



Spring Cleaning for Office Systems

When is the last time you did a *thorough* review of your office systems? Two years ago? Five years ago? Never?!!!

Office systems should be audited annually or in conjunction with significant changes in your practice. Thorough audits evaluate the following:

- Calendaring
- Docketing
- File Tickling
- Time and Workflow Management
- Case and Client Screening
- File Management
- Conflicts of Interest
- Time and Billing Practices
- Trust Accounting Compliance
- Office Management Practices (including Staffing)
- Knowledge of and Compliance with Ethical Rules

Over time, most lawyers find they need to make adjustments to one or more of their systems. If your practice is growing, if you have changed areas of law, or recently hired staff your systems are likely out-of-date. An audit can help you pinpoint areas for improvement. To make this process as painless as possible, use a [checklist](#). Remember you can also call on [your state's friendly PMA](#) (Practice Management Advisor). In [Oregon](#) three PMAs are at your disposal. Our services are free and confidential. Give us a ring!

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