

Leveraging Legal Technology in the Child Welfare World: The Benefits of Adobe, Microsoft Word, Excel and OneDrive, LexisNexis Protégé, JusticeText, and Drawboard

Introduction

The legal field is evolving faster than ever. We are expected to juggle hundreds of cases, file new petitions, draft TPR petitions, attend court hearings throughout the weeks and months, craft orders from court hearings with little guidance. Through all of these further expectations are to do this in an 8 hour day within 5 days a week in an efficient, clear manner. For those my age it seems like we are George Jetson walking Astro when a cat jumps on the treadmill.

Some of the software tools that I use on a daily basis is Adobe, Microsoft OneDrive, Word, and Excel. On a weekly basis, LexisNexis Protégé. On a monthly basis, JusticeText and sporadically Drawboard. I want to show you how each helps me be more efficient and less stressed. This presentation is to give you an overview of each product and hands-on use of how it is used in our offices and may be able to help you in your day to day practice. Many of the drill down techniques I use will not be shown/discussed merely for time's sake. If you find use in these products and would like a deep dive as to what I do, then I am more than happy to help you NOT reinvent the wheel.

The goal of this presentation is to highlight **LexisNexis Protégé, Adobe/Drawboard, Microsoft products, and JusticeText**—and how they can be used to in your practice to hopefully improve workflow, better case preparation, and enhanced courtroom service.

LexisNexis Protégé: Smarter Legal Research and Case Analysis

Key Benefits

- **AI-Enhanced Legal Research**
Protégé helps attorneys find relevant cases, statutes, and secondary sources faster and with greater precision.
- **Predictive Analytics**
Identify trends in judicial decisions, opposing counsel behavior, and case outcomes.
- **Brief Analysis Tools**
Upload a draft and receive recommendations for stronger citations, missing authorities, or potential weaknesses.
- **Knowledge Management**
Organize research, notes, and case law in a centralized, searchable platform.

Impact on Legal Practice

Protégé elevates the quality of legal research, reduces the risk of missing key authority, and supports more persuasive writing and argumentation.

Adobe: The Backbone of Digital Document Management

Overview

For those not familiar with Adobe, it along with Drawboard, in laymen's terms is a software/application allowing a user to view/see a portable digital file a/k/a pdf. A pdf is basically an electronic copy of a paper document. The paper document can be a handwritten, typed, photo, etc. Anything that is on a paper that is stored electronically as a PDF needs to have a certain software to open, thus Adobe, Drawboard, Xodo, etc. I primarily use Adobe because it is easier to use in my opinion.

Versions

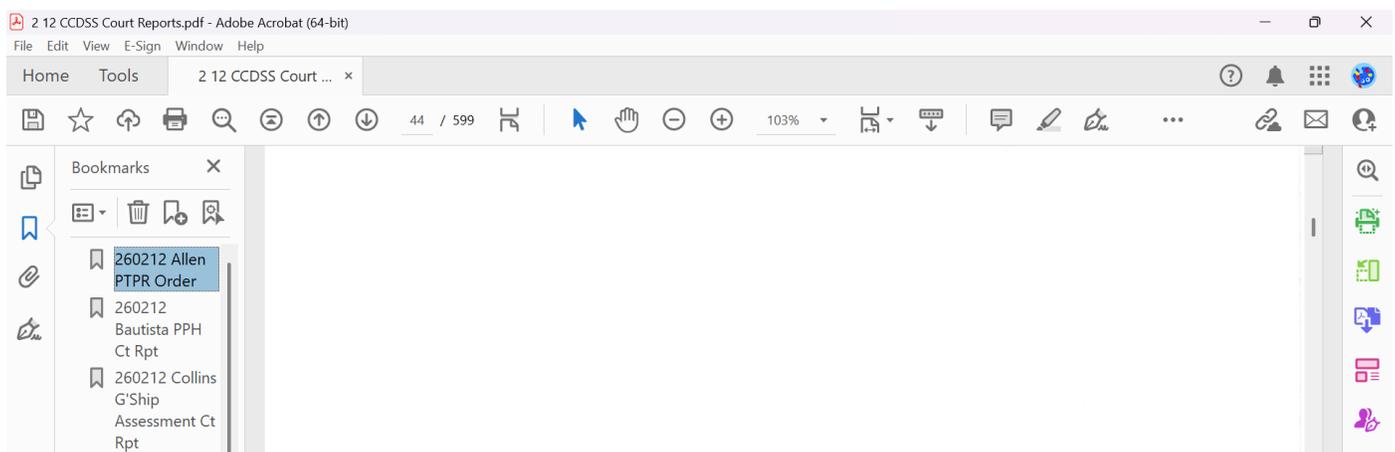
There are three versions of Adobe, Reader, Standard and Professional.

