

# **Lawless & Outlaw, P.A.**

## User Guide for Legal Assistant

Version 1.0

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# UG Introduction

This user guide provides instructions for tasks performed by a Legal Assistant at Lawless & Outlaw, P.A.

The guide is intended to be used on-screen to provide instructions for editing documents. The guide is also useful as a printed document.

Lawless & Outlaw, P.A. (L&O) works primarily in family law such as divorce, parentage and adoption. This guide uses examples specific to domestic matters or family law.

The basics of pleadings, captions and case numbers are useful across all court matters.

## **Paralegal Tasks**

The paralegal tasks covered in this manual include:

- » Opening a new client file.
- » Creating pleadings and understanding the basics of writing a pleading.
- » Preparing a petition for divorce.

## **Things You Need to Know - the How-Tos**

- » How to determine a county code and district name from a county name.
- » How to construct a caption.
- » How to create a signature block.

## **Decoders**

- » Reading and understanding a case number.
- » Reading and understanding a caption.
- » Knowing when to use f/k/a and n/k/a.

Remember, legal assistants and office staff owe the same legal obligation of confidentiality to the client as the attorney.

# Legal Assistant Paralegal Tasks

The paralegal tasks covered in this section include:

- » Setting up a new client file.
- » Understanding the basics of creating pleadings.
- » Preparing a petition for divorce.

## Setting Up a New Client Office File

### A. Setting up a new client's computer file at L&O.

For items 2 - 5 below, use information as marked on Jane Doe Smith's Client Information (JDS's CI) sheet following these instructions. The blank Client Information sheet with marked callouts can be found in the Appendix.

1. Using Windows Explorer, create a new folder using the client's name and year; for example, **Smith, Jane Doe 15** for Jane Doe Smith, a new client in 2015. Save all the files you create via the instructions below into this new folder.
2. Create the **ClientInfo.doc** file by typing in the information marked as Item 2 on JDS's CI sheet and save the file. The **ClientInfo.doc** file contains:

Jane Doe Smith  
123 S. Main Street  
Santa Fe, NM 87500  
  
(505) 333-4545 cell  
(505) 986-9876 home  
(505) 222-3434 work      DocsRUs

[janedoesmith69@gmail.com](mailto:janedoesmith69@gmail.com)

ssn: 123-45-6789  
dob: 02-17-69

Date of Marriage: 06-30-2000      Place: Las Vegas, NM

Children:

Tom Smith    dob: 08-21-02  
Julie Smith    dob: 03-28-10

3. Identify the parties for the caption file using information marked as Item 3 on JDS's CI sheet or from an existing pleading. See "[How to Create a Caption](#)" on page 12 instructions for more information.

If this is a new court case, assign the party alignment with client as Petitioner and opposing party as Respondent. If this client's case is an existing case, copy the caption from an existing pleading.

In this example, using the parties' names, start creating the **Caption.doc** file. Type in the parties' names and alignment as Petitioner and Respondent as shown below and save the file:

JANE DOE SMITH,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

4. Create the **O . P . doc** file for the opposing party's information. Type in the information marked as Item 4 on JDS's CI sheet and save the file. The **O . P . doc** file contains:

John Smith  
PO Box 23401  
Santa Fe, NM 87500

(505) 456-9000

[johnsmith1000@gmail.com](mailto:johnsmith1000@gmail.com)

ssn: 987-65-4321  
dob: 12-22-68

Attorney: Bob Bragsalot

5. If the Client Information sheet has the name of the opposing counsel, marked as Item 5, Attorney, create the **O . C . doc** file. If the attorney is not listed on the Client Information sheet, you can make this file later. When the attorney's name is available, look up the attorney's information on-line or in the Bench and Bar directory. In this case, type in the information marked as Item 5 on JDS's CI sheet and save the file. The **O . C . doc** file contains:

Bob Bragsalot  
Bragsalot Law Firm, P.C.  
1927 20<sup>th</sup> Avenue, SW  
Espanola, NM 87600

(505) 889-2120 office  
(505) 889-2121 fax

[bbragsalotlaw@yahoo.com](mailto:bbragsalotlaw@yahoo.com)

6. Scan the Client Information sheet and save as **L&O - Client Information Sheet - MM-DD-YY .pdf** where MM-DD-YY is the date the client hired the L&O attorney.
7. Scan the Professional Services Agreement (PSA) document and save as **L&O - Professional Services Agreement - MM-DD-YY .pdf** where MM-DD-YY is the date the agreement was signed.
8. Send the client a copy of the L&O PSA either as an email attachment or copy and send in the mail.

