



Running or Reopening Your Practice Amid COVID-19



The outbreak of COVID-19 has caused our society to reconsider travel and social interactions. As a result, regular business meetings are being canceled and postponed.

Numerous businesses, including law firms, are asking employees to work from home and have to re-evaluate how to meet with clients.

As you identify your coronavirus contingency plans, we're here to help ensure your practice can operate "business, not as usual" through the implementation of virtual solutions.

ElderCounsel has run its business as a virtual company for the past 11 years (since its inception). During that time, we have conducted hundreds of meetings and seminars via webinar. Over the last few years, we have invested heavily in technology and systems to improve services for our members and increase the productivity of our team. We are opening our "virtual" doors to help you learn ways to run your practice, manage employees, and meet with clients based on what we've learned. We're sharing strategies and online programs we've utilized, so you don't waste valuable time figuring it out yourself.

This guide provides information on digital and cloud-based technologies and insights on running a business and a team virtually. Also included are resources you can use in your communications to your clients and communities.

Businesses that quickly respond to and implement systems will be able to reduce the impact on their business when the unexpected occurs. Amid COVID-19, transitioning to remote meetings and work environments, will illustrate responsiveness and flexibility during a time of caution.

Further, you have an opportunity. While it is a sensitive time for our society, especially for our senior population, estate and elder law planning firms are in a position to educate clients and referral sources on the implications of planning failure, particularly in times of uncertainty.

If you have questions or wish to discuss how to implement a contingency plan for your business, don't hesitate to contact one of our Practice Solutions Advisors.

Lori Pulvermacher, MBA
lori.pulvermacher@lawasabusiness.com
608-370-5602
[Schedule a call](#)

Jim Wolverton, JD.
jim.wolverton@lawasabusiness.com
720-689-1977
[Schedule a call](#)

Staff and Office Management

The country is reopening, however, there is still concern about the of COVID-19. Businesses must continue to be vigilant about employee and client safety.

Prepare for prolonged absences.

Employee absences may increase due to illness in their families and/or the inability to secure childcare. Whether schools will allow in person instruction in the fall has not yet been determined in many areas. Further, your team members may be uncomfortable returning to the office for fear of contracting the virus.

Here are some resources for business owners in developing action plans to deal with the situation.

- [Coronavirus Guidance for Business Preparedness](#)
- [Coronavirus Employer FAQs](#)
- [What Are Companies' Legal Obligations Around Coronavirus?](#)

Also, the CDC has [several resources available on its website](#).

Remote Working Environment

Our entire world is online. Working in a virtual environment in our society is becoming more normalized, with nearly 50% of our workforce working remotely at least one or more days per week. However, if you have never conducted business or managed a team remotely, initiating the change comes with several unknowns and challenges.

Most important is to stay connected – both with your employees and with your clients. One of the biggest obstacles companies face when transitioning to a remote work environment is keeping communication open. Without the convince of being in the same space as your employees and clients on a daily basis, additional processes may be required to make sure your staff has access to all the tools they need to perform their jobs and your clients have access to the resources you're providing as part of your service.

Fortunately, many of the systems you already have in place can be accessed digitally and do not require you to be in a specific location to do so. Programs like Eldorado, Office365, and Clio can all be operated via internet and help stimulate collaboration among employees.

When transitioning to a virtual work environment, managing staff, maintaining accountability, and ensuring quality control and productivity will require

effective communication, robust processes, and the technology to support collaboration and fostering relationships.

File Sharing and Work Collaboration

Box

<https://www.box.com/home>

Box is a cloud content management and file sharing system for businesses. Upload documents, videos, photos, etc. to the service from your phone, tablet or computer, and then access those files anywhere - think of it as a floating hard drive that's connected to all your devices.

Box allows you to share files with users, both inside and outside of your company. You can invite users to collaborate on a folder or file, download materials, and upload new versions by either adding them as a collaborator or sending them the file sharing link. Box will also save the old versions of uploaded documents for future reference, giving you an easy way to track changes made in collaborative files.

