

DOCKETING AND CALENDARING CHECKLIST

DO have a formal docket control system which provides:

1. Immediate and automatic entry of dates;
2. Double checking of all entries;
3. Allowance for sufficient lead time to complete tasks;
4. Follow-up checking;
5. Backup or duplication of the main calendaring system.

DO maintain a file tickling system as a back up to your docket control system.

DO have a staff conference to discuss how to use the system and why it is so important. Make sure new employees (both attorneys and support staff) are familiar with the system.

DO use a new matter intake form, which asks the question, "What deadline dates need to be calendared?"

DO set spam or junk email filters to allow receipt of e-notices from the courts in which you practice, otherwise, you may miss an important deadline or notice. You may need to make this change at the Internet Service Provider (ISP) level and in the settings of your specific email program. This assures that neither your ISP (i.e., Comcast) nor your email program (i.e., Outlook®) will block email from the court.

DO create rules in your email program to duplicate and forward copies of court notices from the attorney-of-record to appropriate staff. Some electronic case filing systems only generate e-notices to the attorney-of-record. Firm addresses (docketing@johndoelawfirm.com) or staff email addresses may not be permitted.

DO remember to transfer all dates and events from personal calendars to your main docket control system as soon as possible. If your calendaring system is manual, consider keeping a supply of brightly-colored calendar slips on hand and USE THEM. Lawyers can carry these with them when outside the office. If you have a laptop, smartphone, tablet, or other mobile device, be sure to synchronize it to your computer and/or network as soon as you return to the office.

DO make certain your docketing calendar is easily accessible by all lawyers and staff. If your system is manual, consider color-coding entries.

DO have someone assigned to screen incoming mail for calendaring needs BEFORE the mail is distributed. For more information on proper handling of mail, see the PLF practice aids on mail handling, available online at <https://www.osbplf.org/>. (Select Practice Management, and then select Forms.)

DO encourage daily conferences between lawyers and assigned staff. Use this time to confirm new calendar items, discuss cases tickled for work, and double-check that all dates and events noted on personal calendars have been transferred to the main docket control system.

DO have a definite strategy for handling the "final reminder," which covers:

1. Illness or other unexpected absence from the office;
2. Procrastination;
3. Preventing the file or memo from getting buried on a desk;
4. Verifying actual receipt of the item at its destination.

DO NOT leave things until the last day.

DO NOT assume anything. Verify it.

IMPORTANT NOTICES

This material is provided for informational purposes only and does not establish, report, or create the standard of care for attorneys in Oregon, nor does it represent a complete analysis of the topics presented. Readers should conduct their own appropriate legal research. The information presented does not represent legal advice. This information may not be republished, sold, or used in any other form without the written consent of the Oregon State Bar Professional Liability Fund, except that permission is granted for Oregon lawyers to use and modify these materials for use in their own practices.

© 2017 OSB Professional Liability Fund