Practice Management Update



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1. Spring Forward

This year, Daylight Savings Time takes effect on Sunday, March 11. Because this is the first year of the new schedule, your computer may require some additional assistance with making the adjustment. In most cases, if you have automatic updates enabled, you should have already received an update which will correct the date on which the clock changes. If you haven't enabled your auto updates and are running on Windows, check the <u>Microsoft website</u> for your update. You may also need to update your calendar program. Check your appointments for the period March 11 to April 1, 2007 and look for appointments that are out by one hour. If they are wrong, check the software manufacturer's website for a patch. Click here for the <u>support page for Outlook</u> (you'll need to know which version you're using.) On a Palm PDA, only PDA's using Palm OS 5.0 and later provide a DST option. You'll need to reset the change date yourself following the instructions on the <u>Palm website</u>.

2. Another Reason to Reconcile

Law Society <u>Rule 5-42(2)</u> requires law firm trust accounts to be reconciled monthly, by the end of the following month. This procedure is more than just a Law Society requirement. It is also an important internal control that will alert you to fraudulent withdrawals from your bank account. Cheque fraud is a growing problem and one of the more commonly used schemes is the use of counterfeit cheques which can be produced to look exactly like the account holder's cheque stock (see <u>Cheque Fraud Hits Hamilton Firm</u>). Preparing your monthly trust reconciliation on time will help you to detect these problems before they escalate.

3. New Membership Forms Available for Use April 1st

Just a reminder that you have to keep the Law Society informed about changes in your contact information. Effective April 1, 2007 the forms to change your practising status or contact information will be available on <u>our website</u> in a new section called "Member Services". (We can also mail or fax forms to members on request.) These forms should be completed by members who are changing their practising situation or contact information and by those applying to commence or resume active practise or withdraw from practise.

These forms are intended to help you meet all the requirements set out in the Law Society Rules. For example, all members intending to withdraw from practise must provide the Society with a written undertaking that they will not practise law in Manitoba. The rules also require sole practitioners to obtain the Society's **prior approval** for their intended plan of withdrawal. In particular, the Society needs to know how the practitioner proposes to dispose of his or her open and closed files, wills, titles, and other important valuables, documents and records and when the member expects to be able to disburse all trust money and close his or her trust account.

Members with any questions should contact the Law Society's Office Manager, James Ramsay at 926-2018 or <u>jramsay@lawsociety.mb.ca</u>, or Deputy Chief Executive Officer, Marilyn Billinkoff at 926-2010 or <u>mbillinkoff@lawsociety.mb.ca</u>.

4. Paperless Law?

While converting entirely to a paperless office may not be practical for all law firms, making the move to an office with less paper is something you should consider. Take some time to read <u>*Client Files Makeover: The Move from Paper to Electronic Files*</u> for a clear, concise introduction to the process of reducing the paper in your office. Carole Curtis, an Ontario family law practitioner, has gone paperless and describes her experience in <u>*The paperless office: resistance is futile*</u> (Law Times, May 29, 2006).

5. Current Practice Management Resources

The Winter 2007 issue of <u>LAWPRO Magazine</u>, available entirely online, includes a number of practice and office management articles of interest. Take a look at:

- Winding down the law practice, by Stephen P. Gallagher
- <u>Retirement as a renewal process</u>, by Stephen P. Gallagher
- Tech Tip: How to do more with your mouse, by Dan Pinnington
- Personal information and privacy: Where are the boundaries? by Simon Chester
- <u>Planning for career adjustments</u>

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