- Reader is free and allows the user to view, print, share, and comment. Very limited
- Standard is fee based and allows the user to do the same as Reader as well as edit text and images in a PDF; create, fill out, sign, and send forms; collect signatures and send bulk e-signature requests.
- Pro is fee based and allows the user to do the same as Reader, Standard and combine files, extract pages, OCR, add headers/footers, redact, create/edit forms, and use the AI Assistant.

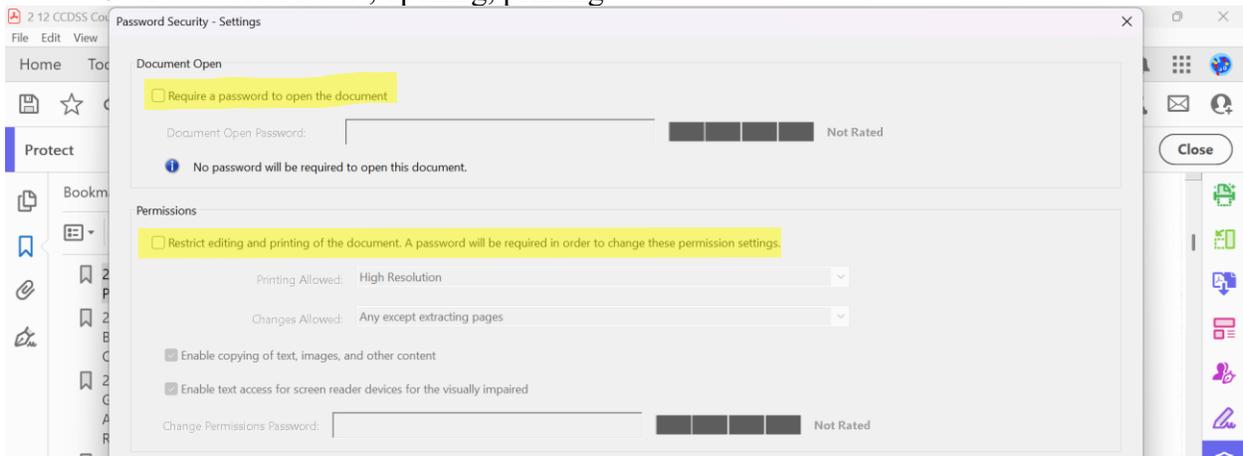
Key Benefits

- **Seamless PDF Creation & Editing**
 - Convert, annotate, redact, and sign documents securely critical for filings.
 - Combine files, organize pages, edit PDF, Export PDF, and Scan & OCR
 - Edit the file to add page numbers, headers and footers, type in/on the document
 - Rotate page(s)
 - Bookmark file for navigation

In combining the court reports or within a specific court report bookmarks are invaluable to jump from one page to another. For instance in combining multiple court reports, I will use the Ctrl + B to create a bookmark at the location that I want to access quickly. Within a court report you can do the same if you want to jump from one section to another, i.e. Medical Hx of the juvenile to the Barriers section of the court report, use the bookmark function.



- Combine files into 1 file and create a form that auto fills as needed
 - We created a file called petition packet that has the ACO forms of the Petition, ASMC, NSC Order, SCRA Declaration and Calendar Request. Since much of the information is the same, when the juvenile's name is inputted at the beginning, the name is auto-filled in the correct spots in each of the remaining documents. The other consistent information is Names and Addresses for Parents, Caretakers, DOB, Sex, Race, etc.
- **Comments**
 - Highlight, Make comments/notes
- **Forms and E-Signature Capabilities**
 - Adobe Acrobat Sign accelerates court reports
 - Prepare forms for internal use.
- **Redaction Tools Built for Compliance**
 - Remove sensitive information is essential for privacy, ethics, and court rules.
- **Protect**
 - Password Protect, opening, printing



Drawboard: Overview

Drawboard is a competitor to Adobe, has a lower monthly fee and does many of the same things Adobe does but in a different platform. Drawboard leans more towards a paperless system where your laptop screen is used more with a stylus/pen.