Box can also be embedded into your website so visitors can have easy access to public files.

Pricing: \$0 for up to 10GB, \$10/month for 100GB

Dropbox

<https://www.dropbox.com/>

Dropbox is a similar service to Box that allows users to store files in the cloud and access its contents anywhere. A Dropbox Basic account is free and includes 2GB of space. The software gives you the ability to share file and folder links and create team folders with multiple collaborators. Dropbox also tracks the version history of a document for easy reference.

Dropbox also has the option to download free apps to access Dropbox from your computer and mobile devices.

Dropbox Business Pricing: \$15 to \$25/user/month
30-day free trial available.

Google Docs

<https://docs.google.com>

Google Docs is a free, web-based software office suite offered by Google within its Google Drive service (Google Sheets and Slides are also products Google Offers). Google Docs is available as a web application, mobile app, and desktop application on Chrome. The app is compatible with Microsoft Office file formats. The application allows users to create and edit files online while collaborating with other users in real-time. Google Docs can track changes made (and who made them) to a document for easy collaboration. Multiple users can also have the document open at once and work on the file simultaneously.

Communications and Accountability

Sococo

<https://www.sococo.com>

Sococo is an online application built to mimic an in-office environment. Users are assigned offices with additional breakrooms and conference rooms for team meetings. The application enables users to send instant chats, host virtual meetings, share their webcams and microphones, and share their screens with their coworkers. The software also integrates with Zoom to make it even easier for users to host virtual meetings with internal and external clients.

Pricing: \$13.49/user/month (up to 49 users)

Free trial available.

Slack

<https://slack.com/>

Slack is an online workspace that is created through different channels that employees can communicate through. Slack allows you to customize your channels to fit your business needs, allowing users to create channels for different teams, projects, offices, etc. and can be used as alternative (or in addition to) email. Channels can be made private for additional security, or shared to keep your whole team in the loop.

Slack supports team communication and collaboration across remote distances by enabling the sharing of documents, images and other assets across teams. The software also provides a searchable history for easy access to old conversations and shared files.

Additionally, Slack integrates with a number of different applications to maximize its utility, including Box, Zoom, Office 365, Salesforce and more. Slack also allows for voice or video calls among members.

Pricing: \$0 to \$12.50/month

Google Duo

<https://duo.google.com/>

Google Duo is a video calling app that works across platforms (mobiles devices, desktops, and smart displays) with up to 12 participants. It utilizes your phone number to connect with your contact list over Wi-Fi and users can choose to join via video or audio only.

Price: Free

Microsoft Teams

<https://duo.google.com/>

Microsoft Teams is a chat-based collaboration platform that allows user to share documents, meet online, and chat with teammates. The platform organizes groups into different channels for easy communication between teams. The software fully integrates with other Office 365 services, such as Skype, giving it the ability to also function as a video conferencing system.

Price: Free

Project & case Management

TaskRay

<https://taskray.com>

TaskRay is the primary project management system for Salesforce integration (users will need SaleForce to purchase TaskRay). TaskRay allows users to create projects, set deadlines, and assign team members to specific tasks. The software tracks deadlines, sends reminders, and allows users to comment and collaborate on projects. Taskray also always users to create templates for quick implementation of recurring projects.

Price: Starts at \$25/user/month

Trello

<https://trello.com/en-US>

Trello is a project management tool that can be accessed anywhere via the web. It gives users the ability to see what's being worked on, who's assigned to what, and the status of the project. It's a simpler version of other more robust project management tools, intended for the everyday user (versus project management professionals who need advanced software for more complex projects). Trello uses visuals to construct workflows to help users conceptualize a project from start to finish

Pricing: \$0 to \$20.83/month (up to 100 users)

Basecamp

<https://basecamp.com>

Basecamp is a web-based communication tool used for managing projects. It includes features to help teams stay up-to-date and on track. Basecamp allows utilizes message boards, to-do lists, group chat, file storage, and more to keep teams focused and accountable. Managers have the ability to track progress, as well as see upcoming tasks assigned to each employee. Basecamp organizes each project so it's simple for team members to see their daily tasks and upcoming deadlines.

