to mention that the file system of one's personal hard drive poses many challenges when trying to locate important information.

In the attorneys' world, a great number of software programs have been developed to help keep evidence, case law, and work time sorted out. Over the years, it has become more inclusive of communications, work product, and time tracking, allowing the attorney to keep all the documents related to a case sortable and searchable. These developments have inadvertently served adjunct legal professionals, such as expert witnesses.

Experts have the same challenges as attorneys, particularly those who are engaged in private practice. While not as closely monitored as certified document labs, private practitioners should be providing a similar regimen of data maintenance and retrieval. Further, there should also be a secure means of transmitting work product and any other data to clients rather than using Gmail® or Yahoo®.

Practice Management Software (PMS) for attorneys has provided solutions to organizing the data management problem in the office. From the intake information to the final billing, PMS will consolidate every part of the expert's work. The only part of everyday work that is not included is Marketing and Internal Finances, which is necessarily separate from the work that is performed in the forensic lab.

The purpose of this presentation is to stimulate the thought processes of the private practitioner toward streamlining and consolidating his or her work product so it is searchable for future projects and for conflict checks, available for other cases that involve similar issues or questions, and provide an accessible database for historic work that could be useful as resources.

This presentation is an introduction to the software used in law offices as it applies to expert witness work. While not an endorsement of any one brand of software, this presentation will discuss the potential for every expert to consolidate his or her data, evidence, work product, time tracking, and communications into one easy-to-use location that is more secure than the open internet. Each of the software applications that are being presented have been used and there will be discussion on the pros and cons of each. Other software options will be included, but all software in this genre are not necessarily mentioned.

Practice Management, Evidence Management, Private Practice Software