

NYSLTA
TECHNOLOGY COMMITTEE
WORK FROM HOME
HANDBOOK

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www.nyslta.org

We have entered an unprecedented time. Most of us had to leave our offices with little preparation in March, 2020. Some had stayed up to date with new technology and were prepared, others were not. By this time, most have found a way to get by. The NYSLTA Technology Committee wants to help you navigate some of the software that is out there to help you continue your work from home and even improve your product. Below, we offer recommendations for tools that can further enhance your Work from Home experience and increase your efficiency.

**These are simply suggestions of programs and technology that could help your processes. Please do your own research into each one, and if you question it's use from a compliance perspective, consult your underwriters.*

WORK FROM HOME/TEAM TOOLS

Below are tools that can help your move to Work from Home be more seamless. These are ways to continue working, as if you were in your office, but from your home. They range from remote logging into your work computer to digital phone lines to staff communication tools.

LogMeIn - <https://www.logmein.com/>

Probably the most widely used SAAS (Software as a Service) company when dealing with remote work. LogMeIn allows you to access and work from your desktop computer from anywhere in the world using a laptop, home computer, tablet or phone. LogMeIn has many different plans and can handle one user or your entire workforce.

Ring Central - <https://www.ringcentral.com/>

Ring Central is a cloud based digital phone system. Their product allows for digital phone lines which can be routed to your home or mobile phone, Online meetings with your team or clients, team/inter-office messaging and online faxes.

Slack - <https://slack.com/>

Slack is a collaboration hub that can replace email to help you and your team work together seamlessly. It's designed to support the way people naturally work together, so you can collaborate with people online as efficiently as you do face-to-face. In the program you can have multiple conversations (both individual or as a team), conduct voice or video calls and connect other apps. Excellent for communication and organization.

Microsoft Teams - <https://products.office.com/en-us/microsoft-teams/group-chat-software>

If you already use Microsoft Office/Microsoft 365, then you have access to Microsoft Teams. Teams is their teamwork hub which includes group chat, video conferencing and shared documents including word, excel, sharepoint, onenote, powerpoint and more.

G-Suite - <https://gsuite.google.com/>

G Suite is a suite of cloud computing, productivity and collaboration tools, software and products developed by Google which is very similar to Microsoft Teams. Features include gmail, google chat and google meet, google calendar, google drive and their word processing and office suite products.

ConnectWise - <https://www.connectwise.com/software/control>

ConnectWise Control is very similar to LogMeIn. Has virtually all of the same features along with very strong security which is very important when working remote.

TeamViewer - <https://www.teamviewer.com/en-us/>

Another LogMeIn alternate. TeamViewer allows for remote access so you can manage, and support computers, mobile devices, network machines from anywhere and at anytime.

REMOTE VIDEO/MEETING TOOLS

An effective approach to staying healthy in 2020 is working from home and distancing from others. Some of the most effective tools that have become ubiquitous for employees working remotely are video conferencing and instant messaging. In the title insurance industry, video conferencing and instant messaging can be useful for companies to remain both operational and productive, as it provides employees with the ability to conduct certain face-to-face meetings in a virtual manner. With these tools, remote workers can continue to easily connect with co-workers and clients when in-person communication isn't an option.

Zoom – <https://zoom.us/>

Zoom is currently a leader in modern enterprise video communications. It boasts an easy, reliable cloud platform for video and audio conferencing, collaboration, chat, and webinars across mobile devices, desktops, and smartphones. Zoom offers a video conferencing solution for desktop and mobile devices that aims to be very quick and easy to set up. It provides HD video and audio, while supporting up to 1,000 participants at the same time. Meetings can be recorded and then saved locally or to the cloud and participants can even share their screens. A free plan is available which allows an organizer to host a meeting with up to 100 participants, however, forces a cap on the meeting at 40 minutes. The next plan up is called the Pro plan and costs \$14.99 per host per month. The Pro plan allows an organizer to host meetings with up to 100 participants, provides a 24-hour meeting duration limit, 1GB of cloud recording, in addition to several admin feature controls. There are also Business and Enterprise level plans if additional hosts and features are required.

