PL-1502: LAW OFFICE TECHNOLOGY

Cuyahoga Community College

Viewing: PL-1502 : Law Office Technology
Board of Trustees:
March 2021

Academic Term:
Fall 2021

Subject Code
PL - Paralegal Studies

Course Number:
1502

Title:
Law Office Technology

Catalog Description:
Designed for student already conversant with basic functions of word processing, presentation software, database management, and spreadsheet design. Student will perform advanced word processing, spreadsheet and presentation operations to create and manage legal documents and files. Focus on use of computers related to paralegal functions in timekeeping, docket control, litigation support, and case management. Activities constructed to replicate law office experiences and tasks, including E-Discovery fact-finding simulations.

Credit Hour(s):
3

Lecture Hour(s):
3

Requisites

Prerequisite and Corequisite
IT-1090 Computer Applications, or departmental approval: equivalent experience or skills.

Outcomes
Course Outcome(s):
Utilize advanced techniques in presentation software found in legal entities by creating sophisticated legal documents in Word; editing and combining documents in Adobe Acrobat; legal document assembly; budgetary spreadsheets and charts in Excel, including the use of MailMerge; animated presentations in PowerPoint, including the creation of a moving vehicle traffic accident; and the production of trial exhibits in Sanction.

Objective(s):
1. Demonstrate use of software such as MS Word and MS Excel in order to produce legal documents frequently encountered in the practice of law.
2. Use Word or other word processor program to produce complex legal documents, such as pleadings or appellate briefs.
3. Utilize document assembly software to merge templates utilized by law firms with client specific information.
4. Create a complex, animated traffic accident presentation, suitable for trial exhibition, which utilizes transitions and custom animations.
5. Create templates for standard law office documents, such as retainer letters.
6. Prepare a table of authorities electronically.
7. Demonstrate use of the merge feature of a word processing program to create mailing labels and letters.
8. Prepare law firm budgets using appropriate software.
9. Develop a computerized "slide-show" presentation using a program such as Microsoft PowerPoint.

Course Outcome(s):
Use websites to research cases, gather facts and data, submit court documents through e-filing software; create conflict of interest validation using databases associated with a law firm, through efficient and effective research methods.

Essential Learning Outcome Mapping:
Information Literacy: Acquire, evaluate, and use information from credible sources in order to meet information needs for a specific research purpose.

Objective(s):
1. Identify and utilize appropriate legal websites to provide primary and secondary law sources pertaining to legal research.
2. Identify and utilize appropriate websites to research factual data to substantiate discovery.

Course Outcome(s):
Create and apply billable hours and applicable billable costs to clients through legal accounting software such as TimeSlips and Clio; utilize this same legal software to perform office management functions such as setting up meetings, reserving conference rooms and establish tasks and priorities.

Objective(s):
1. Identify the benefits of computerized timekeeping and billing.
2. Become proficient in calendaring information and performing conflicts checks.
3. Enter and check dockets using a calendaring program.
4. Organize work and establish calendar priorities.
5. Create and analyze productivity and efficiency reports utilizing computerized billing software.
6. Identify the benefits of computerized docket control.
7. Prepare client statements using computerized billing software.

Course Outcome(s):
Apply and practice Cuyahoga County Local Rule of Civil Procedure and Ohio Rule of Civil Procedure in E-Discovery of electronic stored information, through the use of databases, folders and files.

Objective(s):
1. Utilize the Cuyahoga County Court of Common Pleas electronic filing system to demonstrate understanding of its requirements.
2. Comprehend, recognize, and explain the E-Discovery requirements contained in the Ohio Rules of Civil Procedure.
3. Identify and extract factual information from electronically stored documents, such as emails electronic files.

Course Outcome(s):
Input documents, photographs, emails, and facsimiles into the litigation support program of CaseMap and TimeMap, and annotate, analyze these files to assist an attorney in trial or settlement preparation; search, review, organize, produce and share litigation documents generated through E-Discovery.

