



TECHSHOW2020

Documents in a Snap

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The remarks made in this presentation are mine and mine alone.
These remarks do not reflect the views of the Social Security
Administration or the United States Government.

~Chris Fortier



Why Automate?

- Clients are less accepting of by the hour billing
- Want to buy a product, not time
- Do the work you were meant to do
- Uniformity in look/training

What is Your Workflow?



Idea



To do



Doing



Done

Candidates to Automate

- Frequent Users
- Occasional but Complex Users

Design It

- CRITICAL!!!!
- The Basics (What to Collect)
 - Names, Addresses, Phone Numbers, Emails
- Document Format (How It Looks)
 - Margins, font, size, Single/Double Space
- Frequently Used Sentences/Paragraphs (Go Tos)
- Regulations/Laws/Codes (The Steady Hands)
 - Don't forget to review and update every year (or sooner)!

Design Your Template

- Start with your local rules (formatting)
 - Use Standard Formats (like one inch margins) for non-court stuff
- How do you substantively structure your document?
 - Think jurisdiction, facts, applicable law, conclusion
 - Create a bare bones structure
- Frequently used clauses and paragraphs
 - Favorite restatements of law
 - Direct quotes of statutes, regulations
 - Frequently used precedents

IF This THEN That...

IF means something happens

THEN means the result of something happening

ELSE means the result of something not happening

IF This THEN That...

IF federal civil rights action, **THEN** add this language (42 USC 1983) in our applicable law section:

Every person who, under color of any statute, ordinance, regulation, custom, or usage, of any State or Territory or the District of Columbia, subjects, or causes to be subjected, any citizen of the United States or other person within the jurisdiction thereof to the deprivation of any rights, privileges, or immunities secured by the Constitution and laws, shall be liable to the party injured in an action at law, suit in equity, or other proper proceeding for redress, except that in any action brought against a judicial officer for an act or omission taken in such officer's judicial capacity, injunctive relief shall not be granted unless a declaratory decree was violated or declaratory relief was unavailable. For the purposes of this section, any Act of Congress applicable exclusively to the District of Columbia shall be considered to be a statute of the District of Columbia.

Document Variables

Save custom information without actually putting it on the document or using a custom property.

Name

Gender

Applicable Law & Citations

Address

Type of Action

Forum

Autotext

Preferences

- Automatically capitalize words
- Use smart quotes
- Automatically detect links
- Automatically detect lists
- Suggest action items
- Suggest contacts in comments
- Show link details

- Automatic substitution

<input checked="" type="checkbox"/>	(c)	©
<input checked="" type="checkbox"/>	(r)	®
<input checked="" type="checkbox"/>	*com1	the purpose of committ
<input checked="" type="checkbox"/>	-->	→
<input checked="" type="checkbox"/>		

