Clients sometimes drop into the office unannounced to ask questions, pick up documents, or leave something for the lawyer to review. Papers that arrive unexpectedly can easily be lost in the shuffle of a busy desk. Staff are encouraged to use receipt forms to aid in delivering papers to the correct person in a timely manner.

Set up a receipt form on your firm letterhead following the attached sample. If the form is printed, the client can use it to make notes for the attorney. Staff can fill out the remainder of the form.

Use the typewriter tool or form fields in Adobe Acrobat to make the form “fillable.” Staff completes the form for internal use only.

No matter how the form is used, retain a copy of the receipt in your electronic and/or paper file. You may also wish to provide a client with a copy. Besides a receipt form, some firms like to maintain a running log of all deliveries received.

**IMPORTANT NOTICES**

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# Receipt

**Any Firm PC**

## ABC Place, Suite 300 100 First Avenue

Anywhere, OR 97204

Telephone (503) 111-1111

Client Name/Matter:

Deliver To:

Received From: Received By:

Date: Time:

**RE:**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Urgent** |  | **For Your Information** |
|  | **Please Review** |  | **No Reply Necessary** |
|  | **Please Call** |  |  |

**Notes:**