

SoloSez Popular Threads, June 2012

Putting Case Notes in the Cloud for Client Access

I've read that some of you put your bills in the cloud for your client to access so they can access them at any time and see what work has been done and how much it has cost. I'm thinking about doing the same, but my case notes and bills are on the same file, just separate excel worksheets. What are the pros and cons to having your case notes open to the client?

I would consider separating the spreadsheet. Something you note in a simple sentence due to it's minimal impact on the case could be something vitally important to the client. Unless your notes are so long nobody will read them I'd separate them.

Joseph Cohen

If and only if the client was tech savvy enough to handle end-to-end encryption, then I might let the encrypted files sit in the cloud. Bad enough sending anything via regular email.

I can't stress enough that there is no "cloud". There is only the risk of putting your content on unknown servers with no rights to know where and how the data is being stored or moved around and with zero protection if anything goes wrong...unless you've accepted a EULA that says otherwise.

I know I'm in a small minority on this. Facts remain.

Best,

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Robert Thomas Hayes Link, California

It will likely depend on the client. Clients who aren't tech-savvy will hate the cloud thing generally. Tech-savvy clients likely won't. Almost every client will care about their bill. Some clients may care about your notes because they view it as a learning opportunity (i.e. to gain more knowledge). Some clients will take this to an extreme and micro-manage you. Other clients will be interested in your notes, but only to see that you have them and that their money is actually going somewhere.

Other thoughts: by giving your client your notes, you risk them suddenly taking your work-product and bolting to another lawyer. You also risk the client reading your notes and bombarding you with so many layman's

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questions you can't do any real work. Cloud-based storage also has security problems, but that affects everything and not just your files.

If it were my call, I would not put my case notes in the cloud for the purpose of sharing them with the client. If the situation warrants it (e.g. phone call with an out-of-state client), I might do it as a one-time thing. As a general rule, I envision note-sharing being more trouble than it's worth since so few clients would care to read all my notes and those who do would likely be of the micro-managing or high-maintenance variety.

My experience with cloud billing is different because (I think) that every client cares about their bill. Clients care about their case too, but not necessarily all the details of how the resolution they want comes about.

Andy Chen, California

Even worse, the client takes the notes, copies them, gives them to someone else and now they could be discoverable.

Erin M. Schmidt, Ohio

Thanks for all of the thoughtful input. I guess I'll stick to just the bill.
