



LJN'S

LEGAL TECH

Newsletter™

Volume XX, Number 12 • March 2003

Using Vision™ Court Rules To Streamline Docket Control

By Susan Sterios

My firm, Shartsis, Friese & Ginsburg LLP (SFG), San Francisco, is a mid-size law firm that specializes in litigation, real estate, business transactions and other commercial areas of law. Prior to 1999, before I began working here, our firm used a calendar system that required manual calculation and research of court rules and statutes, which was extremely time consuming. The Calendar Coordinator at that time was aware of, and had used, **CompuLaw's** Vision program and initiated the purchase and use of the program at SFG. I was hired soon after the installation and, having had several years of experience with the Vision program, was able to work quickly to streamline the attorneys' calendars. Vision has rule databases that can be purchased and incorporated to make the calendar program nearly-completely automated. A human still needs to input the dates, for example, a trial date that the Vision system uses to compute with, but many hours of research and entry are saved on every matter maintained in the Vision program.

Using this program has increased productivity and lessened the error margin quite a bit. **CompuLaw** has an entire department of lawyers that keeps the rule databases current, and they send updates to their clients regularly. The major changes are sent quarterly and if they find the need, additional

changes are sent throughout the year. **CompuLaw** rule databases are user-friendly — you can understand the summaries of the rules provided, even if you do not have a law degree, which many calendar clerks do not. Prior to using **CompuLaw's** system, there was no way of easily tracking and watching for rule changes. Our calendar clerks were required to manually recalculate dates when the rules changed, *ie* if the number of days changed as per the change in oppositions and replies to motions in the state courts. With **CompuLaw** rule databases incorporated in the Vision program, when the rules change, **CompuLaw's** databases are updated, and they automatically adjust the dates in our system. Afterwards, a report tells you what has been changed. I calendar hundreds of cases so this is a very valuable tool.

For safety's sake, the Vision program carefully tracks every addition, change or deletion in our system. There are dozens of reports that can be produced, highly flexible security options, customization of all the screens, many data filtering options and a new Web-based Portal option. The program also integrates with many other systems, including Microsoft Outlook®, Novell GroupWise® and Lotus Notes®. **CompuLaw** sends customers Vision updates approximately every quarter. The next update includes the option to customize the rules descriptions, so that these descriptions don't change when **CompuLaw** updates the rules. This will allow our attorneys to better customize the rules descriptions to suit their needs.

Currently, we use rule databases

exclusively for California district courts and the California appellate courts. We also use the FRCP [Federal Rules of Civil Procedure] database, which can be used throughout the United States in a broad sense. Most courts have their own local rules too, so we still manually calculate cases filed outside of California. **CompuLaw** does offer rules databases for all fifty states as well as CEQA, Bankruptcy and the NASD and many other specialty jurisdictions. Eventually, we may elect to use more of their databases at our firm.

In addition to Vision, our firm also uses PACER [Public Access to Court Electronic Records] and Verilaw, which is a similar program used in New York. These programs are needed for assistance in the electronic filing systems in many of our District Courts including California's Northern District.

Having a centralized calendar department with an automated system with court rules has become the norm in most mid-size and large law firms, to help with the need for an accurate calendar. Though errors can occur, they are typically due to human error. Technical problems are rare, but when they occur, **CompuLaw** has an outstanding department for technical support as well as a superb rules support department.



Susan Sterios is the calendar coordinator for the San Francisco law firm of Shartsis, Fries and Ginsburg LLP (www.sfglaw.com).

This article is reprinted with permission from the March 2003 edition of the LAW JOURNAL NEWSLETTERS - LEGAL TECH NEWSLETTER. © 2003 ALM Properties, Inc. All rights reserved. Further duplication without permission is prohibited. #055/081-03-04-0001