



eLaw - Practice Management Update

February 2011 - No. 36

ISSN 1916-3940

In This Issue

Annual Trust Account Report Deadlines

Model Policy on Social Networking Use

Slaw II: Succinct Advice on Technology, Research and Practice

Legal Research Shortcuts

Playing it Safe at Closing Time

Recommended Reading

Upcoming Continuing Professional Development Programs: LSM

Canadian Bar Association Online Programs

Annual Trust Account Report Deadlines

Law firms with a December trust year end should have received their Annual Trust Account Report package from the Law Society in early January. Members who elect to file a Self Report must file it on or before February 25, 2011. For those members who are required (or elect) to file a Form D with Accountant's Review, the deadline is April 29, 2011.

Model Policy on Social Networking Use

Concerned about how employee social networking may be affecting your firm's reputation? The Law Society of British Columbia has developed a [model policy](#) for firms seeking to control the use of social networks by employees. It can be used as a starting point for discussing the issue or developing guidelines to manage content, respect confidentiality and avoid conflicts.

Slaw II: Succinct Advice on Technology, Research and Practice

The new [Slaw](#) sister site, [Slaw Tips](#), dispenses practical advice on a distinct topic each Tuesday ([technology](#)), Wednesday ([research](#)) and Thursday ([practice](#)). You can subscribe by [email](#) or [RSS feed](#) or view the posts on the website or on Twitter.

Legal Research Shortcuts

If you need to find quality legal information on a particular topic or keep up with the latest developments in an area of the law follow the suggestions in two recent articles on the above-mentioned Slaw Tips site:

- [CLE Papers as a Research Source](#) provides tips and links for finding current conference papers by legal experts. One of the links is to Ted Tjaden's [website](#) and the [custom search engine](#) he created which does topic searches on Canadian law firm websites (79), blogs (205) and law journals (20).
- [Monitoring a Case Law Subject With CanLII](#) tells you how to use CanLII to keep abreast of new cases on your topic of interest. As noted on [CanLII](#), this method works well, but they are developing an RSS monitoring tool which is expected to be launched in the spring and will provide similar case alerts.

Playing it Safe at Closing Time

The Law Society of Upper Canada has published a [Guide to Retention and Destruction of Closed Client Files](#) which, while based on Ontario law, provides useful information on how to control the volume and type of records retained, and both manage the risk and meet professional responsibilities when destroying files. Appended to the guide are a sample retention policy, retainer agreement provisions and client letter, and a checklist for closing and destroying files.

The [December 2010 issue of LawPRO](#) magazine contains two articles on this topic; the first examines how long files should be kept and the second explains why firms should have a data retention policy. The issue also features articles on title insurance, IFRS, and professional indemnity insurance.

Recommended Reading

The [Canadian Bar Association](#) has added four new articles to [PracticeLink](#) dealing with the following topics: [negotiation skills](#), [forensic accounting](#), [knowledge management](#) and [law firm associates](#).

The [Solo and Small Firm Special Issue](#) of Law Practice magazine contains some great practice management advice for small and large firms alike. From modern marketing to structuring a virtual practice this issue covers a broad range of topics on running a successful law business. The article [Using Technology to Improve Client Service: From the Simple to the Sublime](#) is particularly recommended for its practical advice on using technology to enhance client relations.

If your New Year's resolutions included setting aside time to take a closer look at all the interesting websites you bookmarked and forgot about last year, the article [Sites for Sore Eyes: Websites for the New Year](#) will give you new resolve. It contains a short list of sites recommended by practice management experts.

[Insurance Issues](#), a newsletter published by the Lawyers Insurance Fund of B.C., often contains useful advice on risk management topics. Recent articles include [Income tax: it's a risky business](#) and [Managing the risk of a limited retainer](#).

Upcoming Continuing Professional Development Programs: LSM

Register soon for these upcoming CPD programs offered by the Law Society:

- [Accommodation in the Workplace](#) - Presenters will examine such current issues as family/marital status, gender identity and disability in this dynamic area of law. The program will take place May 17, 2011, from 1:00 to 4:00 p.m. at the Law Society classroom.
- [Time Mastery for Support Staff](#) and [Time Mastery for Lawyers](#) - Don't miss this opportunity to learn how to increase the organization and efficiency of your office and improve the job satisfaction of you and your employees. Frank Sanitate has taught this popular program since 1977 and receives enthusiastic reviews. Register by March 31, 2011 to take advantage of the early bird discount.

Canadian Bar Association Online Programs

- [Effective Document Management for the Small Firm](#) - Presenters will canvass both commercial and do-it-yourself document management systems and provide strategies for implementing effective systems in this online program scheduled from 11:00 a.m. to 12:30 p.m. on February 15, 2011.
- [Safeguarding your Client's Confidential Information - Tips and Traps](#) - Meeting the ethical obligation to keep client information confidential can be a challenge in our digital world. This program will identify the risks and suggest strategies to employ to safeguard client information stored on computers, mobile devices and even photocopiers. It takes place on February 23, 2011 from 11:00 a.m. to 12:30 p.m.

The Law Society of Manitoba provides this service solely for the benefit of and to support the competence of its members. Members should exercise their professional judgment in using or adapting any content.