

Model Tool: Calendar control self-review checklist

Why you need this checklist:

Failure to meet a deadline, such as a statute of limitations, and other related calendaring issues continue to be the cause of the majority of legal malpractice claims in the United States. Yet despite this risk, many law firms still do not have a proper calendaring system in place.

How this checklist helps you:

This checklist will help you identify and understand the gaps in your system and the opportunities to calendar an event. Even if you're a small firm, this review is an essential step.

How to use this checklist:

Use this checklist to review how your office currently calendars and circulates information.

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Model Tool: Calendar control self-review checklist

Use this checklist to see if you have built an effective calendar system:

1. Do you have a reliable system for tracking dates and deadlines? Y___ N___
2. Does your system include at least two of these features?
 - Computerized calendar system Y___ N___
 - Manual system (tickler cards/file box) Y___ N___
 - Attorney's calendar Y___ N___
 - Matching assistant's calendar Y___ N___
3. Do you have a backup system? Y___ N___
4. Do you use calendar advance warnings prior to ultimate deadlines? Y___ N___
5. Do you follow up to see that work was actually completed? Y___ N___
6. Do you routinely enter important dates, such as:
 - Statutes of limitations Y___ N___
 - Court appearances and litigation deadlines Y___ N___
 - Procedural deadlines Y___ N___
 - Client-imposed deadlines Y___ N___
 - Discovery dates Y___ N___
 - Billing dates Y___ N___
 - Office appointments Y___ N___
 - Administrative hearings and deadlines Y___ N___

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- Real estate deadlines Y___ N___
- Deadlines set by you and your staff Y___ N___
- Dates you will be out of the office Y___ N___

7. Do you have a designated calendar clerk to run the system? Y___ N___

8. Is everyone from senior partner to receptionist trained to use the system? Y___ N___

9. Do you keep a long-range calendar for one-, five-, 10- and 20-year ticklers (for example, future work in estate or corporate files)? Y___ N___

10. Does your system produce daily or weekly activity calendars that are distributed to the responsible attorney and staff member? Y___ N___

Total: Y___ N___

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