In paralegal classes, you learned black letter law. You learned legal research. You learned about jurisdiction, torts, and crimes. You learned to use litigation support software and how to file documents using ECF. But did you learn how to find your way around your law office, your local courthouse, and the legal community? If you work in a large law firm, there may be a law office manual ready for you on your first day. If not, start your own, and start it on Day 1 of your employment.

In 1988, I attended my first (of many) NALS Legal Training Courses and I remember being told those words by a seasoned NALS member: “Start off your first day organized and stay that way. Take notes and keep those notes in your notebook. Every time you prepare a new kind of document, make a copy and put it in your notebook. Every time you receive a new, useful piece of information, add it. Never reinvent the wheel if you can avoid it.”

I was reminded again of that information several years ago when I was fortunate to have one of my dear NALS friends join our team as an administrative assistant. While this was a wonderful experience on so many levels, one of the greatest things she shared with me was her “Golden Bucket.” “Golden Bucket,” I said, “What is that?” It turned out to be a simple Word file of all kinds of useful information, both business and personal. She even had MY kids’ birthdays and telephone numbers in it! Where the office manual ended, her personal database began. The principle was the same: what you need, right at your fingertips.

If you have to prepare your own office manual, using a three-ring binder works well because it allows you to add pages as needed. (You can also include blank pages for all that personal data you want to add for yourself but not necessarily share with everyone in the office.) Or you may choose to do the entire manual electronically in a simple Word document, which would allow for easy searching. Whatever medium you choose, just make sure that you have all the information you need on a day-to-day basis at your fingertips and make sure it is easy to update. Do not forget to back it up on a regular basis so you never risk losing all of that valuable information.

I asked AALS members for input about the things that should go in an office manual. They came up with quite an extensive list. Some of it may not be applicable to your firm depending on how your firm is structured. Review it carefully, choose the pieces that fit you and your firm, and add items as necessary.

The first page should have the name of the firm with address (large office); what amenities are available for the employee, i.e., coffee, water, soft drinks; and general structural information about the firm management, such as the managing director’s name, the board of directors, members, and practice group chairs.

Other items the manual should include are:

- Map of the office.
- Who’s Who (CEO, Accounting Manager, Personnel Director, Payroll Specialist, etc., as well as on what floor they are located and their telephone extensions).
- List of telephone extensions for all employees of the office.
- Telephone tips, such as how to transfer a call, transfer a call into voicemail, set up a voicemail message, etc. (or where to
find that information).

- Messenger deadlines (what time filings are taken to various courthouses, Secretary of State, or other locations); when the mail is picked up and delivered; and the pickup time for FedEx and UPS.
- General standards for typewritten work (spaces for paragraph indentation, double spacing or single spacing for letters and pleadings, headings and closings on letters and pleadings, font size, electronic filing procedures, filing passwords for attorneys, procedures for sending, saving, and deleting electronic communications), including samples of various formats will be very helpful also.
- Proofreader's marks.
- Bookkeeping procedures, including: how to enter attorney and paralegal time into the accounting system and the firm's rules about what and how time can be entered; how to request expense reimbursements for attorneys and paralegals and the rules regarding authorized expenses for approved business development activities; and the firm's tax identification number and state and date of incorporation.
- Firm policies for taking new cases.
- Procedures for handling possible conflicts of interest.
- Personnel policies and benefits such as paid parking, health insurance, life insurance, long-term disability, 401K plan, paid leave, worker's compensation, etc.
- Emergency procedures in case of fire, etc. and after-hours contact information.
- Office hours and rules regarding lunch time and coffee breaks.
- Overtime work and compensation.
- Absence from work.
- Vacation policy.
- Holidays (observation of certain days), along with employee's birthday.
- Voting, i.e., all personnel are encouraged to vote and are permitted to take the necessary time off to do so.
- Sick leave.
- Salary increases.
- Conferences (discussion with attorney of any current office problems that should arise).
- Confidential nature of work (format of confidentiality provision to be included in emails going outside of the firm).
- Office security (during business hours and after hours).
- Housekeeping.
- Duplicating (system for passing costs along to clients, if any).
- Postage.
- Telephone calls.
- Reception of clients.
- Appointments.
- Outside employment.
- Smoking rules.
- Conference room(s).
- Filing system.
- Secretarial department. In this section, you might specifically state that the person answering the phone, or answering a page from his or her attorney should have pen and pad in hand to write down the necessary information—do not rely on memory.
- Protocol for handling notice of hearings, depositions, interrogatories and request for admissions, pre-trial conferences, trial settings, etc.
- Handling work for absent attorneys.
- Legal forms.
- Employee at will.
- List of names and telephone numbers of who to call for filing questions (court clerks' offices, NALS pals—networking with all areas of your state and throughout the United States, building security, computer questions—firm IT Department).
- Illness or delay in getting to work.
- Location of supplies.
- Internet/email use policy.
- List of helpful websites with logins, if necessary.
- Availability of notary and notarization forms (if you are a notary).
- Firm's policy regarding allowing clients to have access to their files or copies from their files.

The list could be endless and as time goes on and technology changes, different types of items may need to be added. (For instance, 15 years ago a list of helpful website and logins would not have made the cut. As a seasoned member myself, I can remember when there was no need for fax numbers, much less websites!) Just remember, it is your Golden Bucket; make it work for you!

Cathy Underwood, J.D., is the lead paralegal instructor at Pulaski Technical College in North Little Rock, Arkansas. She started her legal career as a legal secretary. During the time that she was a legal secretary and then a paralegal, she won the NALS Award of Excellence and served in numerous capacities as a member and officer of AALS—the Association for Arkansas Legal Support Professionals and Greater Little Rock Legal Support Professionals. She was instrumental in organizing and teaching at the first NALS PLS Educational Institute that was offered in Arkansas. In 1996, Cathy received the Liberty Bell Award from the Pulaski County Bar Association for outstanding contributions to the legal profession by a nonlawyer, and in June 2010, she received the Golden Gavel Award from the Arkansas Bar Association for outstanding service as a committee chair. While at Pulaski Technical College (PTC), Cathy has been instrumental in developing the first real-time, online courses that PTC offers its students. Cathy is chair of the Online Legal Research Committee for the Arkansas Bar Association, and is a member of the IT Infrastructure Committee, Long Range Planning Committee, and Editorial Board for Handbooks. She is also a certified TrialDirector® instructor. She works tirelessly to promote and improve the legal community's position in Arkansas and acts as a liaison between the Arkansas Bar Association, Arkansas attorneys, paralegals, legal assistants, and the various professional organizations that represent them.

1 With a little help from her friends. The author would like to thank the members of AALS—the Association for Arkansas Legal Support Professionals for their assistance in preparation of this article and for their enduring friendship for the last 23 years.
2 NALS members never grow old; they just become more well-seasoned. This particular seasoned member was the late Bobbie Jones, PLS, a former NALS Legal Secretary of the Year recipient.
3 Another “seasoned” member, with three decades of legal experience under her belt, Janice Miller, CPS, PLS, PP, is also a former NALS Award of Excellence recipient.