Objective(s):
1. Locate specific passages of documents in a litigation setting.
2. Develop a filing system including the use of scanned documents.
3. Access client file information using document management programs such as CaseMap and TimeMap.

Methods of Evaluation:
1. Case studies
2. Tests
3. Quizzes
    a. Outlook
    b. E-Filing
4. Projects
    a. Word Project - Student will perform the following functions: redaction, variable margins, variable line spacing, line-numbering, symbols, headers/footers, footnotes, and watermarks.
    b. Intermediate Word Project - Student will perform the following functions: .pdf creation, use of track changes, saving of final document after edits of track changes, compare documents, and tables of authority.
    c. Advanced Word Project - Student will replicate a document which utilizes headers and footers, section breaks, tabs, tables and advanced formatting.
    d. Excel Project - Student will perform the following functions: budgetary form for a law firm, subtotals, "paste" and "paste link" attributes, and create a mail merged letter to various clients using data from a workbook.
    e. Advanced Excel Project - Student will utilize various functions and formatting, including conditional formatting.
    f. PowerPoint Project - Student will perform the following functions: animations of text, animations of picture, slide transitions.

g. Advanced PowerPoint Project - Student will perform the following functions: create a master slide using a picture from Google Maps, custom animation using various speeds, advanced slide transitions, animations "with previous" and "after previous."

h. Adobe Acrobat - Student will upload and edit a .pdf file, modifying the text and headings of a document, as well as combining two .pdf documents into one and modifying the page numbers of the document.

i. Document Assembly Project - Student will modify a Word document to create an interview form for specific data and import the specific data into the modified document to create a custom document.

j. Case Management Project - Student will utilize two case management programs to perform the following functions: create a new timekeeper in the software, create contact information for company and client, create a matter, link the matter to the client, create a new bank account for financial transactions of the client, create a retainer for the client, create a relationship with an outside person, create tasks, calendar events, note entries, communication entries, and expense entries; import a document and an outside email into the matter, create reports for the client using the software, create an invoice for the client, and demonstrate a change in the retainer after payment by the client.

k. Practice Management Project - Student will perform the following functions: create facts associated with a matter, link the facts to matter, create relationships between facts and legal issues, run reports from the software.

l. E-Filing Project - Student will create a new case utilizing e-filing software, properly designating service instructions for defendant(s), identifying addresses of all parties, and attaching a .pdf file to the new case filing.

m. Conflict of Interest Project - Student will identify potential conflicts of interests from a database using information supplied to the student. Student will also identify information from local dockets and perform social media searches on the names.

n. Trial Presentation Project - Student will create trial exhibits from PowerPoint slides, photographs, and depositions, marking the image with a trial exhibit stamp and highlighting pertinent parts of the images.

o. Legal Website Project - Student will identify and analyze information from the United States Supreme Court website, the Ohio Supreme Court website, local court dockets, property records from the county auditor"s site, and images of deeds from the county recorder"s site.

Course Content Outline:

1. Word
   a. Advanced Formatting
      i. Automatic paragraphs
      ii. Show formatting
      iii. Reveal formatting
      iv. Headers and footers
      v. Section breaks
      vi. Line numbering
      vii. Symbols
      viii. Redacting sensitive information
      ix. Watermarks
      x. Tabs
   b. References
      i. Endnotes and footnotes
      ii. Tables of authorities
   c. Protecting documents
      i. Word - restrictions
      ii. Saving as Adobe PDF
         1. Restricting rights
   d. Review
      i. Track changes
      ii. Entering comments
      iii. Compare documents
      iv. Creating a template
2. Excel
   a. Data
      i. Sort
      ii. Subtotals
      iii. Mathematical functions
      iv. Formatting, including conditional formatting
   b. Pasting a chart from Excel to Word
      i. Paste
      ii. Paste Link
   c. Mail Merge
      i. Data in Excel
3. PowerPoint

    a. Setting up a ribbon
    b. Using blank layouts
    c. Word Art
    d. Using transitions
    e. Clip Art
       i. Grouping
       ii. Ungrouping
    f. Adding animation
       i. Modifying animations
       ii. Reordering animations

