

Did you know?

Documentation can save you and your clients time, money and exasperation.

Little Known Fact:

As your practice grows, files could become your biggest headache! Over the years, they can become costly and sometimes cumbersome to store, manage, move, and protect.

Invest in a good document management programme, or archive old files with document management specialists.

Your file could be your best defence in a negligence claim!

Little Known Fact:

Files are records, and hence could also be utilised to verify any errors or omissions! And sometimes, what isn't in your file can be more damaging than what is!

Therefore, ensure that all files have

- ◆ *A system for tracking documents*
 - ◆ *Case plans*
 - ◆ *A record of all conversations!*
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Electronic media makes it easy to save everything.

Little Known Fact:

Storing and retrieving archived data will require equipment, skills and money. Choose wisely and ensure that you and your firm are 100% committed to the endeavour.

Information becomes obsolete with the passage of time.

Little Known Fact:

Information becomes more valuable as the law and the client's situation change.

A formal file retention policy simplifies record management.

Little Known Fact:

Written policies should be fine-tuned and adapted over the years to take into account your firm's workload and file volume.

These written policies should be implemented and enforced consistently. Also, all lawyers and staff should be briefed on these policies and new staff given proper inductions.

Disclaimer

The information provided is a guide. Please adapt accordingly to suit your own circumstances. The Bar Council does not accept any responsibility for any error, omission or deficiency, as all references are not meant to be exhaustive.



Certificate No: 22470