



Practice Resource

Using Microsoft Outlook to manage limitation (and other important) dates

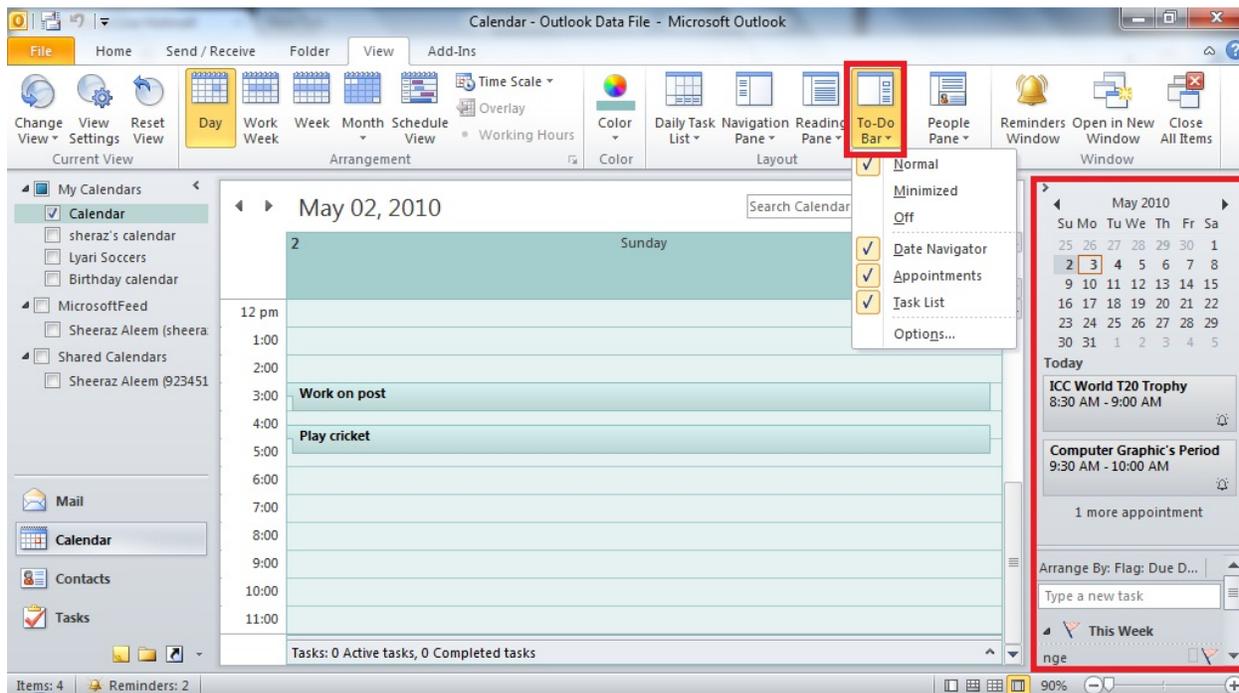
Of all the tasks that must be done in a law office, few of them have such far-reaching professional implications as managing limitation dates. Missing a limitation date can result in significant personal and professional embarrassment, loss of trust with the client, possible negligence liability, having to report to the Lawyers Insurance Fund and, not the least of all, loss of face.

Despite all the consequences of missing a limitation date, it is still a regular occurrence in law firms.

Managing limitation dates along with reminders of other important dates is a task that can be systematized. While organizing paper calendars and/ or index cards by month, date and year was traditionally the way of keeping up with limitation dates, these days computer calendars offer a distinct advantage over paper-based systems. One of the biggest advantages is that electronic calendars can “push” reminders out to lawyers and staff, while paper calendars must be examined. Since many electronic calendars are synchronized with smart phones, lawyers can obtain reminders of limitation and other important dates whether or not you are in the office.

There are two main ways you can use Outlook for limitation and other reminder dates. One is to make appointments in your Outlook calendar that act as reminders; the other is to use the To-Do Bar and Tasks combined with Flags and Categories. We are going to explore both ways, as there is no “one-size-fits-all” approach to running a law office and keeping on top of deadlines and tasks. Outlook’s vast capability for managing appointments, tasks and upcoming deadlines of all types makes it a powerful tool. Once you start to explore the program, you will realize that there are many different ways to harness the power of Outlook.

The To-Do Bar



The To-Do Bar is the panel on the right side of Outlook 2010. It shows you a small calendar, your upcoming appointments and your unified task list, which contains:

- messages you need to respond to (flagged messages);
- contacts you need to call (flagged contacts);
- tasks that come up spontaneously (this is where limitation dates and other reminders will pop up).

When setting up the To-Do Bar, Microsoft suggests that you show:

- a Date Navigator (turned on by default);
- only three appointments, if you have a small screen resolution or you don't have many meetings on a given day (default);
- five or more appointments if you have a large screen resolution or you have many meetings every day;
- tasks (turned on by default);

- Quick Contacts (available and turned on by default in Microsoft Office Communicator 2007 R2).

The default arrangement for tasks is by due date, but you might consider changing the arrangement to start date, depending upon how you use flags (we will explore how to use flags a bit later) and categories. If you want to see the tasks for, say, the following week on Monday, then arrange by start date. If you want to see tasks on the day that they are due, arrange by due date.