4. Document Assembly Software
    a. Downloading Software
    b. Creating a library
    c. Creating a template
       i. Using an existing Word document as a template
    d. Editing the template
       i. Text fields
       ii. Date fields
       iii. Number fields
    e. The interview
       i. Assembling the document

5. Creating a Traffic Accident Using PowerPoint
    a. Downloading a Google Map onto a slide
    b. Creating a Master Slide for future slides
    c. Utilizing clip art onto a slide
    d. Entering text onto the slide
    e. Creating transitions from slide to slide
    f. Utilizing custom animations to show car movement

6. Clio
    a. Creating contacts
       i. New Company
       ii. New Person
    b. Creating matters
    c. Creating bank accounts
    d. Adding new transactions
    e. Adding relationships
    f. Creating tasks
    g. Calendar entries
    h. Notes
    i. Entering expenses
       i. Time entries
       ii. Costs
    j. Communications
    k. Clio Connect
    l. Reports
       i. Trust Ledger Report
       ii. Work in Progress Report
       iii. Productivity by User Report
    m. Bill generation
       i. Create draft bill
       ii. Approve draft bill
       iii. Create final bill
    n. Post payment to ledger
    o. Verify Account Balances

7. Sage TimeSlips
    a. Downloading Sage Timeslips
    b. Creating a new timekeeper
    c. Creating an accounts receivable transaction
       i. a. Entering a payment

       d. Entering a new client
          i. Entering information about the client
       e. Creating a new expense type
       f. Entering an expense transaction
       g. Entering a new time slip
          i. Using the timer function

8. E-Filing
       a. Overview of E-Filing requirements in the Cuyahoga County Court of Common Pleas
       b. Create a new filing using the Tri-C E-Filing software
       c. Enter supporting data (Plaintiff"s information and Defendant"s information)
       d. Attach .pdf file to filing
       e. Identify and attach service instructions for clerk
       f. Identify designation of filing for clerk
       g. Submit "payment" for filing through software

9. AD Summation iBlaze
       a. Creating a new case
       b. Working within a case
          i. Issues
          ii. Names
          iii. Transcripts
          iv. Searching
       c. Organizing a case

10. J. CaseMap
       a. Downloading CaseMap
       b. Creating a record
          i. Facts
          ii. Persons
          iii. Documents
          iv. Issues
       c. Linking facts
       d. Linking issues
       e. Generating a standard report

11. TimeMap
       a. Downloading TimeMap
       b. Review of visual examples
       c. Creation and editing of fact boxes
       d. Modifying the timescale
       e. Timeline view vs. Spreadsheet view
       f. Importing a case from CaseMap
       g. Exporting TimeMap to PowerPoint
       h. Exporting TimeMap to .pdf

12. Sanction
       a. Downloading Sanction
       b. Creating a new case
       c. Uploading a document
          i. SmartDraw
          ii. PowerPoint
          iii. Word
          iv. pdf files
       d. Viewing documents
          i. Zoom
          ii. Pinpointing information
          iii. Redacting information
       e. Using Sanction for exhibits in a trial
          i. Marking exhibits
          ii. Tagging an exhibit
          iii. Preparing a presentation
          iv. Using presentation mode

