

## Model Calendaring and Docketing Protocol

[ORGANIZATION] shall:

1. Establish a system for calendaring, which means recording all due dates, statutes of limitations, tasks, court appearances, and appointments to a master calendar that staff can consult as they plan their work.
2. Establish a system for docketing, which means adding due dates, statutes of limitations, court appearances, appointments, and tasks to a docket—a system that will automatically remind staff about upcoming deadlines.
  - a. The docket can be connected to a calendar to minimize duplicative data entry.
3. Ensure that its calendaring system captures all relevant deadlines by
  - a. Immediately entering all external deadlines into the calendaring system;
  - b. Assigning a staff member to screen incoming mail for calendaring and docketing purposes before the mail is distributed;
  - c. Setting spam or junk e-mail filters to allow receipt of e-notices from the courts and agencies in which [ORGANIZATION]'s attorneys and legal representatives practice;
  - d. Assigning a calendaring lead on each matter who is responsible for ensuring that all relevant deadlines are properly calendared;
  - e. Requiring all team members working on any matter to periodically review the calendar to ensure that all deadlines have been properly recorded; and
  - f. Encouraging systematic conferences between attorneys or legal representatives and support staff to confirm new calendar items, discuss upcoming deadlines, and double-check that all dates and events are properly calendared.
4. Ensure that its docketing system timely alerts staff to upcoming and present deadlines by



- a. Assuring that the docketing system automatically duplicates the main calendaring system;
  - b. Designing the docketing system to provide automatic alerts reasonably in advance of deadlines to allow for adequate preparation time, the day before a deadline, and the day of a deadline;
  - c. Assigning a docketing lead on each matter who is responsible for reviewing docket alerts to ensure that they are accurate; and
  - d. Requiring staff to confirm in the docketing system whether a deadline was met.
5. Ensure all employees (including both attorneys and support staff) are formally trained on, and familiarized with, the calendaring and docketing systems;
  6. Ensure docketing and calendaring systems are easily accessible by all lawyers and support staff.