9. Stamp the back of the L&O PSA with the document service stamp. Write in the stamped area how and when the document was sent to the client.
10. Log the work in the your activity log.

### Jane Doe Smith's Client Information sheet:

Date: \_\_\_\_\_  
 File No: \_\_\_\_\_  
 Matter: \_\_\_\_\_

*Law Office of  
 Lawless and Outlaw, P.A.*

ITEMS 2 and 3

CLIENT INFORMATION

Name <i>Jane Doe Smith</i>	SSN <i>123-45-6789</i>	DOB <i>2-17-69</i>
Email Address: <i>janedoesmith69@gmail.com</i>		
Phone Cell: <i>505-333-4545</i> Home: <i>505-986-9876</i>	Mailing Address <i>123 S Main Street Santa Fe, NM 87500</i>	Residence Address <i>same</i>
Occupation <i>Nurse Practitioner</i>	Employment Address <i>Docs R Us</i>	Phone <i>505-222-3434</i>

OPPOSING PARTY INFORMATION		
Name <i>John Smith</i>	SSN <i>987-65-4321</i>	DOB <i>12-22-68</i>
Email Address: <i>johnsmith1000@gmail.com</i>		
Mailing Address <i>Po Box 23401 Santa Fe, NM 87500</i>	Phone Cell: <i>505-456-9000</i> Work: Home:	Attorney <i>Bob Bragsalot</i>
Employment Address <i>LANL</i>		Phone Income

ITEM 4

ITEMS 3 and 4

ITEM 5

PLEASE ANSWER THE FOLLOWING QUESTIONS IF APPLICABLE

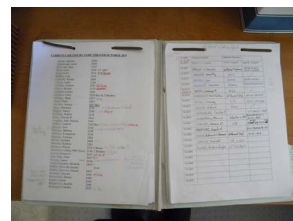
Date of Marriage: <i>6-30-2000</i>	Place of Marriage: <i>Las Vegas, NM</i>
Children: Names and Birth Dates  <i>Tom Smith 8-21-02</i> <i>Julie Smith 3-28-10</i>	
Prior litigation related to this case:  	

ITEM 2

## B. Setting up a new client's paper file

These are the instructions to set up a paper file for a new client.

1. Find the client list folder on the desk in the filing room or in the filing cabinet with the most recent client files. These photos show the client list folder that you are looking for.



2. On the client list, assign the next file number by writing the client's name, case type and case number on the list.
3. Label the tab of a new, or recycled, 2-post folder with the new client's file number. Notice that there is a 2-post clip on each side of the folder.
4. Punch the Client Information sheet and place it on the posts on the left side of the client's folder.
5. Punch the client Professional Services Agreement and place it on the posts on the left side of the client's folder.
6. Punch emails, letters, notes and communications and place on the posts on the left side of the client's folder. These items should be filed in reverse chronological order with most recent on top.
7. Punch pleadings and place on the posts on the right side of the client's folder. Pleadings should be filed in reverse chronological order by endorsed date with most recent on top.

At Lawless & Outlaw, P.A., file numbers are sequential and prefaced by the year. File numbers are not duplicated.

## Pleadings - The Basics

Pleadings, or documents filed in a case, are the only allowed method of communication with the Judge.

All pleadings filed in a case must be provided to the opposing counsel or party. Pleadings are provided to the opposing party directly only if the opposing party is not represented by an attorney.

Pleadings are provided to the Judge by filing them with the court clerk. Filing means that the pleading is provided to the court clerk in person or by fax. The clerk will accept, date stamp, or endorse, the document and enter it into the case record.

A pleading is a document provided to the Judge to:

- » ask for something.
- » respond to something that was asked for.
- » provide notice of information.
- » tell the Judge about an agreement.
- » tell the Judge when someone has satisfied the judgment, instructions or tasks, in an order.