There are in essence two free versions:

- Drawboard PDF is like Adobe Reader
- ProLite is like Adobe Standard
- ProPlus is like Adobe Pro

Demo:

- Combine, Organize, Delete
- Highlight/Type/Comment
- Password Protect-open, print
- OCR
- Create/Edit Forms

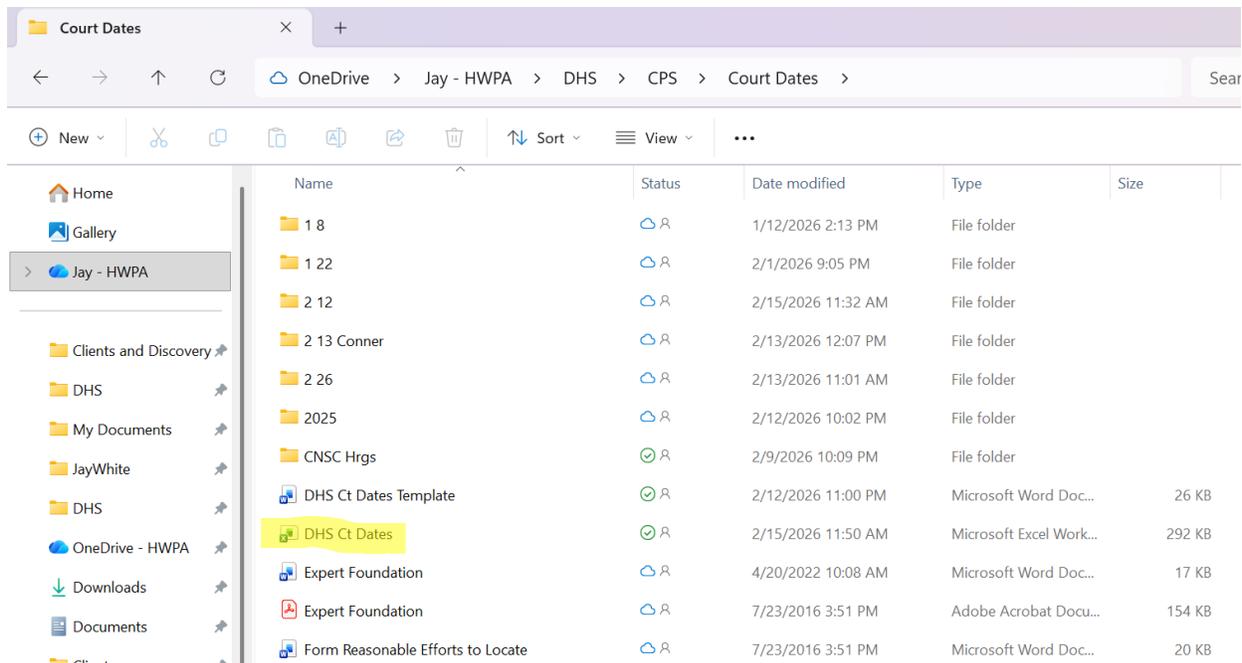
Microsoft OneDrive, Word, Excel: More than meets the eye

Key Benefits

These tools provide you with the opportunity to store for remote access files, craft/draft pleadings, manage case files, and all under one roof/suite of software. Many if not all of us use Word on a daily basis, Excel less frequently if at all and OneDrive maybe even less frequently.

There are great advantages to using Excel as a case management tool and OneDrive as a remote file access/storage tool. In my practice each are used daily for various reasons. An additional Microsoft product that I am learning is OneNote. I believe that OneNote will elevate my case management and be used for trial prep and use in the trial. This is a work in progress. For today we will talk about the other three and the possible benefits for your practice.

- OneDrive: we use it daily to access files for various reasons such as reviewing court reports, discovery, using forms/templates and storing the documents. Every person that I work with inside of child welfare has access to all the folders and files. The persons that are outside of the “child welfare” world only has access to the folders and files that we choose. For instance, Amber, my assistant/paralegal, is able to access everything related to a folder or file. The SWS have access to certain folders and files. All the SWSs and PMs have access to our case management Excel file. This allows the SWSs and PMs to know when any case is set for hearing, what judge the case is assigned to and what the next court date would be in the matter. I.E. when we file the petition, the 60 days for the Adj starts, so the SWS and SW can access the spreadsheet know what cases are on a specific date and plan accordingly if they may be unavailable on a certain court date. After AdjDispo, the next grouping of SWSs and SWs are able to see when the next court date should be to plan for a hearing within the 90 day or 6 month time frame. After staffing for court, a timeline for court will be created that they have access to confirm the time(s) that the SW is needed and when he/she will be free.

