

CLASS NUMBER AND NAME: LGN320A CALENDARING FOR THE LAW OFFICE I

TOTAL CLOCK HOURS/UNITS: 24 Hours/1 Unit

PREREQUISITES: Completion or concurrent enrollment in LGN130A Business Law I

TEXT AND MATERIALS: *No textbook. Materials will be handed out by the instructor in class.*

Required*: Laptop purchased from the Bookstore or student's own laptop computer.

See your instructor if you are interested, and qualify through financial aid, for the laptops available from the Empire College Bookstore.

If you have your own laptop, it will have to meet the system requirements for the student trial version of Abacus.

Do not download the trial version of Abacus until asked to do so by your instructor.

*Note: only paralegal and law office admin. students are required to have a laptop. Legal secretary students do not have a laptop available as part of their program. Therefore, accommodations will be made for them to use classroom computers for Abacus.

CLASS DESCRIPTION: This course is the first of two and utilizes the software program ABACUSLAW to train students in the requirements of calendaring and docketing such as document filing deadlines and court dates in the standard court systems and law offices as well as appointments, discovery, and tickler dates for law office staff. Students will learn the importance of triggering events to docket the filing deadlines for most Northern California counties. Students will primarily be utilizing the Local Court Rules for the Sonoma County Superior Court, the California Code of Civil Procedure, and California Rules of Court for class projects. Instructor will discuss calendaring deadlines for Federal Court.

CLASS OBJECTIVES: The objectives of this class are as follows:

1. To emphasize the importance of docketing procedures as they relate to California court systems by utilizing both a software program and manual calendaring processes.
2. To understand and fully operate the resources available in ABACUSLAW including case timelines in the Sonoma County Superior Court system; motion and discovery deadlines; case

management requirements; isolated required document filing deadlines and all reporting styles available within the program.

3. By the automated process available in ABACUSLAW the student will prepare calendar reports in a civil litigation action and a family law action, filing deadlines and non-litigation tickler requirements.
4. To acquire the knowledge necessary to research and implement standard calendar requirements in any law office, with or without access to a software program.

REQUIREMENTS:

This is an approximate schedule and is subject to change at the instructor's discretion. The student is responsible for any missed information and handouts due to absences. Homework includes familiarizing yourself to the Calendar and Syllabus, textbook reading assignments, and study guide homework plus diagrams, flashcards, and practice tests all when appropriate to augment learning. The time spent in preparation for or reflection on course lecture will approximate two hours outside of class for each lecture credit hour utilized by the instructor in delivery of the materials and ¼ hour outside of class for each hour of structured lab time.

**CLASS FORMAT
OVERVIEW:**

Lecture and review of Civil Litigation, Family Law, Estate Planning and Probate, Docketing, Calendaring, California Code of Civil Procedure and Rules of Court, Local Rule filing requirements for calendaring, and general case management calendaring.

Lecture and demonstration of ABACUSLAW program and overview of the assigned projects will be discussed each day. Projects will be assigned, reviewed, and submitted as scheduled by the instructor.

**CLASSROOM
ATTENDANCE:**

It is critical to the student's success to attend class every day. The instructor will consider attendance and participation in the final grade and may deduct up to 30% of the grade based on attendance and participation. The student's presence for the entire class is an important demonstration of the concept of professional demeanor and shows respect for the class. Therefore, students will only be marked present when they arrive on time and remain for the entire class session. A student must be present for a minimum of 80% of the class, or she/he will be asked to leave the class and will be withdrawn or receive a failing grade in the class.

TESTING:

There are no tests in Calendaring for the Law Office. Grades are based entirely on project assignments, homework, attendance, and participation.

GRADING POLICIES: The work submitted to the instructor will be evaluated according to the specified requirements of the assigned work and its accuracy. **No late work will be accepted and no make-up work will be permitted. Students must complete all assignments in order to pass.** Students must work individually and must turn in their own work.

Course grades for each module will be based on the average of the scores received on course assignments, homework, and attendance. No late homework assignments will be accepted by the instructor. The attached course outline provides points available and homework policies.

Weighting of grades is as follows:

100% Homework and in-class assignments. (Points will be deducted for lack of attendance and participation. See attendance policy above.)

Combined grades will be graded on the following scale:

100-90%	A
89- 80%	B
79- 70%	C
69- 60%	D
Below 60%	F

FINAL GRADE: The final grade is a letter grade based upon completing the assignments, total points on assignments, and attendance. In order to obtain an A in this class, the student must complete all assignments, have no more than two absences, and receive an average of at least 90 percent on all assignments.

**ANTICIPATED LEARNING
OUTCOMES:**

Upon completion of this course, the student will be able to:

1. Understand the importance of docketing procedures as they relate to a variety of court systems, particularly California;
2. Utilize both a software program and manual calendaring processes;
3. Understand and operate the resources available in ABACUSLAW, which includes case time lines in local court systems: trial, case management, motions, discovery and document filing deadlines;
4. Comprehend the printing styles of ABACUSLAW and all reporting options available in the software program;
5. Prepare calendar reports in ABACUSLAW;
6. Perform non-litigation "tickler" requirements;
7. Implement standard calendar requirements in any law office, with or without access to a software program.