Sections of a pleading are the:

- a. Caption or document heading. The caption needs the correct county name, district name and county code. See the ["Caption Decoder" on page 16](#) to learn how to read a caption or ["How to Create a Caption" on page 12](#) for help writing a caption.
- b. Title or name of the document. The title is the topic, or purpose, for the entire document, for example, "Motion to Modify Child Support."
- c. Body of the document. The body consists of two sections; the story and the desired results. The story is the statement of purpose and facts. The desired results section is the closing or the **WHEREFORE** section. The **WHEREFORE** section is the place you list what you are asking the Judge to do.
- d. Signature block for the attorney. See ["How to Create Signature Blocks" on page 13](#) for help writing a signature block.
- e. Footer caption title or FCT. The FCT is placed in the footer of the document starting on the second page. It includes the names of the parties, the case number and page numbering. See ["How to Create a Caption" on page 12](#) for help writing an FCT.

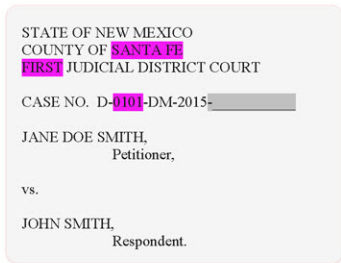
On every pleading, confirm that you have a correct caption and a correct signature block. Make the caption and the signature block and save them in the **Caption.doc** file.

For a new caption, a complete case number is not available because the case has not been filed with the court.

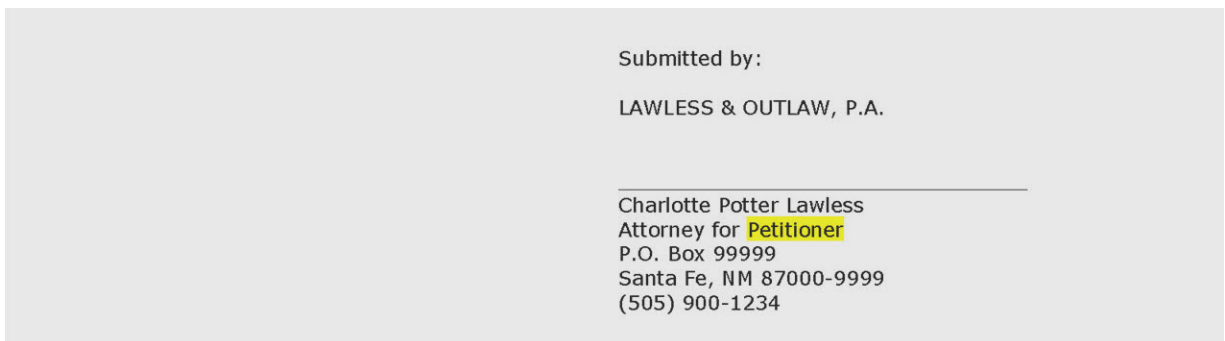
A complete case number would be D-0101-DM-2015-12345.

The incomplete number in the caption for a new, not yet filed, case would be D-0101-DM-2015-\_\_\_\_\_. The underlined blank leaves a space for the court clerk to write the new case id when the case is opened.

See the new case caption example below.



The signature block for a new case lists the L&O attorney as "Attorney for Petitioner" as shown below. The signature block is not right-justified but is offset to the right of center of the page.



See the pleading in the Appendix and ["How to Create Signature Blocks" on page 13](#) for proper formatting of the signature block.



The footer caption title, or FCT, for a new case does not have a complete case number and is formatted like this:

JANE DOE SMITH vs. JOHN SMITH  
PETITION FOR DISSOLUTION OF MARRIAGE

Page 2 of 3

After the case has been filed and assigned a case number, the case number is included in the FCT. See the ["How to Create a Caption" on page 12](#) instructions for more information on creating an FCT.

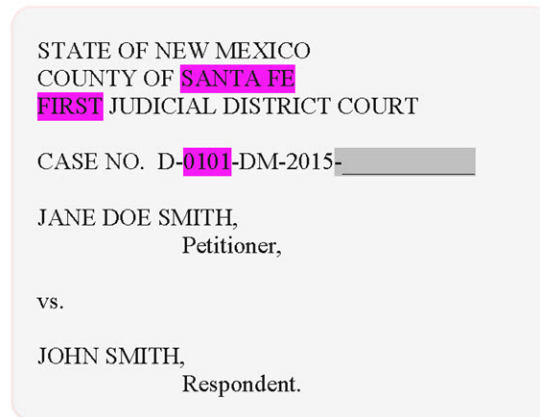
## Preparing a Petition for Dissolution of Marriage

The Petition for Dissolution of Marriage is the base pleading for the petition package. These instructions take you through the petition pointing out each edit that you need to make.