Price: Basecamp Business \$99 (flat monthly fee)

Clio

<https://www.clio.com>

Clio is a cloud-base legal practice management solution for small to large firms that allows businesses to track deadlines, manage cases, bill clients, and accept payments. Clio helps users monitor their billable hours and performance based on company goals. Clients are able to access their information through the client portal and payments can be made through Clio directly to a client's trust or account.

Clio is accessible via mobile and desktop devices, and it offers iOS and Android app.

Price: Ranges from \$39 to \$125/month

Practice Panther

<https://www.practicepanther.com>

Practice Panther is a law practice management software that allows firms to track their time, billing, payments, expenses, and calendar all in one system. The software also provides document storage for managing cases and clients, and integrates with multiple platforms includes Box, Gmail, Google Calendar, Outlook, QuickBooks, and more.

Price: \$39/user/month

MyCase

<https://www.mycase.com>

My case is a cloud-based law practice management software that organizes all case information into one conveniently located place. MyCase will handle basic accounting, with the ability to bill and invoice clients. The software also has an e-signature feature built in for retainer agreements.

MyCase is limited in its integration capabilities and is best for firms that don't rely on third party software to conduct business.

Price: \$49/month

Smokeball

<https://www.smokeball.com>

Smokeball is a cloud-based legal productivity software with over 14,000 automated forms to help manage your law firm. The software manages cases and clients, tracks your time automatically, bills clients, manages tasks, and integrate with your calendar. The software is accessible via desktop or its mobile application.

Price: Customized for each law firm

Conducting Business Virtually

Modify as needed to fit your style and business model.

Communicating Operational Changes

We are in the business of serving people, and amid this coronavirus outbreak, we must give you as much flexibility as possible when working with our firm. During this time of concern, you may feel uncertain about traveling or entering public spaces. We want you to know that virtual meetings are available. Web meetings enable us to connect, review your unique circumstances and evaluate your needs, all from the comfort of your home or office, without delaying your planning objectives.

Further, we are available to conduct phone or in-home meetings.

Your safety and peace of mind is our priority. We wish you good health and peace of mind to you and your loved ones.

If you have any questions on estate, long-term care, Medicaid, or special needs planning, do not hesitate to reach out to us.

If face-to-face meetings remain an option, you might share something like this:

At this time, our doors are open, and we continue to conduct client consultations and meetings. If this changes, our team will communicate alternative options or reschedule appointments as needed.

As a precaution, all surfaces and chairs will be disinfected before and after each client engagement.

We look forward to continuing to serve you. Please don't hesitate to reach out.

Meetings & Communications

Skype

<https://www.skype.com>

Skype is accessible to most people with an internet connection, and allows users to connect with one another through instant chat and video conferencing.

While a paid subscription is required to communicate with land-based phones, most offices can use this service for free. Skype also offers instant messaging services with the ability to share texts, video, audio, and images. It's built for both one-on-one and group conversations and is compatible

with mobile, PC, Xbox, and Alexa.

Zoom

<https://zoom.us>

Zoom is a communications software that combines video conferencing, online meetings, chat, and mobile collaboration. It works across multiple platforms enabling access from a browser or the application via laptops, tablets, and smartphones.

Zoom's software makes it easy to launch meetings in the application where users can share audio and video, send direct chats, send files, and share their screens with participants.

Additionally, Zoom does not require all users to set up an account in order to access a meeting (only the meeting host is required to have one).

Zoom can also integrate with other online platforms, like Skype and Sococo for a seamless video conferencing experience.

Pricing: \$0 to \$19.99/month/account

The free account permits up to 100 participants, up to 40-minute meeting limit.

