MAIL HANDLING

Opening, Stamping, and Docketing

One person should be responsible for opening all incoming mail, sorting it, and date stamping it. If this person is also in charge of a central calendar or the docket system, this person should review the mail and pick out any dates or time limits stated in the mail.

If scanning mail into digital form, each client or matter should have a distinct electronic file where scanned mail is kept along with other electronic documents. For information on scanning documents, see the PLF practice aid, *Checklist for Scanning Client Files*, available on the PLF website, www.osbplf.org. Click on the Services tab > CLEs & Resources > Practice Aids > Paperless Office and Cloud Computing.

Dates should immediately be entered into the system(s), and an appropriate notation made on the piece of mail. This can be accomplished by highlighting the docket date, or placing a red checkmark next to it and initialing it. If scanning mail into your system, notations may be made on the document before or after scanning into the electronic file. To make a notation before scanning, highlight the docket date, or place a red checkmark next to it and initial it. Then scan the document. To make a notation after scanning, consider using a PDF program (e.g., Adobe Acrobat) to create a stamp. The stamp can be applied to documents after scanning, noting that dates were entered into the system(s). The instructions below explain how to create a “Received” stamp using Adobe Acrobat:

To create a “Received” stamp in Adobe Acrobat:

1. Choose “Tools” from the Acrobat Toolbar.
2. Click “Stamp” from among the tool choices.
3. Next, look for the options “Stamp,” “Stamps Palette,” and “Custom Stamps” near the top of your screen, below the toolbar.
4. Click the drop down arrow next to “Stamp,” and then select “Dynamic.”
5. Choose “Received.”
6. Enter the identity information to appear on your stamp.
7. Click “Complete.”

Once created, follow steps 1-5 above to select and use your “Received” stamp. Next, place the cursor in the PDF document where you want stamp to appear. Click the mouse to place the stamp. Save your changes.

If the person opening the mail is not in charge of the calendar or docket system, a docket slip should be prepared for each date or time limit, and given to the person in charge of the central calendar or docket.

Distribution

Unless the person opening the mail is the only support staff in the office, the mail should be distributed to the assistant for each attorney, attached to the applicable file, and placed on the attorney’s desk for review. If scanning into the system, mail should be sent electronically to the assistant and the attorney. Each assistant should review the mail for their assigned attorney. Dates and items of importance should be noted by the assistant. If an item requires immediate attention, it can be handled right away. If there is nothing urgent, a reminder or tickler can be set for the file for a future date.

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If possible, assistants should meet with their attorney(s) at a specific time each day to review incoming mail and tickled files. This daily meeting is an excellent time to answer questions, coordinate schedules, and delegate items to the assistant for completion. Mail should never be stacked in a pile on the attorney's desk without being attached to a file. This is the surest way for an item to be lost, misfiled, misplaced, or forgotten until a deadline passes. Likewise, if loose mail is given to staff for filing, it may sit on the staff person's desk for an indefinite period until the staff person finds time to do the filing. When filing is not done on a daily basis, an attorney may act on incorrect information, because the file is missing the most recent correspondence or documents.

Document or practice management software can greatly facilitate electronic mail handling and review. These programs can store scanned mail and documents directly in the associated electronic file rather than in the attorney's email inbox. Once in the program, mail can then be backed up, protected from deletion, flagged for follow-up, and sorted by various criteria (date received, client, matter, description, or status: reviewed, not reviewed, etc.).

Consistency

The mail handling procedures described above apply to all incoming documents and transmissions, including faxes, emails (unless saved electronically), hand deliveries, and items received by messenger. If scanning documents, establish a protocol for the proper disposition of paper documents once scanned. As a general rule, keep original documents whose authenticity may be disputed, or those paper documents with particular legal importance (i.e., original signed contracts, original executed wills, etc.). Paper documents not meeting this or other criteria can be shredded or forwarded to the client after scanning. Email messages should be saved in electronic form. For more information on electronic retention of email, see the PLF practice aid, *Documenting Email as Part of the Client File.*