GoToMeeting - <https://www.gotomeeting.com/>

GoToMeeting is the standalone video conferencing service provided by LogMeIn and is currently one of the other big players in the video conferencing world. In addition to providing fast and reliable video conferencing, this service also provides screensharing during a meeting and is mobile-friendly. In terms of pricing, there is currently a free 14-day trial advertised on their website which then moves on to their most basic payment tier which costs \$14 per month, or \$12 per month with an annual payment. In this basic tier there is a limit of 150 participants, which is all that will be required for most businesses. If your company requires more than 150 participants a business and enterprise plan are also available.

Cisco Webex – <https://www.webex.com/>

Webex is one of the most widely used video conferencing applications in the market. There is a free conferencing plan (up to three users) that is surprisingly full featured, with HD video, screen sharing on desktop and mobile devices, and recording options. The free tier supports up to 50 participants per meeting with meeting times capped at 40 minutes and online storage limited to 1GB. However, Webex also offers three paid plans as well to suit your needs if additional features are required.

FaceTime – <https://apps.apple.com/us/app/facetime/id1110145091>

FaceTime is another solid option for video conferencing; however, this service is only available through iPhones, iPads, or Macs. It allows up to 32 people to join in on the call, giving remote workers a great option for conducting remote meetings. To use group FaceTime for video calls, your iOS software must be updated to version 12.1 or later.

Google Hangouts and Google Meet – <https://hangouts.google.com/> and <https://gsuite.google.com/products/meet/>

Google Hangouts and Google Meet are Google's video conferencing communication software products that are great for companies that fully leverage G-Suite across their operations. Although not as feature-rich as other commercial and enterprise-ready services, Google Hangouts for smaller businesses can be an effective tool for video communication. The cost can be low, depending on your team's G-Suite subscriptions, which start as low as \$6 per month per user. Google Meet is an upgraded version of Google Hangouts. Google Meet is designed around scheduled video meetings among team members, with similar features to Zoom like calendar syncing, conference room booking, and a more polished user interface.

Skype for Business – <https://www.skype.com/en/business/>

Skype for Business is a well-designed instant messaging application that also features high quality video conferencing features. Not only is the user interface easy for your staff to use, but the dial-in audio conferencing also greatly improves communication across your organization. With the robust desktop sharing function, people can now broadcast any visuals, web pages, documents, applications, and software on it, making the operation even more user-friendly.

Microsoft Teams – <https://teams.microsoft.com>

Microsoft Teams, a successor to Skype for Business, is a great video conferencing solution for companies that are already deeply embedded in the Microsoft Office suite of applications. Anyone can sign up for the free version of Microsoft Teams using a personal email address. The free tier supports up to 300 members, with guest access, one-on-one and group video and audio calls, shared files (2GB per user and 10GB per team), screen sharing, and document coloration using online Office apps.

WhatsApp – <https://www.whatsapp.com/>

At this point, WhatsApp is synonymous with the phrase "messaging app". WhatsApp is available as an app on the Web or on your smartphone and lets you send text messages, group chats, instant messaging, along with free audio and video calls with up to four people. WhatsApp messages and calls are secured with end-to-end encryption, meaning that no third-party including WhatsApp can read or listen to them.

Slack – <https://slack.com/>

Slack is one of the best-known team chat and collaboration tools. It offers a variety of features such as real-time chat for internal communication, video calls and lots of integrations. Essentially, Slack is an

instant messaging system with lots of add-ins for other workplace tools. The ease of use and reliability are two of the main elements of Slack that really stand out, as it's designed in a manner that's easy for non-technical users to pick up right away. Slack could be a great fit for your organization to stay in great communication during these crazy times

**If video conferencing is of a higher priority for your team, and relied upon quite frequently, then the investment into a higher quality webcam might be the right decision and will likely be a step above the cameras found in most laptops and smartphones. The brand Logitech makes some good high quality webcams: <https://www.logitech.com/en-us/webcams?filters=3801>*

If you already have video covered, or aren't happy with the way your built-in microphone sounds, a standalone USB microphone may be a valuable addition to your setup. While most webcams have a microphone built right in, the quality is usually subpar. Furthermore, some conference cameras don't include a mic. Here are some options to purchase a USB microphone directly via Amazon: https://www.amazon.com/s?k=usb+microphone&i=electronics&ref=bnav_search_go

E-RECORDING PROGRAMS – Please confirm with the county clerks to confirm what documents can be eRecorded.

