

# Amicus Attorney News

The Official Newsletter of Amicus Attorney

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## 1. [Legal Tech New York – September 16th & 17th, 2003](#)

**LEGAL TECH NEW YORK – September 16th & 17th, 2003**  
Hilton New York Hotel and Towers  
Amicus Attorney – Booth #221

Gavel & Gown Software Inc. will be at the LegalTech New York show on September 16th & 17th, 2003 and we'd like to invite you to be there too! Get a FREE pass for 2 Keynote Sessions PLUS unlimited access to the exhibit hall: [click here for the free pass](#).

To pre-register, simply fill out the complimentary pass and return by fax directly to LegalTech. Your badge will be available for pick-up at the show site. The exhibit hall will be open from 10:00 a.m. – 5:00 p.m. both days. For a complete list of conference sessions and happenings visit: [www.legaltechshow.com](http://www.legaltechshow.com). We hope to see you there!



### Your Step by Step Guide (5.1.1)

by Lori Berenson

This 250 page comprehensive training manual, designed for beginner and intermediate users of Amicus Attorney, is available for purchase on the Amicus Attorney web site. For a listing of topics covered and sample lessons of this easy-to-follow learning guide, [click here](#).

2. [You Have to Try This!](#)  
*Practical Tips and Tricks from Amicus Attorney Certified Consultants*



## USE AMICUS ATTORNEY TO MONITOR YOUR STATUTE OF LIMITATIONS DEADLINES

By Steven J. Best, Esq.  
Amicus Attorney Premier Consultant

My clients often look for ways to monitor Statutes of Limitation deadlines in Amicus Attorney. Using the PRECEDENTS feature of Amicus as well as one of the built in Crystal Reports will allow

LegalTech

your firm to do so effectively.

Try this:

1. At the Amicus Administrator go to CONFIGURE: CALENDAR: EVENT CATEGORIES. Add 2 new categories: SOL Reminder and SOL Deadline. Remember it is highly recommended that you get EVERYONE to exit Amicus Attorney at their workstations AND back up the database before making any changes at the Administrator (Database: Backup)
2. Now, reopen your workstation. Open a file that you know has no or very few events so that you can create and save the following Precedent. In the chosen file, go to the BRAD PAGE (right hand side of the file) called EVENTS: ALL FILE EVENTS.
3. Make a NEW To-Do (click NEW at the top of the Brad Page). Title it "Enter the Date of Injury". Select the CRITICAL box to the right of the title. Remember a CRITICAL event is a static date that can be set in the past. Remember also: Events marked critical do not carry forward on your calendar. In this case, because the Date of Injury is a static date (does not change and we do not want it to carry forward), when we check the Critical box, the Due Date option goes away. Fill in Today's Date (just for the purposes of programming the precedent – you'll be able to fill in each file's actual date of injury when you run this precedent later). CLICK OK. Your event should now appear on the brad page and be colored GREEN. Green indicates a critical/static date.
4. Create another To-Do by clicking NEW. Type in the TITLE: "SOL Runs in 1 year." Change the Category on the event to SOL Reminder. Click the LINK button on the right left side of the event window.
5. Select the first To Do that you created called "Enter the Date of Injury" as the event to which you wish to LINK.
6. The following window appears now.



**Legal Laugh**

Your monthly dose of humor...

[Missed An Issue?](#)

For past issues of Amicus Attorney News - [click here](#).

Now you have to take out your calculator. If you're in a state with a 2 year Statute of Limitations you'll want to schedule the dependent reminder event "SOL Runs in 1 year" for 365 days after the master event. If you're in a 3 year Statute of Limitations state, you'll want to schedule the dependent event for 730 days after the master event, etc.

7. Keep creating reminder events as you see fit. Remember to categorize the reminders as "SOL Reminder" and keep linking each to the ENTER THE DATE OF INJURY To-Do.

8. Finally, create the SOL Deadline event the same way as before. Calculate out the correct number of days from the Date of Injury for your state and categorize this final event as SOL Deadline. One other consideration: schedule the actual SOL Deadline date as the DEADLINE and give yourself a 14 day window. In other words, if you are in a state with a 2 year statute, make the dependent event (SOL Deadline event) appear on your calendar 716 days after the master event (Date of Injury) and make the deadline 14 days after that (total of 730 days i.e.  $365 \times 2$ ).

