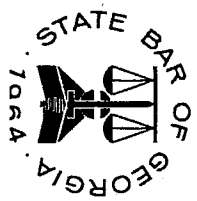


For more information on calendaring
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Calendaring Basics for the Small Law Office



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Calendaring

Basics

Whether your firm's calendaring system is automated or manual, be sure it never finds you at a loss for what is happening in your firm or missing important deadlines. Ensure the effectiveness of your calendaring by making sure you follow these calendaring basics:

- Don't just calendaring important events like hearings, deadlines, and statute of limitations expirations. Put reminders of these events on the calendar as well to let you know that you need to start worrying about these items. Some offices place all reminders (ticklers) in a separate card file or on a separate calendar. This may be helpful if one staff person is responsible for following up on reminders.
- Remember to calendaring not just what you are supposed to do, but what other people are supposed to do as well. If you request something, always put on your calendar the due date for the

response. The corollary to this is: Always incorporate a deadline into any request you make.

- Never allow a file to go back into the file cabinet without having a calendar entry associated with it.
- Don't calendaring in pencil and erase changes. Write everything in pen (assuming it's not computerized) and cross out any necessary changes. You may need this record someday.
- Place a copy of any piece of paper that refers to an action you're supposed to complete into a "tickler file" with the date that action is supposed to be completed written on the top of the paper. Store all pieces chronologically within the file and refer to the file every day to find "to-do" items for that day.
- Have all the calendaring in the office done by one person using one set of rules and one set of procedures. Generally, the attorney should not be keeping his or her own calendar, but should be given copies or printouts to take out of the office.

- Combine calendaring and mail opening functions, when possible. The secretary should open and sort the mail for the attorney, then highlight each item in the mail that requires a calendar entry to be made and initial it to show that the item has been transferred to the calendar.
- All calendaring responsibilities should be made part of a specific employee's job description. For example, note in the file clerk's job description that she must place a reminder on the calendar each time a file is opened. Similarly, note that the secretary is responsible for reading the court calendar and recording hearing dates. This will help old and new staff alike remember their obligations.
- Be sure to calendaring and schedule things as well as people. You should always indicate on your MAIN calendar when the conference rooms in your office are to be used and by whom.