Calendaring

These services allow your clients or colleagues to book time with you directly based on your dictated availability and takes the hassle out of matching calendar availability and the back and forth of email. Share via a link or integrate it within your website.

Calendly: <https://calendly.com>

OnceHub: <https://www.oncehub.com>

Seminars & Workshops

Retail and wholesale seminars can be an effective way to generate new leads and business consistently. Some firms' seminar strategy is their primary source for new client acquisition. How do you keep this going in a time when gatherings are being restricted?

Live stream, webcast, webinar, virtual workshop—many names, one concept: deliver your message to your audience, anywhere, anytime.

Invited attendees log-in via a computer, tablet, or mobile and see and hear what's happening with the option to participate.

There are many different software choices for hosting virtual meetings. They can be effective and provide time and cost-savings too.

Zoom

<https://zoom.us>

Zoom is a communications software that combines video conferencing, online meetings, chat, and mobile collaboration. It works across multiple platforms enabling access from a browser or the application via laptops, tablets, and smartphones.

Zoom's software makes it easy to launch meetings in the application where users can share audio and video, send direct chats, send files, and share their screens with participants.

Additionally, Zoom does not require all users to set up an account in order to access a meeting (only the meeting host is required to have one).

Zoom can also integrate with other online platforms, like Skype and Sococo for a seamless video conferencing experience.

Pricing: \$0 to \$19.99/month/account

The free account permits up to 100 participants, up to 40-minute meeting limit.

GoToWebinar

<https://www.gotomeeting.com/webinar>

GoToWebinar is a webcasting platform curated for formal presentations with limitation on audience interaction. During the webinar, attendees are hidden and muted, but can still interact with you via the GoToWebinar control panel. GTW is an all-inclusive event platform, meaning everything you need from registration through the event can be done within GoToWebinar, and doesn't require any additional support programs to run your session. GoToWebinar allows you to add additional event organizers and panelists to support your webcast. It also allows presenters to share polls, handouts, and surveys during the attendee experience.

Pricing: \$49 to \$99/month.

Free seven-day trial option.

Equipment & System Requirements

Technological advancements have improved the quality of built in webcams and microphones in most laptops and many users are able to use these features without issue. For desktop users and those without webcam/microphone features built into their computers, there are other affordable options to consider:

- [Microsoft LifeCam HD-3000](#) (Current sale price: \$22.90)
- [Logitech HD Laptop Webcam C615](#) (Current sale price: \$35.99)
- [Logitech C920S HD Pro Webcam](#) (Current price: \$67.99)

Be sure your internet speed will support streaming the workshop, and your environment is conducive to a lecture-style presentation.

- We strongly recommend a wired internet connection with a minimum speed of 20 Mbps. Learn your speed at www.speedtest.net.
- Our experience is that Google Chrome is the most reliable browser.
- Have a quiet place without interruptions or distracting background.
- Use a wired microphone.
- Close other applications and bandwidth-heavy systems such as cloud applications that require continuous syncing.
- If you wish to allow your attendees to participate, you'll need a speaker (built-in or external) to hear them.

Don't be intimidated by virtual meetings and webinars.

LAB Services can advise you on solutions to meet your needs, help your meetings and seminars run smoothly, and assist with technical setup.

What You Can Do Now For You And Your Loved Ones

- Wash your hands with soap and water for at least 20 seconds, especially after blowing your nose, coughing, sneezing, or when you come home from work, school, or errands.
- Use hand sanitizer when soap and water are not available.
- Use antibacterial wipes to clean shopping carts before touching.
- Avoid touching your face, nose, and eyes. The virus needs our help to enter our system and can't get in unless we provide pathways.
- If you cough or sneeze, use a tissue and throw it away.
- Avoid high-touch surfaces like elevator buttons, door handles, handrails, and touch screens. If you must touch something, use your sleeve or a tissue to cover your hand or finger.
- Find alternatives for greeting. Rather than shaking hands, touch elbows, wave, or avoid contact.
- Use household disinfectants to clean surfaces and objects you touch regularly.
- Prepare to separate yourself and loved ones from others to reduce your risk of infection.
- Make preparations that would enable you to stay home for two weeks or longer.