9. Finally, save the precedent by selecting the master and all dependent events in the brad page view and give it a name such as "Georgia SOL Precedent – 2 years" Consider keeping original team member assignments if you are in a large firm and assign the actual SOL Deadline event to a particular lawyer to prevent another user from checking the event "DONE" inadvertently. If you do keep original team member assignments, you'll need a Precedent for each "team" in your office.

10. Lastly, go to FILE: REPORTS: CALENDAR: My Events for a Selected Category. Click Preview. Type in today's date as the start date, make the end date 12/31/2020 (just an example). Type in "SOL Deadline" in the Category box. Select user name/initials and whether you want notes to appear. The report that appears will give you a list of all events on YOUR calendar that have an event called SOL Deadline. (Note: if you assigned the SOL Deadline event to another user it won't be on your calendar – you'll have to run the report from that user's

workstation)

**11.** If you use the CLIENT/SERVER edition of Amicus, a local Amicus Attorney Consultant should be able to create a custom report for you that will run the SOL Deadline report firm-wide from the Amicus Administrator. Quite frankly, this is another reason to consider upgrading to Client/Server if you're using Advanced Edition as you will have ALL events in the database that have a category of SOL Deadline and there will be little or no risk of missing a deadline.

For more information on this and any other assistance on customization and training, contact the author by e-mail at [steve@bestlawfirm.com](mailto:steve@bestlawfirm.com) or your local Amicus Attorney Certified or Premier consultant.

*Compliments of:*

Steven J. Best, ESQ  
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*Steven J. Best is an attorney and is the President of Best Law Firm Solutions, Inc., a law office practice management and software consulting firm based in Atlanta, Georgia. He has an educational background in law, accounting and economics, and consults with law offices and law departments of all sizes and disciplines throughout the United States. Steve is a certified premier consultant and trainer for Amicus Attorney, PCLaw/PCLawPro, CaseMap/TimeMap and Hot Docs.*

**Editors note:**

*Critical Events are unique to Amicus Attorney V.  
Organizer Edition users do not have an Amicus Administrator, so customization is done via the Configure option under the File drop-down menu. Organizer Edition users can create Precedents from the BRAD page 'Events > All My Events'.*



### **Legal Tips**

*Tips from Legal Industry Experts on How to Effectively Manage Your Practice*



## **ARE WE MANAGING OUR RISKS OR ARE THEY MANAGING US?**

*By Nancy Byerly Jones*

*Reprinted with permission from Lawyers Weekly USA. The full article originally appeared and is available in the July 21st, 2003 issue. [www.lawyersweekly.com](http://www.lawyersweekly.com)*

### **Why Focus on Risk Management?**

First, we keep making the same mistakes over and over and over. We let telephone calls go unreturned. We assume our memories are enough when it comes to checking for conflicts of interest. We refuse to use the systems, such as case management software, that would minimize our risks of missing deadlines. We think we are too busy to properly document our files and we talk ourselves into thinking that our loyal staff does not need further training or supervision. We do all of these things repeatedly in spite of the warnings, the seminars, the risking malpractice numbers and the ever-increasing ethical grievances filed against lawyers.

Second, we are busy people, usually overfilling our plates of to do's and failing to say "No" as often as we should. We have forgotten that the value of our "Yes"-es increases the more often we say "No." These tendencies lead to our overlooking some

basic safeguards that we can take to avoid the malpractice traps and other possible hazards of practicing law.

### **A Few Basic Risk Management Reminders**

One article can hardly begin to scratch the surface when it comes to a thorough discussion of risk management in today's law office. In this month's column, I have included a series of basic checklists in a hope that they will offer you a fairly quick way to assess whether or not your firm needs to strengthen itself in any particular areas.

(Editor's note: This article will include the Engagement Agreement Checklist – for further checklists and self-audit questions, please see the full article in Lawyers Weekly USA – July 21st, 2003 [www.lawyersweekly.com](http://www.lawyersweekly.com))

### **Engagement Agreement Checklist**

(Reminder – this checklist is not intended to be all-inclusive)

The wise lawyer knows the value of a good attorney/client engagement agreement. That does not mean that the lawyer likes doing them. Well thought out engagement agreements, however, form the foundation of a file's documentation trails. The following reminders include provisions that I strongly recommend you include in your engagement agreements.