CSC- <https://www.cscglobal.com/cscglobal/home/>

CSC eRecording services help agents comply with the best practices outlined by the American Land Title Association (ALTA), specifically Best Practice #4:

Adopt standard real estate settlement procedures and policies that ensure compliance with Federal and State Consumer Financial Laws as applicable. CSC's eRecording solutions help agents record real estate documents electronically (often within minutes), track submitted documents, address rejected recordings quickly, verify recordation, and maintain electronic records.

Simplifile- <https://simplifile.com/services/e-recording/>

Simplifile makes it easy to eRecord all of your deeds, mortgages, and other documents online. You don't have to use the mail, leave the office, or stand in line at the county – saving you time and money. If you have a PC and internet access, you have what you need to start eRecording with Simplifile.

ePN- <https://new.erecordingpartners.net/GOePN/>

With its efficient partnership network, ePN creates better communication between document creators and Jurisdictions throughout the United States. ePN makes it possible for counties of all sizes to access the proven technology of eRecording and its many benefits: faster processing, quicker turn-around times, more cost-effective transmission of documents, and more.

WORKFLOW MANAGEMENT/SCANNING OPTIONS

Evernote- <https://evernote.com/>

Evernote Business helps teams more effectively turn their ideas into action and move projects forward. As a home for all your team's work, Spaces (a product of Evernote) get everyone on the same page by

effortlessly surfacing the most relevant and up-to-date information to each member of your team. And, by saving your ideas and inspiration forever, your team won't lose work or duplicate past efforts.

Asana- <https://asana.com>

Asana has a vast amount of work from home tools that will help your business manage workflow, redundancies and automation. Asana also has tools to help your company grow with additional tools that focuses on marketing and sales.

Trello- <https://trello.com/home>

Trello is the easy, free, flexible and visual way to manage your projects and organize anything, trusted by millions of people from all over the world.

HOW TO SCAN A DOCUMENT WITH YOUR MOBILE PHONE

Notes App on your iPhone

1. Open a note or create a new note.
2. Tap , then tap Scan Documents.
3. Place your document in view of the camera on your device.
4. If your device is in Auto mode, your document will be automatically scanned. If you need to manually capture a scan, tap  or one of the Volume buttons.
5. Drag the corners to adjust the scan to fit the page, then tap Keep Scan.
6. You can add additional scans to the document or tap Save when you're done.

Scanning with an Android

1. Open the Google Drive App on your Android Phone.
2. Next, tap on the large Plus button located at the bottom right corner of your screen.
3. On the next screen, tap on the Folder option to create a new folder on Google Drive for storing your scanned Documents.
4. Next, you will see a popup asking you to provide a Name for the folder, name the folder as "Scanned Documents" or any other name that best suits your purpose.
5. Next, tap on the Scanned Documents folder that you had just created.
6. Once you are in the Scanned Documents Folder, tap on the large blue Plus button.
7. On the next screen, tap on the Scan option (this will activate or open the camera of your Android Phone).
8. Place the document to be scanned on a flat surface (table) and simply take a picture of the document by tapping on the large blue circle located at the bottom of your screen.
9. Once you take a picture of the document, you will get to see a preview. If your preview looks OK, you can save the scan as a PDF document by tapping on the Check mark icon.
10. Tapping on the Plus button, located in the bottom menu allows you to scan the next page of the document.

We hope this handbook will help you and your business in the coming weeks/months. We are all in this together and we, as an industry, need to help each other get through this trying time. To that end, please feel free to reach out to us with any questions on products mentioned or suggestions for additions to the list. We are here to help you.

Respectfully,

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