

SAMPLE

INCOMING MAIL PROCEDURES

- Designate a specific place to receive incoming mail.
- Mail should be received so that client confidences will be protected. It should not be opened and laid out at the receptionist's station where clients coming in for appointments can see it.
- Give a specific person responsibility for opening incoming mail and train a backup.
- All incoming mail should be date stamped. You may want some original documents to be date stamped on a "yellow sticky" for later removal or on the back of the document. If you want this done, be sure the mail opener knows how and for what documents.
- It is usually not necessary to save envelopes. If you want the envelopes attached to correspondence, specify to the mail opener.
- Mail should be sorted for each attorney or support staff member. The attorney's secretary should further sort mail into correspondence from attorneys, clients, courts, periodicals and "junk" mail.
- A designated person should enter any court dates into the docketing system as orders are received.
- If an attorney will be out of the office for more than a day, support staff should make a daily "Mail Log" (see example attached). As much as possible, mail should be filed as received, unless it requires further attention. When the attorney returns, Mail Logs should be reviewed, after which time they may be disposed of.
- Another attorney in the office should look at the priority mail on the Mail Log and take care of any situations requiring immediate attention. Sole practitioners should have support staff look at mail and, if the attorney will not be communicating with the office daily, designate another available attorney to whom emergency matters can be referred.
- "Green cards" or other receipt of mail forms should be recorded and attached to the appropriate document in the file.
- Any returned mail or change of address should be noted and entered into the system.
- Checks should be recorded as received and immediately given to bookkeeping to process as appropriate. Deposits to trust accounts should be made daily.