The complete petition document can be found in the Appendix.

### 1. Edits for the Petition body, page 1:

- a. Caption: Using the county name, determine the county code and court district name. Create the caption and save it in the **Caption.doc** file. See ["How to Create a Caption" on page 12](#) if you need help making a caption file.



STATE OF NEW MEXICO  
COUNTY OF SANTA FE  
FIRST JUDICIAL DISTRICT COURT

CASE NO. D-0101-DM-2015- [REDACTED]

JANE DOE SMITH,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

EDIT 1 a

- b. In paragraph 1: Type in the county of jurisdiction. At least one of the parties must have lived in that county continuously for six months prior to filing the petition. This is the same county used in the caption.

### PETITION FOR DISSOLUTION OF MARRIAGE

COMES NOW Petitioner and states:

1. Petitioner has resided in New Mexico for more than six months

immediately preceding the filing of this Petition. Petitioner is a resident of Santa Fe County.

EDIT 1 b

- c. In paragraph 2: Type in the correct date and location of the marriage.

2. Petitioner and Respondent were married in Santa Fe, New Mexico on September 28, 1982. They have been husband and wife since that time.

EDIT 1 c

3. The parties no longer live together as husband and wife.

- d. Paragraph 5: Include this paragraph if there are minor children of the marriage. Remove this paragraph if there are no minor children of the marriage.

reconciliation.

EDIT 1 d

5. The child of the parties has reached maturity and no other children are expected.

6. Petitioner and Respondent have accumulated community property during

2. Edits for the Petition body, the story, page 2:

- a. In paragraph 8: Regarding the highlighted phrase "or for the benefit of the parties' children," remove the phrase if there are no minor children of the marriage. Leave the phrase if there is a minor child of the marriage. Change the word "children" to "child" if there is only one minor child of the marriage.
b. Paragraph 9: Remove the paragraph if the marriage is of short duration and the parties are not entitled to spousal support, or alimony.

7. Petitioner and Respondent have incurred community debt during their marriage which debt should be divided and allocated for payment.

EDIT 2 a

8. Petitioner or Respondent may have debt made after the separation and not made for the benefit of the community or for the benefit of the parties' children which debt should be awarded for payment to the party incurring the debt.

EDIT 2 b

9. Petitioner is entitled to an award of spousal support.

10. Petitioner has incurred attorney fees.

3. Edits for the Petition body, Wherefore, page 2:

- a. Paragraph 3:
i. Remove if there are no minor children of the marriage.
ii. Modify the alignment of the parties appropriately for the request depending on which party wants primary physical custody of the child(ren).
iii. Modify the statement if the parties share physical custody, such as a week on/off at each parent's home.

and affirm each parties' separate property and separate debt.

EDIT 3 a

3. Grant the parties joint legal custody with Petitioner having primary physical custody and Respondent having reasonable visitation rights.

- b. Paragraph 4: Include this paragraph if there are minor children of the marriage. Remove this paragraph if there are no minor children of the marriage.

4. Award child support based on the child support guidelines.

EDIT 3 b

5. Award Petitioner alimony.

- c. Paragraph 5: Remove this paragraph if the marriage is of short duration and the parties are not entitled to spousal support, or alimony.

5. Award Petitioner alimony.

EDIT 3 c

6. Award such other and further relief as the Court may deem just and

**4. Edits for Signature Block, page 2:**

Confirm that the signature block states "Attorney for Petitioner", not "Attorney for Respondent."

See "[Pleadings - The Basics](#)" on [page 5](#) for more information on this signature block.

**5. Edits for FCT, pages 2 and on:**

Confirm that the footer caption title (FCT) has the correct party names and pleading title.

See "[Pleadings - The Basics](#)" on [page 5](#) for more information on this FCT.

