

HOW TO CREATE A MASTER CALENDAR

It is recommended that law firms have a minimum of two master calendar systems, ideally one automated. The master calendar should include all important dates for each attorney and should interface with the tickler system. In this way, a lawyer is reminded of a particular event by it being on the calendar and by a “to do” task on the tickler.

The integrity of a calendar and tickler system is dependent upon creating workable, efficient and effective procedures that are consistently utilized when calendaring dates and creating tickler reminders. For instance, all events should be entered and sufficient reminder entries should be entered before the date of the event. A good general rule is a few days, a week and a month before a given date. These dates can be tailored to meet the preferred working habits of the attorney or the firm policy.

The following methods are helpful in maintaining the integrity of a master calendar and tickler system:

1. The firm should designate a person to be responsible for the calendar, along with a designated back-up. The person responsible for the calendar should open and review the mail and enter key dates onto the calendar before distributing the mail.
2. Final deadlines should be entered on several calendars, including the lawyer's, the secretary's, the master calendar and the calendar of any supervising attorney. Final dates should be specially indicated – i.e. entered in a different color, bolded or typed in all caps.
3. The lawyer and support staff should work together to determine the reminder dates that are entered on the calendars prior to the deadline. Be realistic in allowing sufficient time to complete the task, building in extra time for emergencies and other things that may draw time away from the task.
4. Lawyers and support staff need to ensure that they inform each other of any changes in dates.
5. Always create and enter follow up dates. Examples would include setting a date to confirm that a certified mail receipt was received or that a complaint was successfully served.

6. Support staff should be informed that they are to remind the attorney of all dates.
7. Both a daily and weekly print out of the calendar should be distributed to everyone.
8. The master calendar should have its' own physical "home" in a central location.

A good calendaring system is one of the essential foundations to a successful law office. A strong calendaring system allows you to complete your tasks in a timely and competent fashion, reduce your stress by keeping your practice organized and on track, avoid missed deadlines and increase your efficiency.