Cancel

OK

File

Home

Insert

Draw

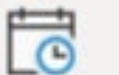
 Share



Text
Box ▾



Text

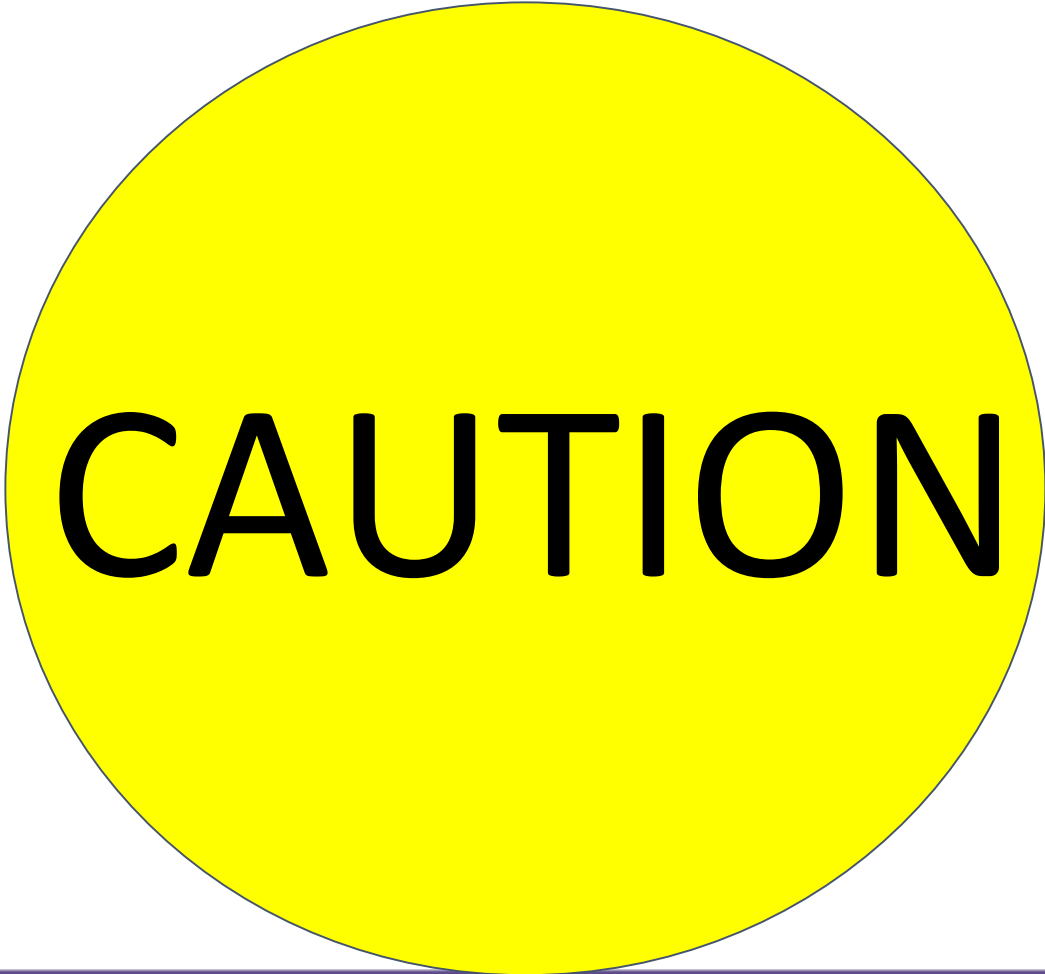


π Equation ▾

Ω Symbol ▾

Symbols

FIND AND REPLACE

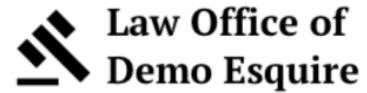


CAUTION

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General

First Name *

Scott

Middle Name

Last Name *

Kelly

Date of Birth *

mm/dd/yyyy

Are you a citizen of
the United States?

Yes

No

Social Security No *

.....

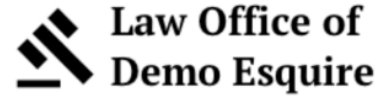
What is your current
marital status?

I'm married

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Family

Children

How many children *
do you have?

Child 1

Name of Child *



Date of Birth *

Social Security No.



Other Family

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Debt & Liabilities

Please provide information about your debts and liabilities. Type in "0" if you don't have liabilities in a specific category.

Mortgage * \$

Please describe this liability (creditor name, etc.)

Other Loans * \$

Spousal, Partner, and/or Child Support * \$

Other Court Judgments / Settlements * \$

Other Liabilities/Debt * \$

PDF Editing

- [SmallPDF](#)
 - Compressing PDF files if they are too large.
 - Require a subscription (12/month) 14 day free trial
- [PDF2Go.com](#)
 - Full Suite of Services in the Cloud
 - Two tiers of free service (registered gets you more file size) plus paid
- [PDFSaM](#)
 - Split and Merge
 - Freemium (Split & Merge are free)(Drag and reorder premium)

Intelligent Review Products

- PerfectIt
 - Consistency (spelling, hyphenation, US/CA/UK/AU English, bullets, numbers)
 - Citation style (ALWD v. Bluebook)
- LanguageTool
 - Edits for redundancy, date accuracy
- Typely
 - Edits for redundancy, jargon, illogic, clichés, sexism, misspelling, inconsistency, misuse of symbols, malapropisms, oxymorons, security gaffes, hedging, apologizing, pretension, and more.

Typely

The screenshot displays the Typely web application interface. At the top left, there is a 'TYPELY' logo. The main area is divided into two sections: 'EDITOR' and 'GENERAL SETTINGS'. The 'EDITOR' section contains three paragraphs of text. The first paragraph is highlighted in yellow and contains a red squiggly line under the sentence 'My password is password.', which is also highlighted in pink. The second and third paragraphs are also highlighted in yellow. The 'GENERAL SETTINGS' section is currently empty. On the right side, there is a 'RESULTS' panel with three tabs: 'RESULTS', 'STATS', and 'OPTIONS'. The 'RESULTS' tab is active and shows two items: 'Highlight all' with a blue toggle switch, and '1 SECURITY PASSWORD' with a blue toggle switch and a small '1' in a square icon.

TYPELY

EDITOR GENERAL SETTINGS

Typely does not focus on grammar, which is at once too easy and too hard – too easy because, for most native speakers, it comes naturally; too hard because, in its most general form, detecting grammatical errors is AI-complete, requiring human-level intelligence to get things right. Instead, we consider usage: redundancy, jargon, illogic, clichés, sexism, misspelling, inconsistency, misuse of symbols, malapropisms, oxymorons, security gaffes, hedging, apologizing, pretension, and more. My password is password.

Typely is precise. Existing tools for improving prose raise so many false alarms that their advice cannot be trusted. Instead, the writer must carefully consider whether to accept or reject each change. We aim for a tool so precise that it becomes possible to unquestioningly adopt its recommendations and still come out ahead – with stronger, tighter prose. Better to be quiet and authoritative than loud and unreliable. We measure the performance of Typely by tracking its lintscore.

Typely defers to the world’s greatest writers and editors. We didn’t make up this advice on our own. Instead, we aggregated their expertise, giving you direct access to humanity’s collective understanding about the craft of writing.

RESULTS STATS OPTIONS

Highlight all

1 SECURITY PASSWORD


LanguageTool

Paste your own text here and click the 'Check Text' button. You can check up to 1500 characters. To check longer texts, just sign up. Click the colored phrases for details on potential errors. **or** use this text **too see an few of of** the problems that LanguageTool Plus can **detecd**. What do you **thinks** of grammar checkers? Please **not** that they are not perfect. Style issues get a blue marker: It's 5 **P.M. in the afternoon**. LanguageTool Plus was released on **Thursday, 20 September 2017**. Can you make any estimated about how useful this might be? Can you believe it. The previous two

The date 20 September 2017 is not a Thursday, but a Wednesday. e premium version.

Ignore this type of error

3 more suggestions found – [switch to the premium version now to see all suggestions](#)

English ▼ American ▼  Premium Upgrade Check Text



TECHSHOW2020

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Please complete the Speaker evaluation before you leave.

See You Next Year!

TECHSHOW 2021: March 10-13, 2021