**6. Edits for Verification, page 3:**

The verification section below is required on pleadings that require a party's signature. The petition requires Petitioner's signature and this verification section.

- a. Check that the county is the same county used in the caption.
- b. Confirm that the name for verification and verification signature is Petitioner's name.
- c. Check that the correct year is on the verification signature.



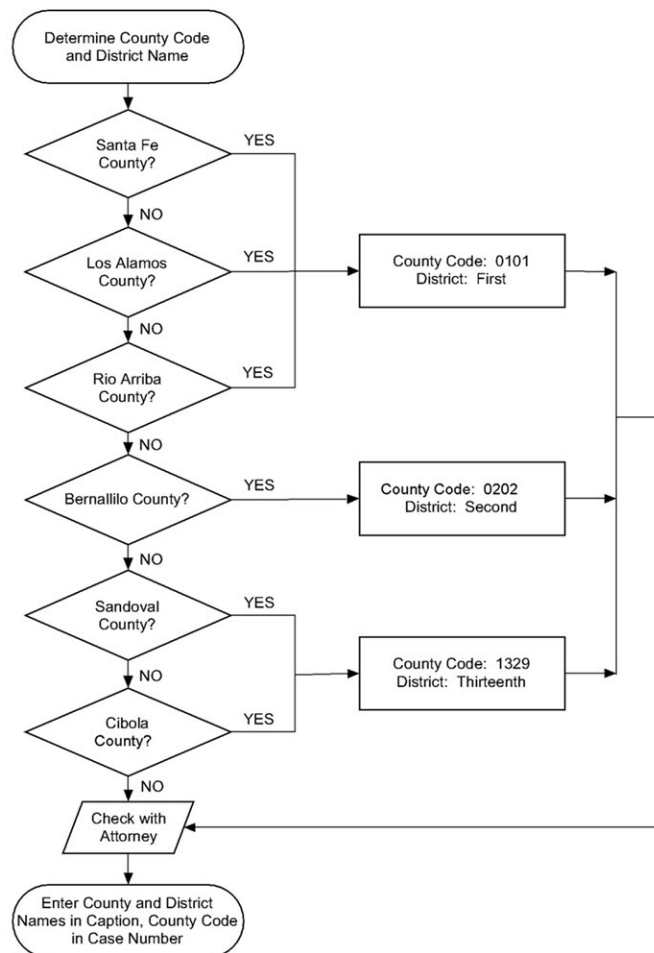
# Things You Need to Know -- the How-Tos

This section includes information that you need to understand to create and edit pleadings.

- » How to determine the county code and court district from a county name.
- » How to construct a caption.
- » How to create a signature block.

## How to Determine County Code and District Name for Captions and Case Numbers

The decision tree below assumes that you know the county name and need to know the county code and court district name.



To use the decision tree, start at the top and look for the county name, the county where the case is to be filed.

Drop down the diagram until you find the county name, then follow the YES path to the right to get the county code and district name.

When you have the county code and district name, you may drop through to check with the attorney and then use them in the caption file.

If you do not find the county name of interest on this diagram, check with the attorney. The attorney can help you find on-line the county code and district name that you need to use in the caption file.

## How to Create a Caption

A caption is the header for every pleading in a case. For more information about the components of a caption, see the ["Caption Decoder" on page 16](#).

If this client's case is an existing case, copy the caption from an existing pleading to create the **Caption.doc** file.

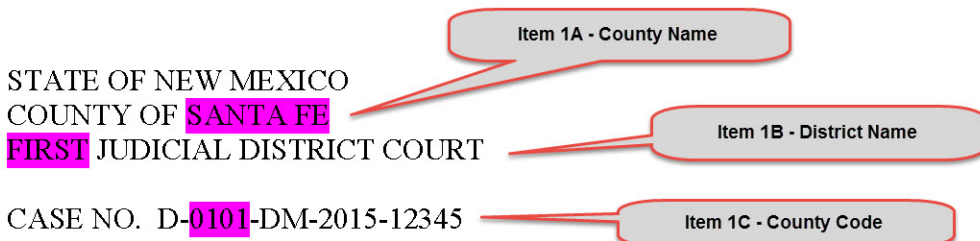
If this client's case is a new case, create the **Caption.doc** file using the information below.