**LGN320A –CALENDARING FOR THE LAW OFFICE I
OUTLINE – 6 WEEK MODULE**

WEEK	SCHEDULE	ASSIGNMENTS/HOMEWORK All reading from <i>Handouts</i>																		
One	Review: Civil Litigation, Docketing, Filing Requirements, CCP, Local Rules and Case Calendaring	<p><u>HW: Reading Homework</u> Handouts re calendaring (what it is and why it is so important.)</p> <p><u>Assignment #1: in class lab time (Handouts):</u> Case Management Calendar (100 points)</p> <p>Due Date: Last class, second week of mod</p>																		
Two	Review: Getting Started with Abacus	<p><u>HW: Reading Homework</u> Handouts re AbacusLaw.com Installation of AbacusLaw (at home or in class)</p> <p>Installation Instructions (Please wait until your instructor tells you to download Abacus and follow the instructions in order to download the 120 day student trial software.)</p> <p><u>Assignment #2: in class and lab time (Handout)</u> Calendaring 100 Days Before Trial (100 pts)</p> <p>Due Date: Must turn in assignment by last class on the third week of the mod</p>																		
Three	Review: Introduction to AbacusLaw, Entering Contacts, Entering New Matters/Cases, Creating Events	<p><u>Assignment #3: Lessons 1-4 (Handout) in class and lab time</u></p> <p>Lessons:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="3" style="text-align: left; background-color: #e0f0ff;">Basic Lessons</th> </tr> </thead> <tbody> <tr> <td style="width: 10%;">Lesson 1</td> <td style="width: 60%;">Introduction to AbacusLaw</td> <td style="width: 30%;">Viewing and learning about the AbacusLaw interface, including an overview of calendars, events, contacts, and matters</td> </tr> <tr> <td>Lesson 2</td> <td>Entering New Contacts</td> <td>Entering new contacts and printing a list of contacts to the screen</td> </tr> <tr> <th colspan="3" style="text-align: left; background-color: #e0f0ff;">Intermediate Lessons</th> </tr> <tr> <td>Lesson 3</td> <td>Entering New Matters/Cases</td> <td>Entering new matters/cases and associating them with clients</td> </tr> <tr> <td>Lesson 4</td> <td>Creating Events, Part 1</td> <td>Adding a staff person who can perform events; creating events, including appointments, reminders, things to do, and calls to be made</td> </tr> </tbody> </table> <p>Due Date: Must turn in assignment by last class on the fourth week of the mod</p>	Basic Lessons			Lesson 1	Introduction to AbacusLaw	Viewing and learning about the AbacusLaw interface, including an overview of calendars, events, contacts, and matters	Lesson 2	Entering New Contacts	Entering new contacts and printing a list of contacts to the screen	Intermediate Lessons			Lesson 3	Entering New Matters/Cases	Entering new matters/cases and associating them with clients	Lesson 4	Creating Events, Part 1	Adding a staff person who can perform events; creating events, including appointments, reminders, things to do, and calls to be made
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<p>Four</p>	<p>Review: Continue Creating Events (Lesson 5, Part 2) Creating Linked Names and Linked Notes, and Checking for Conflicts; Linking Documents; Using the Call Manager and the Form Generation Feature; Reports</p> <p>Overview of State and Federal Calendar</p>	<p><u>HW: Reading Homework</u> Read Article Handout: Calendaring in California State Court By Julie Goren</p> <p><u>Assignment #4: Lessons 5-8 (Handout) in class and lab time</u></p> <p>Intermediate Lessons Continued</p> <table border="1" data-bbox="488 352 1552 499"> <tr> <td>Lesson 5</td> <td>Creating Events, Part 2</td> <td>Entering a recurring event; making a rule; using the Calculator</td> </tr> <tr> <td>Lesson 6</td> <td>Creating Linked Names and Linked Notes, and Checking for Conflicts</td> <td>Associating a non-client-linked name with linked to contacts and matters; checking for conflicts</td> </tr> </table> <p>Advanced Lessons</p> <table border="1" data-bbox="488 554 1552 701"> <tr> <td>Lesson 7</td> <td>Linking Documents; Using the Call Manager and the Form Generation Feature</td> <td>Using the Call Manager feature; using the Form Generation Feature</td> </tr> <tr> <td>Lesson 8</td> <td>Reports</td> <td>Running a number of event and matter reports</td> </tr> </table> <p><u>Lessons 5-8 due last class of week five</u></p> <p><u>Assignment #5: in class and lab time:</u> Begin Final Project: Setting Up the Law Office using ABACUSLAW (100 points) Due Date: Last class of the mod – week six</p>	Lesson 5	Creating Events, Part 2	Entering a recurring event; making a rule; using the Calculator	Lesson 6	Creating Linked Names and Linked Notes, and Checking for Conflicts	Associating a non-client-linked name with linked to contacts and matters; checking for conflicts	Lesson 7	Linking Documents; Using the Call Manager and the Form Generation Feature	Using the Call Manager feature; using the Form Generation Feature	Lesson 8	Reports	Running a number of event and matter reports
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<p>Five</p>	<p>Review: Final Project Setting Up the Law Office Using ABACUSLAW</p>	<p><u>HW: Reading Homework</u> Review Section 2, pp. 31-33</p> <p><u>Continue Assignment #5: in class and lab time (Handout):</u> Continue Final Project : Setting Up the Law Office using ABACUSLAW (100 points)</p> <p>Due Date: Last class of the mod – week six</p>												
<p>Six</p>	<p>Review: Class discussion on final project - docketing questions?</p>	<p>Finish Assignment #5 -- Final Project</p> <p><u>HW: Review materials covered to date</u></p> <p>Final Project Due Last Class of the module Instructor available for review last class of the module</p>												

The instructor reserves the right to reconfigure the above with prior notice to the class. The class objectives will be met regardless of deviation from this outline.

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