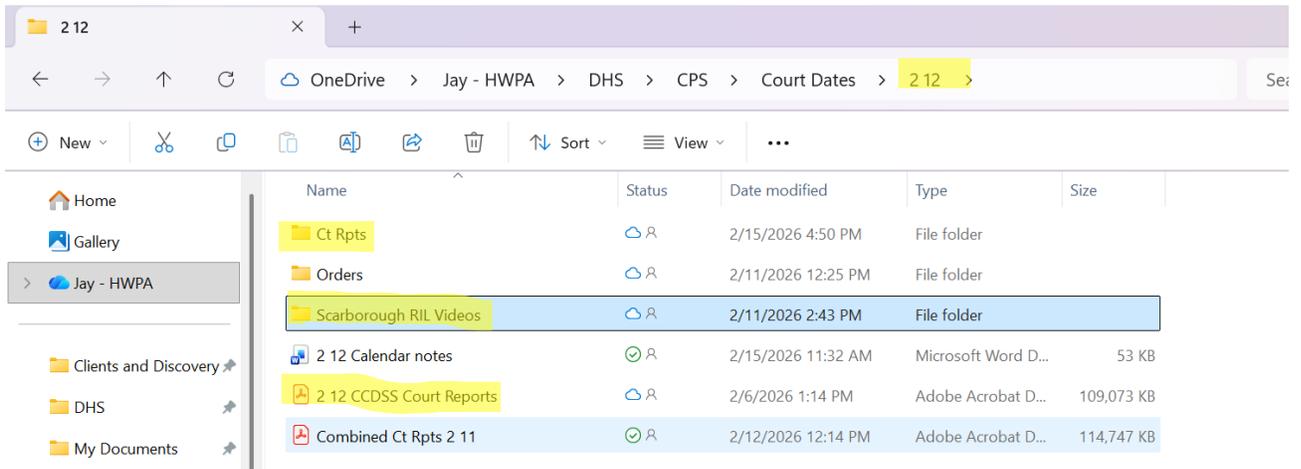


The screenshot shows a OneDrive web interface with a browser window titled 'Court Dates'. The address bar shows the path: OneDrive > Jay - HWPWA > DHS > CPS > Court Dates. The interface includes a navigation pane on the left with folders like 'Home', 'Gallery', 'Jay - HWPWA', 'Clients and Discovery', 'DHS', 'My Documents', 'JayWhite', 'DHS', 'OneDrive - HWPWA', 'Downloads', 'Documents', and 'Clients'. The main content area displays a table of files and folders.

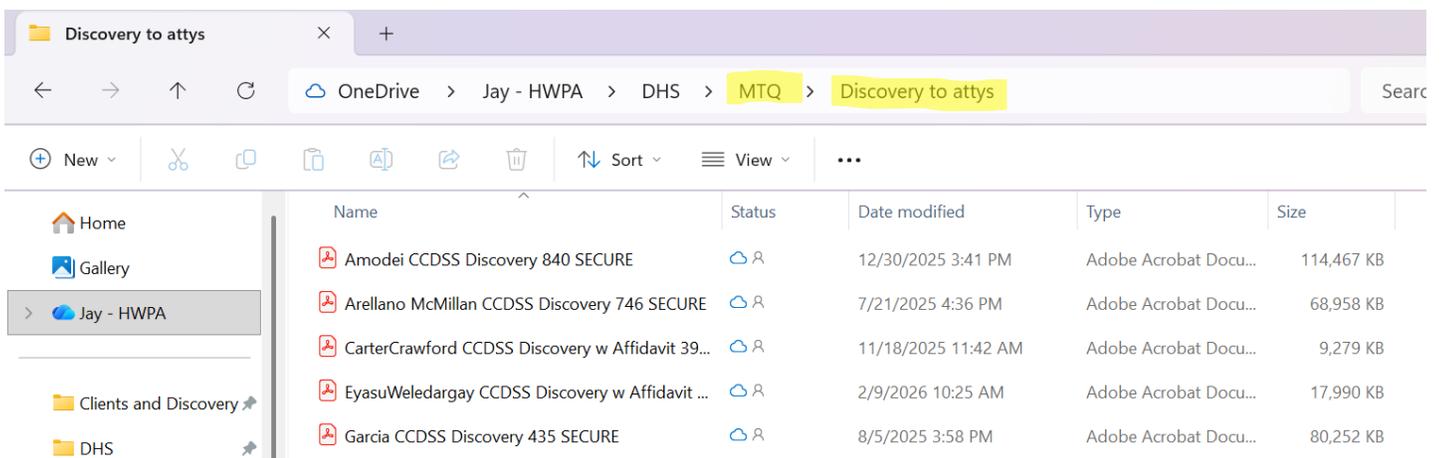
Name	Status	Date modified	Type	Size
1 8	📁	1/12/2026 2:13 PM	File folder	
1 22	📁	2/1/2026 9:05 PM	File folder	
2 12	📁	2/15/2026 11:32 AM	File folder	
2 13 Conner	📁	2/13/2026 12:07 PM	File folder	
2 26	📁	2/13/2026 11:01 AM	File folder	
2025	📁	2/12/2026 10:02 PM	File folder	
CNSC Hrsg	📁	2/9/2026 10:09 PM	File folder	
DHS Ct Dates Template	📄	2/12/2026 11:00 PM	Microsoft Word Doc...	26 KB
DHS Ct Dates	📄	2/15/2026 11:50 AM	Microsoft Excel Work...	292 KB
Expert Foundation	📄	4/20/2022 10:08 AM	Microsoft Word Doc...	17 KB
Expert Foundation	📄	7/23/2016 3:51 PM	Adobe Acrobat Docu...	154 KB
Form Reasonable Efforts to Locate	📄	7/23/2016 3:51 PM	Microsoft Word Doc...	20 KB