To create a new caption, you need:

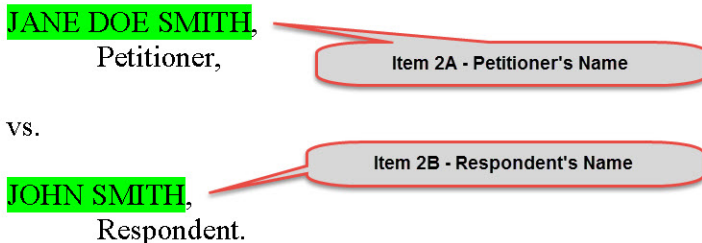
- » the county where the case is to be filed.
- » the names of the parties and which party is filing the petition. For a new case, the L&O client is filing the petition. Find the names of the parties on the Client Information sheet.

The county code and court district name are needed for the caption. Determine the county code and court district name from the county name by following the instructions in ["How to Determine County Code and District Name for Captions and Case Numbers" on the previous page](#).

Start creating the caption file by typing in the following using the appropriate data in items 1A, 1B, and 1C as shown below:



Finish the caption by typing in the parties' names in items 2A and 2B as shown below:



For a new caption, a complete case number is not available because the case has not been filed with the court.

A complete case number would be D-0101-DM-2015-12345.

The incomplete number in the caption for a new, not yet filed, case would be D-0101-DM-2015-\_\_\_\_\_. The underlined blank leaves a space for the court clerk to write the new case id when the case is opened.

### **The Footer Caption Title or FCT:**

Use the FCT or Footer Caption Title on all multi-page documents. The FCT is the page footer on the document and contains the caption names and case number, the title of the document and the page x of y designation.

To make an FCT, combine the caption names onto one line. On the next line, type in the case number if the case has been filed. When you place the FCT into the document, on the right side of the first line, place the page x of y designation. Finally, add the pleading's title as the third line of the FCT.

The footer caption title, or FCT, for a new case does not have a complete case number and is formatted like this:

JANE DOE SMITH vs. JOHN SMITH  
PETITION FOR DISSOLUTION OF MARRIAGE

Page 2 of 3

After the case has been filed and assigned a case number, the case number is included in the FCT. A complete FCT for a "Motion to Modify Child Support" pleading is formatted like this:

JANE DOE SMITH vs. JOHN SMITH  
D-0101-DM-2015-12345  
MOTION TO MODIFY CHILD SUPPORT

Page 2 of 3

### **The Caption.doc file:**

The **Caption.doc** file is a good place to store several important and often-used pieces of information. Use this file to store:

- » the caption.
- » the footer caption lines (names and case number).
- » the name of the Judge assigned to the case.
- » the standard signature blocks for the attorney and for the Judge.
- » any other re-useable information.

## **How to Create Signature Blocks**

There are several signature block styles, use is dependent on the type of pleading. Make sure that the signature block correctly identifies the client's relationship to the case as Petitioner or Respondent.

A signature block provides the information for the signatory and a place for the signature. The signature block includes:

- » name of the attorney's firm
- » a line for the attorney's signature
- » attorney's name
- » attorney's relationship to the client
- » attorney's address
- » attorney's office phone number

For a Motion, Response to Motion or Reply to Response to Motion, the signature block is placed right of center of the page. See below:

Submitted by:  
LAWLESS & OUTLAW, P.A.

---

Charlotte Potter Lawless  
Attorney for **Petitioner**  
P.O. Box 99999  
Santa Fe, NM 87000-9999  
(505) 900-1234

For an Order, the signature block is left justified. See below:

Submitted by:  
LAWLESS & OUTLAW, P.A.

---

Charlotte Potter Lawless  
Attorney for **Petitioner**  
P.O. Box 99999  
Santa Fe, NM 87000-9999  
(505) 900-1234

The signature block for the Judge, which is required on Orders, is placed right of center of the page. Make sure you have the correct Judge's name. See below:

**SYLVIA BESTJUDGE**, District Court Judge



# Decoders

Decoders provide detailed explanations about specific items used in pleadings.

Decoders included in this section cover:

- » case numbers
- » captions
- » f/k/a and n/k/a clauses

## Case Number Decoder

Each case number is unique to the court type, county code, and case type where the case is opened and filed, for example:

D-0101-DM-2015-12345

A case number has five sections as shown in the table below.

