

MAIL HANDLING: PAPER FILING SYSTEM

Opening, Stamping, and Docketing

One person should be responsible for opening all incoming mail, sorting it, and date stamping it. If this person is also in charge of a central calendar or the docket system, this person should review the mail and pick out any dates or time limits stated in the mail.

Dates should immediately be entered into the system(s), and an appropriate notation made on the piece of mail. This can be accomplished by highlighting the docket date, or placing a red checkmark next to it and initialing it. If the person opening the mail is not in charge of the calendar or docket system, a docket slip should be prepared for each date or time limit, and given to the person in charge of the central calendar or docket.

Distribution

Unless the person opening the mail is the only support staff in the office, the mail should be distributed to the assistant for each attorney. Each assistant should review the mail for their assigned attorney. Dates and items of importance should be noted by the assistant. Mail should then be attached to the applicable file, and placed on the attorney's desk for review. If an item requires immediate attention, it can be handled right away. If there is nothing urgent, a reminder or tickler can be set for the file for a future date.

If possible, assistants should meet with their attorney(s) at a specific time each day to review incoming mail and tickled files. This daily meeting is an excellent time to answer questions, coordinate schedules, and delegate items to the assistant for completion. Mail should never be stacked in a pile on the attorney's desk without being attached to a file. This is the surest way for an item to be lost, misfiled, misplaced, or forgotten until a deadline passes. Likewise, if loose mail is given to staff for filing, it may sit on the staff person's desk for an indefinite period until the staff person finds time to do the filing. When filing is not done on a daily basis, an attorney may act on incorrect information, because the file is missing the most recent correspondence or documents.

Consistency

The mail handling procedures described above apply to all incoming documents and transmissions, including faxes, emails (unless saved electronically), hand deliveries, and items received by messenger.

IMPORTANT NOTICES

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