

CLICKOAI LAW FIRM GUIDE 46 OF 63

Paperless Law Firm Checklist

Keep records authoritative, secure and recoverable.

Use it when	paper is removed or records move to digital storage
Boundary	This is not a security assessment. Obtain qualified advice for sensitive or high-impact systems.

Built for independent law firms in England and Wales

Original ClickoAI edition | Version 1 | 18 August 2026 | clickoai.com/law-firm-guides

1. Frame the decision

Paperless does not mean recordless. The firm needs an authoritative record, controlled access, recovery and deletion rules.

Specific focus

Prove retrieval, retention and restore before disposing of old records.

Questions to answer

- For this guide: Prove retrieval, retention and restore before disposing of old records.
- Which devices reach client data?
- Where is authoritative record?
- Which controls belong to firm?
- Can records be restored?

Avoid

- personal accounts
- assuming cloud defaults are secure
- calling sync a backup

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Identity	Accounts and MFA	Access attributable
Devices	Updates and encryption	Baseline met
Cloud	Sharing and logs	Setup fits use
Records	Retention and deletion	Material is findable
Recovery	Backups and restore	Work can resume

Fail closed

If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.

3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Prove retrieval, retention and restore before disposing of old records.
System	
Data owner	
Users and devices	
Access review	
Restore test	
Incident contacts	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[NCSC: Small organisations guide to cyber security](#)

[NCSC: Choosing a cloud provider](#)

[NCSC: Cloud shared responsibility](#)

[ICO: Information security checklist](#)

[SRA: Confidentiality of client information](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.