Electronic Storage System: We use OneDrive to store court reports for review, editing and sharing and storage for discovery.

Court reports: we save the last 6 months court reports, current court reports. By keeping these on OneDrive we can work on them remotely as well as share the final court reports with the Court for their preparation for court. The file shared with the court is a combination of the court reports that are bookmarked and protected.



Discovery and Documents: Our OneDrive DSS folder is broken down into smaller folders such as CPS/Cases/Court Dates, CPS/Discovery, etc. The Discovery folder is where we place the documents that will be accessed by parent attorney(s), litigants in civil cases or the Court. Each of the file(s) that is being provided to one of these persons is password protected for accessing and printing. Each person(s) is provided with the password for accessing the file but not the password to download or print the documents. We never lose control over our records in this manner.



Excel for Case Management: Organizing the Chaos

Why It Matters for Litigators

Our case load is data-heavy—statutory time frames, keeping track of service, discovery, witness lists, billing, and more.

Key Benefits

- **Case Timelines & Deadline Tracking**
Conditional formatting and formulas help prevent missed dates and keep teams aligned.
- **Discovery Management**
Track document production, Bates ranges, privilege logs, and review status in sortable, filterable spreadsheets.
- **Sorting & Filtering for Quick Insights**
Perfect for organizing cases, hearing types, outlining/streamlining court.

We use Excel mainly as a case/court management system. Our spreadsheet has several sheets that organize our cases over the years. The sheets accessed mostly is the pending court dates, court schedule, TPRs pending and RILs pending. Once the information that you believe is important is inputted you have the ability to sort the data in many different ways to drill down on the information needed to make decisions. For instance,

- Our pending court dates sheet starts with all the court dates for the next six (6) months and the judge assigned to the court date. This information helps me understand what court dates are available within the statutory time frame(s) the case needs to be heard. Below that block of information are headers with the court date, assigned judge, attorneys, social workers, file number, service-mom, service-dad, and then notes. The data below these headers is each open case and the date(s) it is set. The cases with multiple entries are new JA petitions or JT petitions since the JA case has a PAC and AdjDispo dates and the TPRs have the PreTPR, TPR and possibly a PPH pending.

	3/12 - SES	4/9-MGK	5/7-SES	6/4-CEW	7/9- SES	8/13-CEW
2/26 - MGK	3/26 - DBC	4/23-CEW	5/21 - DBC	6/18 -MGK	7/23-DBC	8/27-MGK

2/26/2026 MGK			Attys	CCDHS SW	Service-Mom	Service-Dad	Notes:
Flintstone	23JA001234	PPH	Gordon, Cynthia	Staci			

- I use the pending court date sheet to cut and paste into the court schedule sheet to organize the day as to when cases are going to be called. When the data is copied to the new sheet, it is sorted either in court hearing order, attorney order or SW order. The sorting in various ways guides me as to how the day should play out, as well as how the SWs and then attorneys days are going to shake out.