<b>D-0101-DM-2015-12345</b>		
D	Court Type	D = District Court M = Magistrate Court
0101	County Code	See " <a href="#">How to Determine County Code and District Name for Captions and Case Numbers</a> " on page 11 for help to determine a county code.
DM	Case Type	DM = Domestic CV = Civil DV = Domestic Violence SA = Adoption (Sequestered)
2015	Year	Year the case was originally filed or opened.
12345	Court case number	Sequentially assigned by the court. This number is always five (5) digits. Pad the beginning of the number with zeros as needed to make five (5) digits. For example for 59, use 00059 and for 201, use 00201.

## Caption Decoder

The caption is the header on every pleading, or document, filed with the court. It provides the reference information for any reader; a court clerk, a Judge, an attorney, to know which case with which to associate the document. The caption is always the same for any pleading on a case.

In New Mexico, a no-fault divorce state, it does not matter who is listed as Petitioner or Respondent. The parties' alignment does not carry any weight with the court. The only general meaning of the alignment is an indication of who filed the divorce case, the Petitioner. Petitioner remains Petitioner in the caption even for pleadings filed by Respondent.

You can think of the caption as the pleading's address. The caption tells the reader which case the document belongs to, or where the pleading lives.

The caption is written in reverse order to an address; the town, the street address and then the people.

STATE OF NEW MEXICO  
COUNTY OF SANTA FE  
FIRST JUDICIAL DISTRICT COURT

CASE NO. D-0101-DM-2015-12345

JANE DOE SMITH,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

### Components of the Caption are:

- A. The county and the court district [ie the town]

STATE OF NEW MEXICO  
COUNTY OF SANTA FE  
FIRST JUDICIAL DISTRICT COURT

- B. The case number [ie the street address]

CASE NO. D-0101-DM-2015-12345

- C. The people [ie the addressees]

JANE DOE SMITH,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

Refer to ["How to Create a Caption" on page 12](#) for help creating a caption.

## F/K/A and N/K/A Decoder

The f/k/a and n/k/a clauses are occasionally used in a caption. The f/k/a and n/k/a phrases can be used for either or both Petitioner or Respondent.

f/k/a is "formerly known as"

n/k/a is "now known as"

Using our sample caption with Jane Doe Smith as Petitioner, the standard is:

JANE DOE SMITH,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

When Jane changes her name back to Jane Doe and the case continues, the caption may change. The change in the caption could use either f/k/a or n/k/a.

When f/k/a is used in the caption, it becomes:

JANE DOE f/k/a JANE DOE SMITH,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

When n/k/a is used in the caption, it becomes:

JANE DOE SMITH, n/k/a JANE DOE,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

# Appendix of Pleadings

This Appendix contains the complete pleading and other documents referred to in this guide.

Documents included are:

- » Petition for Dissolution of Marriage
- » Client Information Sheet

STATE OF NEW MEXICO  
COUNTY OF SANTA FE  
FIRST JUDICIAL DISTRICT COURT

CASE NO. D-0101-DM-2015-\_\_\_\_\_

JANE DOE SMITH,  
Petitioner,

vs.

JOHN SMITH,  
Respondent.

**PETITION FOR DISSOLUTION OF MARRIAGE**

**COMES NOW** Petitioner and states:

1. Petitioner has resided in New Mexico for more than six months immediately preceding the filing of this Petition. Petitioner is a resident of Santa Fe County.
2. Petitioner and Respondent were married in Santa Fe, New Mexico on September 28, 1982. They have been husband and wife since that time.
3. The parties no longer live together as husband and wife.
4. There is a discord or conflict of personalities such that the legitimate ends of the marriage relationship is destroyed preventing any reasonable expectation of reconciliation.
5. The child of the parties has reached maturity and no other children are expected.
6. Petitioner and Respondent have accumulated community property during the marriage which property should be valued and divided.

7. Petitioner and Respondent have incurred community debt during their marriage which debt should be divided and allocated for payment.

8. Petitioner or Respondent may have debt made after the separation and not made for the benefit of the community or for the benefit of the parties' children which debt should be awarded for payment to the party incurring the debt.

