

APPOINTMENTS

The attorney's support staff person (assistant) should have access to the attorney's calendar on the network or keep a duplicate of the attorney's calendar so the assistant can make appointments for the attorney. The assistant should know the approximate time the attorney normally spends on each type of situation (e.g., office conference - 30 minutes to 1 hour; trial - 1 to 5 days; depositions - 2 hours to 1 day), and the attorney's scheduling preferences (such as no office conferences before 10:00 a.m.).

If the assistant is familiar with the attorney's files, it will be easier to determine the time needed. If the assistant is not familiar with the files or the attorney's habits, the assistant should check with the attorney for an approximation of the time needed. The staff member or attorney scheduling the appointment should always get a telephone number for the client making the appointment. This allows the office to contact the client if something unforeseen comes up and the attorney must reschedule.

Keeping duplicate calendars creates the challenge of managing information being put into the calendar by different people. For example, if the attorney maintains the primary calendar, and the assistant maintains a duplicate, the attorney and assistant must establish a system to ensure that any appointment added by the attorney or by the assistant is entered into both calendars. If the attorney carries a calendar to court and enters dates, the attorney must let the assistant know of the entries upon returning to the office. Otherwise, the attorney's calendar and the assistant's calendar will not match. Similarly, if the assistant makes appointments and does not enter them into the attorney's calendar and does not let the attorney know of the new entries, the attorney will not know that the time slots have been filled.

In a paper-based system, the preferred approach is to make one person responsible for coordinating the calendars. The attorney and assistant can use Calendar Notes (see sample below) to communicate new or updated calendar entries. These notes should be printed on brightly colored paper. Attorneys can carry Calendar Notes with them when outside the office. The attorney can make entries directly on his or her own calendar and on the Calendar Note, then provide the Calendar Note to the staff member in charge of the duplicate calendar. The staff member makes the appropriate changes, ensuring that both calendars match. Changes to the calendar can also be communicated via e-mail if attorneys and staff prefer.

If the office is using a computerized calendar or case management program, the assistant should have access to the calendar and be able to make appointments or changes. An attorney using a smartphone, tablet, or other mobile device should synchronize the mobile device with the computerized calendar. The attorney should meet with the assistant daily to compare new calendar items and to discuss cases. (This is also a good time to review new mail, report on the progress of work, and assign tasks to the assistant.)

Besides the above, the assistant should check the attorney's calendar before leaving at night or upon arriving in the morning, for additions, deletions, or changes. The assistant should remind the attorney about upcoming appointments and any changes to the calendar.

Attorneys who do not allow staff to schedule client appointments create extra work for themselves. They spend a great deal of time playing telephone tag just so an appointment can be made. Clients calling in to set appointments often get upset when they cannot make an appointment right away. Although coordinating calendar entries can require extra steps, it generally pays off in improved client service.

APPOINTMENTS

| CALENDAR NOTE | |
|----------------------|-------------------|
| NAME: _____ | PHONE: _____ |
| APPOINTMENT | COURT APPEARANCE |
| DATE: _____ | TIME: _____ |
| AT OFFICE | AT OTHER LOCATION |
| COMMENTS: _____ | |
| _____ | |
| _____ | |
| TIME REQUIRED: _____ | |

IMPORTANT NOTICES

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