1. Attorney / client agreements are often better received when sent in correspondence format versus a formal contract structure. Regardless of the style that is best for you and your practice areas, remind clients at the onset of the agreement that you have discussed all of these matters previously and specify the previous conference date. (i.e. "This letter will confirm our discussions of Tuesday Oct.10th, 2003, when we met at my office. Should you, however, need further clarification, or have any questions whatsoever, please let me know. If you agree this letter accurately confirms our discussions, then please sign where indicated acknowledging your receipt, agreement and understanding of our attorney / client agreement.")

2. Include a duplicate copy of the engagement agreement letter for clients to sign and return to you with a signature line provided such as:

Discussed, Understood and Agreed: \_\_\_\_\_  
(client's signature)

Date: \_\_\_\_\_

3. Specify on what basis your fee is figured (i.e. hourly basis, flat fee, value billing or contingent fee) and carefully distinguish and explain the difference between fees and out-of-pocket expenditures / costs.

4. Clearly explain if any part of a retainer or advance fee payment is nonrefundable (make sure you are in compliance with all applicable ethical rules and other regulations).

5. With certain clients remember it may be wise to include a description of services that are not being provided (i.e. in a domestic matter where the attorney is handling the custody issues, but not alimony etc...)

6. Clearly identify and itemize the responsibilities of the law firm and those of the client.

7. In addition to the responsible attorney, identify who will be working on the case, their title and their rate per hour, if applicable. – i.e. associates, legal assistants, investigators, other support staff, etc...

8. Include a reminder that no promises or guarantees have been made regarding the outcome of the case.

9. State clearly what, if any, late charges will be applied for overdue payments.

10. Explain attorney / client privilege and emphasize the importance of the client's obligation to protect confidential information as well.

11. Explain your withdrawal policy when clients fail to pay fees due or otherwise fail to cooperate.
12. Explain your procedures for returning and receiving telephone calls or attach a copy and refer to your office's telephone policy.
13. Explain to whom they can voice any suggestions, concerns or dissatisfaction if they do not feel comfortable discussing those issues with the responsible attorney.
14. Include any provisions required due to the uniqueness of the case or client.
15. End your engagement agreement by once again expressing your appreciation for having been given an opportunity to be of service.

*Compliments of:*

Nancy Byerly Jones, PLLC  
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*Attorney and mediator Nancy Byerly Jones practices law, serves as a law office consultant and runs an attorney/staff retreat center in northwestern North Carolina. She and her husband live on a mountainside ranch with their dogs, miniature donkeys and horses. For more information, please visit [www.nbjconsulting.com](http://www.nbjconsulting.com), call (828) 898-9600, or send an e-mail to [nbj@nbjconsulting.com](mailto:nbj@nbjconsulting.com).*