13. Legal Websites

    a. United States Supreme Court
       i. Docket search
       ii. Oral arguments
       iii. Rules
       iv. Opinions
    b. United States Code
       i. Searching the code
    c. United States Rules of Civil Procedure
       i. Searching the rules
    d. United States Bankruptcy Court - Northern Ohio
       i. Bankruptcy forms
       ii. Bankruptcy fees
    e. United States Federal Court - Northern Ohio
       i. Accessing Pacer
    f. Supreme Court of Ohio
       i. Attorney Directory/Information
       ii. Docket Search
       iii. Opinions
    g. Ohio Revised Code
       i. Search the code
    h. Ohio Administrative Code
       i. Search the code
    i. Cuyahoga County Court of Common Pleas
       i. Docket search
          1. Criminal
          2. Civil
    j. Cuyahoga County Auditor"s Office
       i. Property information
          1. Search
             a. Information
             b. Transfer history
             c. Valuation
             d. Property details including sketch of the property
             e. Taxes
                i. Balance owed
       ii. Transfer of deeds
          1. Search
          2. Image of recorded deed
    k. N. E-Discovery
       i. Identify discrepancies between files contained in folders
       ii. Identify discrepancies between Excel spreadsheets
       iii. Identify discrepancies in emails
       iv. Manipulate data and create reports in Access
       v. Identify discrepancies in Word files
       vi. Identify sounds and images in an audio/video file

14. Conflict of Interest Data Review
    a. Identify potential conflicts of interest with "clients" utilizing an Access database of "clients"
    b. Research and identify information contained in various city and county dockets
    c. Perform "Google" searches on individuals contained in dockets

15. Adobe Acrobat
    a. Convert a Word document to a .pdf and a .pdf document to Word
    b. Edit a .pdf document
    c. Combine a .pdf document.

Resources

Thomas F. Goldman. *Technology in the Law Office.* 4th ed. Columbus, Ohio: Pearson, 2016.

George E. Guay III. *Law Office Technology.* New York: Wolters Kluwer, 2014.

Matthew S. Cornick. *Using Computers in the Law Office*. Eighth Edition. Stamford, Connecticut: Cengage, 2019.

Dorian S. Berger, Anthony T. Mann. *The Paralegal's Guide to the Microsoft Office System.* Greenland, New Hampshire: Mann Publishing Group, 2004.

Resources Other

1. Software - Applications: MicroSoft Office (Outlook, Word, Excel, PowerPoint) MicroSoft, Inc. (425-703-6214), www.microsoft.com (http://www.microsoft.com).
2. Website - E-Filing and Attorney Portal, Cuyahoga County Clerk of Courts - https://bblearn.tri-c.edu/webapps/blackboard/execute/content/file?cmd=view&mode=designer&content_id=_3553402_1&course_id=_30569_1&framesetWrapped=true (https://bblearn.tri-c.edu/webapps/blackboard/execute/content/file/?cmd=view&mode=designer&content_id=_3553402_1&course_id=_30569_1&framesetWrapped=true).
3. Website - E-Discovery 101: Gain a solid understanding of the basics - https://www.youtube.com/watch?v=gUdQAIgxJ5Y (https://www.youtube.com/watch/?v=gUdQAIgxJ5Y)
4. Software - Applications: Clio (legal practice management) Clio Incorporated (888-858-2546) www.goclio.com (http://www.goclio.com).
5. Software - Applications: Sage-Timeslips (time tracking software), Sage Software, Inc., (866-996-7243) http://na.sage.com/us/sage-timeslips (http://na.sage.com/us/sage-timeslips/).
6. Software - Applications: CaseMap & TimeMap (litigation support), LexisNexis, Inc. (888-285-3947). https://www.casesoft.com/casemap/casemap.asp.
7. Software - Applications: SmartDraw (presentation software) SmartDraw, LLC (858-225-3300) www.smartdraw.com (http://www.smartdraw.com).
8. Software - Applications: Sanction (litigation presentation software) , LexisNexis, Inc. (888-285-3947) http://www.lexisnexis.com/en-us/litigation/products/sanction.page.
9. Website - Introduction to Summation 5.0 - https://www.youtube.com/watch?v=xJIm4szJvoI (https://www.youtube.com/watch/?v=xJIm4szJvoI).
10. National Society for Legal Technology - https://legaltechsociety.wildapricot.org

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