COVID-19 Readiness Resources

- Visit [cdc.gov/COVID19](https://www.cdc.gov/COVID19) for the latest information and resources
- [COVID 2019 Situation Summary](#)
- [Prevention and Treatment](#)
- [What to Do If You Are Sick](#)
- [Pregnant Women and COVID FAQs](#)
- [Stigma Related to COVID-19](#)
- [Handwashing: A Family Activity](#)
- [Handwashing: Clean Hands Save Lives](#)

CDC Interim Guidance for Specific Audiences

- [Interim Guidance for Administrators of US Childcare Programs and K-12 Schools to Plan, Prepare, and Respond to Coronavirus Disease 2019 \(COVID-19\)](#)
- [Interim Guidance for Businesses and Employers to Plan and Respond to Coronavirus Disease 2019 \(COVID-19\) \(Updated 5-6-20\)](#)

CDC Communication Resources

- [Communication Resources](#)
- [Print Resources](#)
- [Buttons and Badges](#)
- [Workplace decision tree](#)

OSHA Guidance on Preparing Your Workplace

- [Comprehensive Guide by OSHA](#)

Sample Employee Communications

Welcome Back Letter: (<https://www.thinkhr.com/covid19/>)

Note to employers: Adjust language as necessary for your company/workplace. Be sure to check any state and local public health guidance as you formulate return to work plans.

To **[Company name]** employees:

Welcome back to work!

You'll notice various changes in the way our workplace looks as well as new practices and protocols. We understand these changes may be difficult and we are here to support you. Our goal is to collaboratively ensure you feel safe and secure so together we can navigate the complexities of our "new normal."

Here are some things we are implementing to help keep our workplace safe and to support you:

- More frequent cleaning and sanitizing.
- Access to hand sanitizer throughout the workplace.
- Access to our employee assistance program (EAP) and other mental health resources (contact HR or **[name and email of person to contact]**).
- Staggered shifts so fewer people are on-site at one time.
- More frequent communications on our business, projections, new policies and requirements, your health and safety, and measures we are taking to support you and our community.
- New limits on the number of people allowed to gather in rooms, conference rooms, and communal areas at one time (no more than **[x]** people).

Here are some things we expect you to implement to help keep our workplace safe:

- Go home if you feel sick.
- Wash your hands often, and for the recommended 20 seconds.
- Stay at least 6 feet apart when moving through the workplace.
- You may, but are not required to, wear a face mask or cloth face covering in the workplace.
- Be considerate of your co-workers (remember, we're all in this together).
- Call, email, message, or video conference as much as possible rather than meet face to face.
- Be conscious and understanding of your co-workers who may be dealing with child care issues, illness or loss of loved ones, financial insecurity, and other issues.
- Speak with your manager, HR, or **[name and email of person to contact]** if you have questions or concerns.

Thank you for your patience and cooperation, and welcome back to **[Company name]**.

[Name and signature]

Employee Notice – Face Coverings: (<https://www.thinkhr.com/covid19/>)

Note to employers: State and local laws and orders may provide different or additional requirements for employers regarding masks or face coverings, including guidance on whether employers must provide and pay for them, who must maintain and clean them, and more. Review applicable mandates to ensure compliance.

Dear employees:

We continue to monitor our workplace and add safety measures based on guidance from the Centers for Disease Control and Prevention (CDC) and other government organizations. In line with those safety measures, we are providing this guidance regarding the use of face coverings to prevent the spread of COVID-19.

Unless otherwise notified by your direct supervisor, you are required to wear a face covering at work. A **face covering** is generally a cloth, bandana, or other type of material that covers an employee's mouth and nose. The CDC recommends that individuals wear cloth face coverings in public places or when it is impossible to practice social distancing.