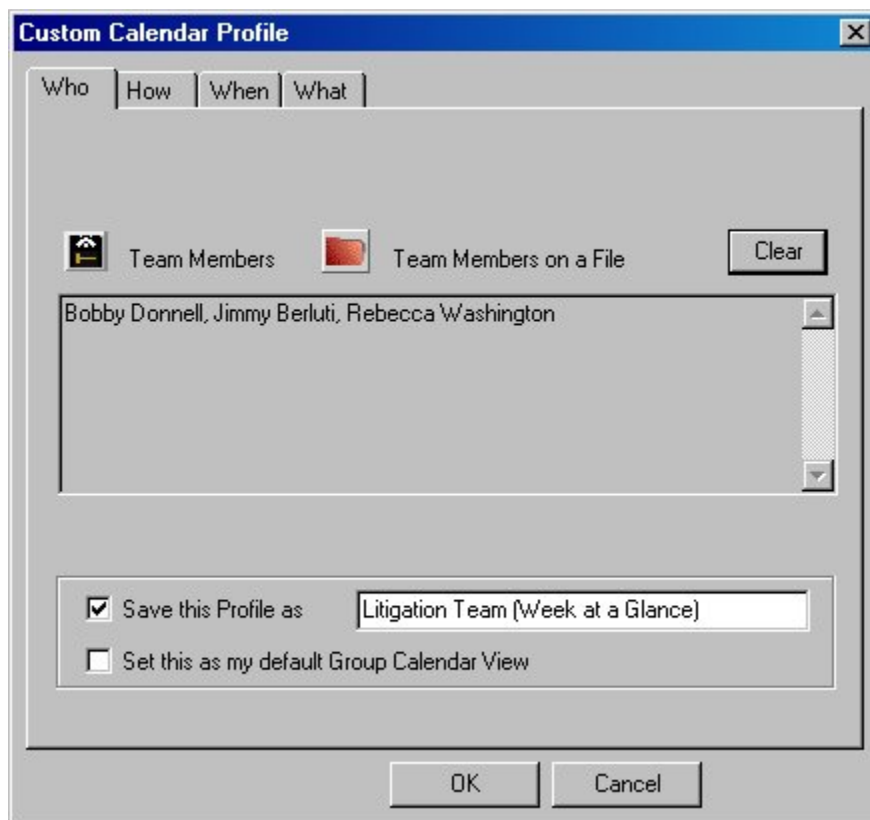
zoom

### Calendar Profiles:

Calendar profiles allow you to select detailed scheduling options for a set of team members and save them for use in the future. They provide the most flexible way to customize your calendar views.

### Creating a new customer calendar profile:

Click the Profiles button in the top right corner of the Group calendar view. The Select a Profile dialog box will appear. Click New to open a new Custom Calendar Profile dialog. Select your options for Who, How, When and What.



**Who** – Allows you to select the people and/or resources (i.e. boardroom) for the profile. If you only want to include the schedules of people assigned to a particular file, simply click the file icon and then select the appropriate file. The names of the people assigned to that file will appear in the center text box and will be included in the profile.

**How** - Choose options to display the Group calendar as a One Day Combined, Range of dates or Month view. You also have an option to specify the number of columns that you wish to have displayed without having to scroll the screen.

**When** – You can specify which date you want to view by choosing a specific date or date range or set the profile to search for a date when the selected people are available to meet. To do this you need to set a date to begin the search, a time to search between for each day and a length of time to search for. The Group calendar will display the first day available according to your criteria.

**What** – Choose what type of appointments and to dos you want to see displayed, even filter by the event category.

Name and save the profile you have created so you will be able to easily identify it and re-use it. Choose any of the profiles you have saved in Amicus Attorney as your default profile so every time you open the group view in the calendar, this particular

profile will be displayed.

Profiles are handy not just for seeing other people's calendars, but they also allow you to customize your own calendar views. If you want to see all of your court appointments for the next two weeks, or maybe you need to see all of your critical events for this month. It's easy with the profiles option in the group calendar.

### **Personal Information:**

Your personal information is always secure, even from others using the group calendar. If you mark an event as personal, then others looking at the group calendar will only see that your time is booked off, but not the details of your appointment. Of course, when you schedule an event that pertains to a particular matter, then the details of the appointment will be available to the other team members on that file. (Client/Server Edition users have additional access controls to limit who can see and even who can edit certain information.)

#### *Note on Managing Resources:*

*Booking a conference room or some audio-visual equipment at the same time as you schedule your meeting is easy in Amicus Attorney. Advanced Edition users can create and manage up to 5 shared resources, and Client/Server Edition users can have up to 25. These are created by your Amicus Administrator and are then accessible within a user's calendar or when creating calendaring events. To create shared resources you will need to open Amicus Administrator, click Configure > Other > Shared Resources. Enter the resources available in your office, then click OK to accept your changes. When creating a new event, you will be able to add one or more of these shared resources along with the team members.*

## **YOUR LEGAL LAUGH**

Your monthly dose of humor...

A small town prosecuting attorney called his first witness to the stand in a trial - a grandmotherly, elderly woman. He approached her and asked, "Mrs. Jones, do you know me?"

She responded, "Why, yes, I do know you Mr. Williams. I've known you since you were a young boy. And frankly, you've been a big disappointment to me. You lie, you cheat on your wife, you manipulate people and talk about them behind their backs. You think you're a rising big shot when you haven't the brains to realize you never will amount to anything more than a two-bit paper pusher. Yes, I know you."

The lawyer was stunned. Not knowing what else to do he pointed across the room and asked, "Mrs. Williams, do you know the defense attorney?" She again replied, "Why, yes I do. I've known Mr. Bradley since he was a youngster, too. I used to baby-sit him for his parents. And he, too, has been a real disappointment to me. He's lazy, bigoted, he has a drinking problem. The man can't build a normal relationship with anyone and his law practice is one of the shoddiest in the entire state. Yes, I know him."

At this point, the judge rapped the courtroom to silence and called both counselors to the bench. In a very quiet voice, he said with menace, "If either of you asks her if she knows me, you'll be jailed for contempt!"

Compliments of [www.comedy-zone.net](http://www.comedy-zone.net).