2/12 CEW					
Time	Case Name	Case #	Hrg Type	Attorneys	CCDSS SW
9:30-10:15	Doe	22JA123	PPH	Ben	T'Daizha
	SmithJones	23JA124	PPH	John, Megan	T'Daizha
	Willey	24JA234	PPH	Gordon, John	T'Daizha
	Rutledge	19JA189-93	MFR G'ship	John, Ben	Ashley
	VictoryShoe	25JA166-69-DBC	AdjDispo	Megan, Ben, John-UF	Josh/Destine
10:15-11:30	<i>Flinstone</i>	24JA1219-21	PPH	Valerie, Megan	Janelle
	<i>Gupka</i>	25JA2	PPH	Megan, Gordon, Ben	Caroline
	Doiley	26JA111-SES	PAC	Maddy, Megan	Brianna/T'Daizha

Word: Precision Drafting for High-Stakes Documents

Why It Matters for Litigators

Word remains the gold standard for legal drafting because it supports the structure, formatting, and accuracy litigation demands.

Key Benefits

- **Advanced Formatting for Legal Documents**
For Appeals: Automatic tables of authorities, tables of contents, numbered headings, and citation tools streamline brief writing.
 - **Track Changes & Comments**
Essential for collaborating with co-counsel, supervising attorneys, and clients while maintaining a clean revision history.
 - **Templates for Consistency**
Pleadings, motions, court reports, court orders can be standardized across a firm or practice group.
 - **Integrated Proofing Tools**
Grammar, clarity, and readability checks help polish filings before they reach the court.
- Word: is obviously a stalwart document creation software; however, it is more than a typewriter. For court reports we use Word to create exhibit stickers using the Insert tab, Tracking and Comments using the Review tab, draft templates/forms using the developer tab and create a PDF or add comments from a PDF to a document using the Acrobat tab.
 - Exhibit stickers: Click the Insert tab, click Shapes showing several options, Under Basic Shapes click the box with a T inside (this shows that text can be added to that shape. This click/selection converts your cursor to a + sign which allows you to create a box by dragging. After the box is created, a new tab shows (Shape Format) choose Shape Fill to change the background color to yellow, change the boarder if you wish and then add text. You can center the text under the Home tab, paragraph, or use the Hot Key to center of Ctl + E.

**CCDSS Ex 1
Dispo Hrg
2/20/2026**

- Tracking and Comments using the Review tab
- Draft templates/forms using the Developer tab: In an existing Word document you can add check boxes, drop down answers, combo list. We use this function in creating Court Reports and Court Orders that include the information needed under Chapter 7B for a particular hearing. Much of our court reports are Questions with Yes/No/N/A answers and when needed a block for explanation. For example: Is paternity at issue ? Yes: No: . If not, why? Click or tap here to enter text. If you want to add extra protection, then you can keep each input protected from being deleted/formatted.

Many of these templates are saved in a specific folder which I access under the File/New/Personal/CPS folder. By accessing the file this way, the original is not “edited” and a “new document” appears that you work from. If you plan to use these as templates, then you need to direct your Word to go to a specific folder. To do this go to File tab, Options, this opens a menu, click on Save, look for Default Templates Location Use: (either Browse or add the path where your templates are located)

Word, Excel, and OneDrive create a streamlined, secure, and efficient workflow for litigators:

- **Word** elevates drafting
- **Excel** organizes case data
- **OneDrive** keeps everything accessible and protected

These tools help make litigation easier, help deliver fast, accurate, and strategic representation.

JusticeText: Transcribes Video and Audio Evidence

Key Benefits

- **Automated Transcription of Court Hearings, Videos, Body-Cam, Jail Calls, and Interviews**
JusticeText uses AI to transcribe hours of footage in minutes, giving attorneys searchable, time-stamped transcripts.
- **Evidence Organization**
Upload, categorize, and tag recordings for quick retrieval during trial prep.
- **Improved Accuracy in Fact-Finding**
Searchable transcripts help identify inconsistencies, admissions, and key statements.
- **Collaboration Tools**
Share clips and transcripts with investigators, co-counsel, or experts.

Conclusion

When used together, these tools create a modern, efficient, and ethically sound legal practice:

- **Adobe/Drawboard** streamlines document workflows
- **Microsoft Products:** Word, Excel, OneDrive
- **JusticeText** unlocks the value of video/audio evidence
- **LexisNexis Protégé** elevates research and writing

Adopting these technologies is not just about convenience—it is about delivering better outcomes, improving accuracy, and positioning your practice for the future of law.