Remember that wearing a face covering can help prevent the spread of the disease, but only in addition to other measures that you should be taking in the workplace and at home, such as frequent hand washing, cleaning and sanitizing frequently-touched surfaces, and practicing social distancing.

If you feel sick or if you are experiencing any symptoms of COVID-19 (fever, cough, difficulty breathing, chills, headache, muscle pain, sore throat, or new loss of taste or smell), let your supervisor know, go home immediately, and contact your healthcare provider for additional guidance.

To get the most benefits from a face covering:

- Make sure it completely covers your nose and mouth.
- Read the directions for use (if provided).
- Wash your hands before and after removing it.
- Try not to touch your face when you adjust it throughout the day.
- Keep cloth coverings clean by washing daily, or more often if contamination occurs.
- Don't let others wear your face covering.
- Keep it away from machinery that it could get caught in.
- If using disposable face coverings, do not reuse them, and throw them away in appropriate trash receptacles.
- Don't lay your face covering on any surface that may contaminate either the covering or the surface.
- Don't use it if it's damaged or has holes, unless it is the only face covering you have access to.

Workplace Decision Tree (CDC)

WORKPLACES DURING THE COVID-19 PANDEMIC



The purpose of this tool is to assist employers in making (re)opening decisions during the COVID-19 pandemic, especially to protect vulnerable workers. It is important to check with state and local health officials and other partners to determine the most appropriate actions while adjusting to meet the unique needs and circumstances of the local community.

Should you consider opening?

- ✓ Will reopening be consistent with applicable state and local orders?
- ✓ Are you ready to protect employees at higher risk for severe illness?

ANY NO



ALL YES

Are recommended health and safety actions in place?

- ✓ Promote healthy hygiene practices such as hand washing and employees wearing a cloth face covering, as feasible
- ✓ Intensify cleaning, disinfection, and ventilation
- ✓ Encourage social distancing and enhance spacing between employees, including through physical barriers, changing layout of workspaces, encouraging telework, closing or limiting access to communal spaces, staggering shifts and breaks, and limiting large events, when and where feasible
- ✓ Consider modifying travel and commuting practices. Promote telework for employees who do not live in the local area, if feasible.
- ✓ Train all employees on health and safety protocols

ANY NO



ALL YES

Is ongoing monitoring in place?

- ✓ Develop and implement procedures to check for signs and symptoms of employees daily upon arrival, as feasible
- ✓ Encourage anyone who is sick to stay home
- ✓ Plan for if an employee gets sick
- ✓ Regularly communicate and monitor developments with local authorities and employees
- ✓ Monitor employee absences and have flexible leave policies and practices
- ✓ Be ready to consult with the local health authorities if there are cases in the facility or an increase in cases in the local area

ANY NO



ALL YES

OPEN AND MONITOR



cdc.gov/coronavirus

HEALTHY AT WORK

HealthyatWork.Ky.Gov



Please help us all stay healthy at work by practicing the following:



- **DO NOT ENTER** THE PREMISES IF YOU HAVE FELT SICK IN THE LAST 24 HOURS
- **REMAIN SIX (6) FEET APART** WHENEVER POSSIBLE
- **WEAR A CLOTH MASK** WHENEVER YOU'RE AROUND OTHERS, IF IT IS SAFE TO DO SO
- **WASH HANDS** AND USE HAND SANITIZER FREQUENTLY
- **DO NOT GATHER** IN COMMON AREAS
- **CHECK YOUR TEMPERATURE** AND FOR ANY COVID-19 SYMPTOMS DAILY AND GET TESTED IF YOU HAVE ANY SYMPTOMS
- REPORT ANY COMPLIANCE CONCERNS TO THE HEALTHY AT WORK OFFICER OR **(833) KYSAFER**

TEAM
KENTUCKY

