

New Filing Procedures

DeLong Grant Law Partners



Referencing Number System

- Include these three parts in the number
 - ✓ Client last name
 - ✓ Date file opened
 - ✓ Date file completed (if applicable)
- Example: DeLong_01-15-2014_10-14-2016



Hardcopy Filing

- Include the reference number on all pages of the legal document
 - ✓ Place the number in the upper right corner
 - ✓ Add the date completed when the case is closed.
- Retain a copy of the document for your personal file



Digital Filing

- Use the reference number for the file name
- Save a copy of the file to the company database
 - ✓ Require authorized employees to use a Login to view the file
 - ✓ Lock the file after any changes are made



Summary

All changes are effective immediately. Direct questions to the support team.