### **FAQs - Frequently Asked Questions**

*Our Customer Service Team Provides Answers to Some Common Technical Questions*



**My Amicus Attorney program is linked with PCLaw and I have closed my old files in PCLaw. Do I have to close the files in Amicus and if so how is that done?**

Yes, if you have closed old files in PCLaw it is necessary to close all the corresponding linked files in Amicus Attorney as well. The correct method for doing this is by simply going into each of those closed files in Amicus Attorney and changing the file status to 'closed' and changing the billing category to 'non-billable'. When you change the billing category to 'non-billable' you will be prompted as to whether you wish to exchange the file with PCLaw, to which you will click 'no'. Once that is done, depending on which version of PCLaw you have, you may get a check box that states that it will 'Exclude this File from the Accounting Link'. This will prevent any potential problems running the link if you ever need to re-initialize it in the future.

## **6. Amicus Attorney Premier Consultants** *Training, Events and More!*



Amicus Attorney Premier Consultants are professionals who are nationally qualified to sell and install all Amicus Attorney products and to provide their customers with on-site training and support.

### **Training Programs Offered by our Premier Consultants:**

Here are some of the training sessions being offered by some of our Premier Consultants. For more information or to register for a class, please contact the consultant firm directly. All times listed in EST unless otherwise indicated.

### **CLASSROOM TRAINING:**

#### **Best Law Firm Solutions Inc.**

Atlanta, GA  
 (770) 998-3800  
[www.bestlawfirm.com](http://www.bestlawfirm.com)

For more details, visit their [web site](#).

Date	Time	Training Session	Location
September 18th, 2003	9:00 am	Advanced Amicus Attorney Workshop	Atlanta, GA
September 19th, 2003	9:00 am	The Amicus Administrator Workshop	Atlanta, GA

#### **TQS Solutions, Inc.**

Morganville, NJ  
 (732) 972-8082  
[www.TQSSolutions.com](http://www.TQSSolutions.com)

For more details, visit their [web site](#).

Date	Time	Training Session	Location
September 16th, 2003	Session 1 - 9:00 am	Amicus Attorney "What's New in Version 5.1.1" and "Most Useful Features"	Morganville, NJ
September 16th, 2003	Session 2 - 1:30 am	Amicus Attorney "Administrator Training Version 5.1.1 Customization and Backup Options"	Morganville, NJ
September 30th, 2003	Session 1 - 9:00 am	Amicus Attorney "What's New in Version 5.1.1" and "Most Useful Features"	Morganville, NJ
September 30th, 2003	Session 2 - 1:30 am	Amicus Attorney "Administrator Training Version 5.1.1 Customization and Backup Options"	Morganville, NJ

### **ONLINE & CD-ROM TRAINING PROGRAMS:**

## CD-ROM TRAINING

### 2b1 Inc.

San Francisco, CA  
(415) 284-2221  
[www.2b1inc.com](http://www.2b1inc.com)

Amicus Attorney V Basic Training: PC Desktop training for the Amicus Attorney user. The easy-to-follow animation covers the most used functions in Amicus Attorney. This downloadable training is user-friendly and very affordable.

To download a copy or get more information, visit their [web site](#).

CD-ROM - Amicus Attorney V Basic Training
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## WEB BASED TRAINING

### ProBill Law Firm Solutions

Boca Raton, FL  
(800) 299-9177  
[www.probill.net](http://www.probill.net)

For more details, visit their [web site](#).

Date	Time	Training Session	Location
Flexible Dates	9:00 am 11:00 am 1:00 pm 3:00 pm or 5:00pm Weekend and late nights available.	eClass Training (Web Based training) - <i>choose from:</i> Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	Web based - You can take eclasses directly from your own computer.
September 8th, 2003	3:00 pm	<b>TRN201 Amicus Attorney - Basics</b> Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
September 10th, 2003	3:00 pm	<b>TRN202 Amicus Attorney - Advanced Calendar</b> Court rules, attaching actions to a calendar event such as generating a document or sending an email, working with the group calendar and more	Web based
September 12th, 2003	2:00 pm	<b>TRN203 Amicus Attorney - Document Assembly</b> Merge information from Amicus Attorney into your documents while linking the document to a File for future reference	Web based
September 15th, 2003	3:00 pm	<b>TRN204 Amicus Attorney - The Library</b> Organize your research materials for easy retrieval, i.e., word processing documents, spreadsheets, websites, paid services.	Web based
September 17th, 2003	3:00 pm	<b>TRN207 Amicus Attorney - ComCenter</b> Everything you need to know about managing emails in Amicus including attaching emails to Files and Contacts. This class also covers other functions of ComCenter namely sending interoffice messages and initiating phone calls.	Web based
September 24th, 2003	3:00 pm	<b>TRN205 Amicus Attorney - Timeslips Link</b> Use Amicus Attorney to track your time as you work then transfer it to Timeslips for billing. Exchange contact information between the programs.	Web based
September 30th, 2003	2:00 pm	<b>TRN206 Amicus Attorney - QuickBooks Link</b> Use Amicus Attorney to track your time as you work then transfer it to QuickBooks for billing. Exchange contact information between the programs.	Web based