9. Petitioner is entitled to an award of spousal support.

10. Petitioner has incurred attorney fees.

WHEREFORE Petitioner prays that the Court:

1. Grant the parties dissolution of marriage on the ground of incompatibility.

2. Equally distribute the parties' community property and community debt and affirm each parties' separate property and separate debt.

3. Grant the parties joint legal custody with Petitioner having primary physical custody and Respondent having reasonable visitation rights.

4. Award child support based on the child support guidelines.

5. Award Petitioner alimony.

6. Award such other and further relief as the Court may deem just and proper.

Respectfully submitted by:

LAWLESS & OUTLAW, P.A.

---

Charlotte Potter Lawless  
Attorney for **Petitioner**  
P.O. Box 99999  
Santa Fe, NM 87000-9999  
(505) 900-1234



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

File No: \_\_\_\_\_

Matter: \_\_\_\_\_

Law Office of  
Lawless and Outlaw, P.A.

ITEMS 2 and 3

**CLIENT INFORMATION**

Name	SSN	DOB
<u>Email Address:</u>		
Phone Cell: Home:	Mailing Address	Residence Address
Occupation	Employment Address	Phone

**OPPOSING PARTY INFORMATION**

Name	SSN	DOB
<u>Email Address:</u>		
Mailing Address	Phone Cell: Work: Home:	Attorney
Employment Address		Phone
		Income

ITEMS 3 and 4

ITEM 5

**PLEASE ANSWER THE FOLLOWING QUESTIONS IF APPLICABLE**

Date of Marriage:	Place of Marriage:
Children: Names and Birth Dates	
Prior litigation related to this case:	

ITEM 2



# Glossary

## A

---

### **Activity Log**

An MS Word file where the Legal Assistant records daily activities by date, client, task performed and time spent on that task.

### **Alignment of parties**

Assignment of each party, or person, as Petitioner or Respondent in the case. Petitioner is the person who filed the case. Respondent is the opposing person.

## C

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### **Caption**

A pleading's address.

### **Case Number**

The unique identifier for a court case.

### **Client File Number**

The unique identifier for a client's file at L&O.

### **Client Information Sheet**

Form used by L&O to collect the client's information for use in L&O records and in pleadings.

### **Client List Folder**

The folder containing the list of clients and their office file numbers. Do NOT loose this folder!

### **ClientInfo.doc**

Word file that contains the client's information ; name, address, phone, email, dob, ssn, date of marriage, and children from the client information sheet.

## D

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### **Decoder**

Detailed explanation of specific, often re-used, content items. Like a magic decoder ring.

## **E**

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### **Endorsed date**

The date the pleading was filed by the court clerk, or fax-filed by L&O.

## **F**

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### **f/k/a**

Formerly known as.

### **FCT**

Footer Caption Title section of a pleading.

### **Filing a pleading**

Filing a document with the court clerk.

## **L**

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### **L&O**

Abbreviation for Lawless & Outlaw, P.A.

## **M**

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### **Minor child**

A child younger than 18 years old.

## **N**

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### **n/k/a**

Now known as.

### **New case**

In this manual, a new case is one for which L&O files the first pleading, the petition for divorce, for parentage or for adoption.

## **O**

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### **O.C.doc**

File containing the opposing counsel's information: name, address, phone, fax, email.

**O.P.doc**

File containing opposing party's information; name, address, phone, email, dob, ssn and attorney.

**Opposing Counsel**

The attorney for the opposing party.

**Opposing Party**

The other person in the case. May be either the Petitioner or Respondent, depending on who is the firm's client.

**P**

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**Petitioner**

Person, or party, who originally filed the case. In the case caption, Petitioner remains Petitioner even if the pleading is filed by the Respondent.

**Pleading**

Document properly formatted and filed with the court.

**PSA**

Professional Services Agreement or contract.

**Punch**

Either 2-hole or 3-hole punch the document appropriately for the 2-prong folder or a 3-ring notebook.

**R**

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**Respondent**

Other person, or party, in the case. Respondent remains Respondent even if the pleading is filed by the Respondent.

**S**

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**Scan**

Feed the document through the ScanSnap scanner and save the document to the client's file folder with a descriptive name and date of the document.

**Signature Block**

Formatted block of text for the attorney's or Judge's signature.

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