**Amicus Assembly Webinar Training – offered by GhostFill Technologies Inc.**

GhostFill Technologies  
 Oakville, ON  
 (888) 368-6549  
[www.ghostfill.com](http://www.ghostfill.com)

For more details, please contact [jeaninehoward@ghostfill.com](mailto:jeaninehoward@ghostfill.com).

Date	Time	Training Session	Location	Trainer
September 15th, 2003	10:00am – 1:00pm	Basic Developer Training	Web based	Paul Marvin, Intelligent Words Inc.
September 16th, 2003	12:30pm – 3:30pm	Basic Developer Training	Web based	Paul Marvin, Intelligent Words Inc.
September 17th, 2003	10:00am – 1:00pm	Advanced Developer : The Amicus Link	Web based	Paul Marvin, Intelligent Words Inc.
September 18th, 2003	12:30pm – 3:30pm	Advanced Developer : The Amicus Link	Web based	Paul Marvin, Intelligent Words Inc.
October 20th, 2003	10:00am – 1:00pm	Basic Developer Training	Web based	Paul Marvin, Intelligent Words Inc.
October 21st, 2003	12:30pm – 3:30pm	Basic Developer Training	Web based	Paul Marvin, Intelligent Words Inc.
October 22nd, 2003	10:00am – 1:00pm	Advanced Developer : The Amicus Link	Web based	Paul Marvin, Intelligent Words Inc.
October 23rd, 2003	12:30pm – 3:30pm	Advanced Developer : The Amicus Link	Web based	Paul Marvin, Intelligent Words Inc.
November 17th, 2003	10:00am – 1:00pm	Basic Developer Training	Web based	Paul Marvin, Intelligent Words Inc.
November 18th, 2003	12:30pm – 3:30pm	Basic Developer Training	Web based	Paul Marvin, Intelligent Words Inc.
November 19th, 2003	10:00am – 1:00pm	Advanced Developer : The Amicus Link	Web based	Paul Marvin, Intelligent Words Inc.
November 20th, 2003	12:30pm – 3:30pm	Advanced Developer : The Amicus Link	Web based	Paul Marvin, Intelligent Words Inc.

## **EVENTS**

You can also visit our Premier Consultants at these events across the country...

### **SEPTEMBER 2003**

Date	Event	Location	Exhibitor
September 11th – 13th, 2003	<p>State Bar of Georgia            1st Annual Solo and Small Firm Institute and            Technology Showcase</p> <p><a href="http://www.gabar.org/soloshowcase.asp">http://www.gabar.org/soloshowcase.asp</a></p> <p>Featuring: Practice Management Shootout Sept.12th, 2003 at 2:40pm</p> <p>Steven J. Best, Esq. of Best Law Firm Solutions will be a featured speaker at the Georgia Bar's 1st Annual Solo and Small Firm Institute and Technology Showcase. Among his speaking engagements at the seminar, Steve will be participating in the Practice Management Shootout demonstrating the benefits of Amicus Attorney over competing products. The shootout is scheduled for Friday, Sept. 12 at 2:40 PM - Savannah Marriott Riverfront- 100 General McIntosh Blvd., Savannah, GA (912) 233-7722.</p> <p>Best Law Firm Solutions will also be exhibiting at the event.</p> <p>For more information or to register for the program, please contact Georgia ICLE at 1-800-422-0893.</p>	Savannah, GA Savannah Marriott Riverfront	Best Law Firm Solutions Atlanta, GA
September 16th & 17th, 2003	<p>LegalTech New York            Amicus Attorney will be exhibiting from booth #221.</p> <p><a href="http://www.legaltechshow.com">www.legaltechshow.com</a></p>	New York, NY Hilton NY Hotel and Towers	Amicus Attorney

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