Flags

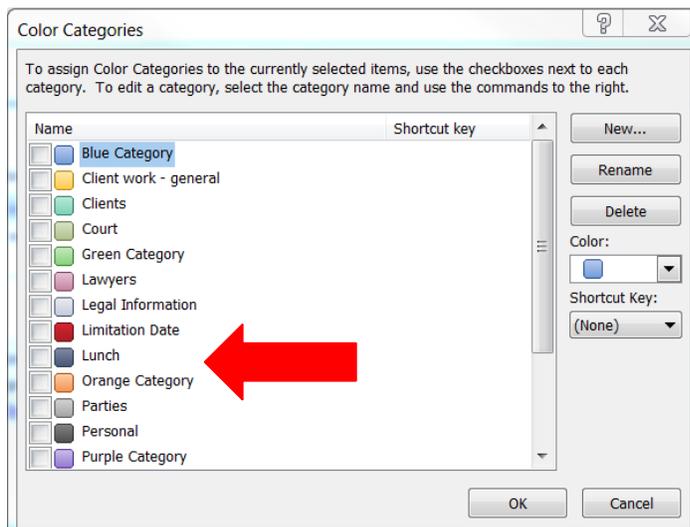
Applying a flag to a message or a contact in Microsoft Outlook gives you a visual reminder to follow up on it in some way. You can use flags with default dates, such as Today, Tomorrow, and Next Week, or customize your flags with specific dates.

Microsoft suggests setting your quick click flag to Today (which is the default). This will show you the items and tasks that are due today. If you look at tasks for any other day, remember that you will have to go back and reset your default flag to today.

Flags for messages appear in your email views. With a Quick Click flag, you can also assign flags to items with a single click.

A flagged item also appears in the To-Do Bar, the Daily Task List in Calendar, and in the Tasks view.

Categories

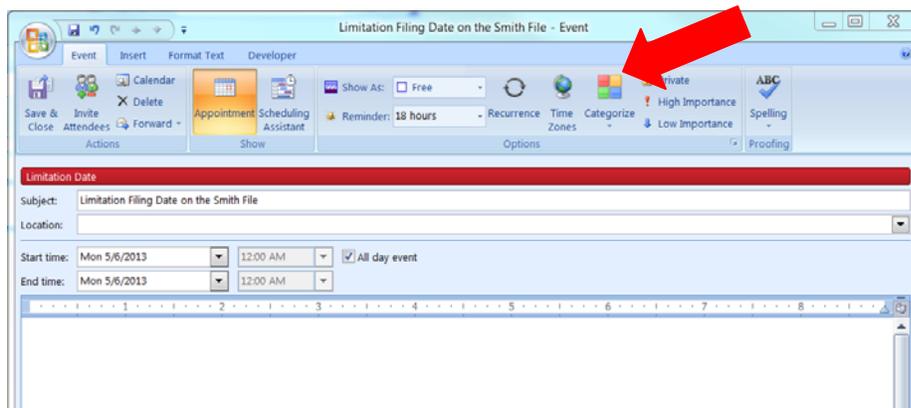


Outlook allows you to create categories, which is a way to group similar tasks (such as limitation reminders, for example).

Among many other functions, categories can draw extra attention to limitation date reminders that are tasks or to-dos within the To-Do Bar.

You can rename an existing category to “Limitation Date” as in the above picture (coloured red). Now you can “tag” a to-do as a limitation date – and it would appear with this red box next to it –bringing it prominently to your attention.

You can also use categories for appointments in the calendar and mark them as limitation dates:



Once you have created “Limitation Date” as a category, you can click on “Categorize” and specify an appointment in your calendar as a limitation date. The extra visual “kick” that this adds to the appointment makes it stand out.

Here is how the appointment stands out in your calendar:

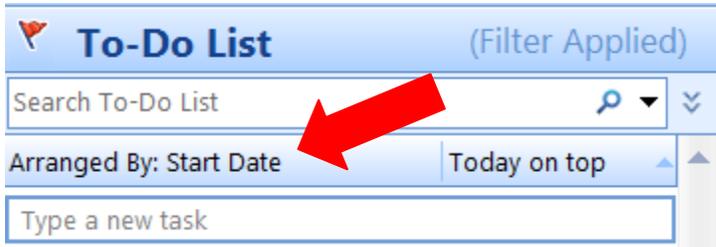


Managing tasks in Outlook

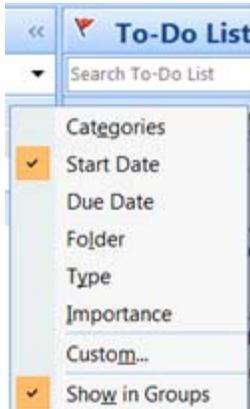
We all of us have busy lives, with multiple events, appointments and deadlines. That is why it is so important to get into the habit of doing a weekly review of all of the tasks, appointments, deadlines and, yes, limitation dates that are coming up in your schedule (and in the schedule of everyone in your firm).

This will accomplish several things, not the least of which is give you a heads up on the things that you *must* do from a practice standpoint. It will also accomplish several secondary goals. One is to give you a realistic overview of the things that you have committed to do – and prevent you from taking on new tasks that will take away from your existing priorities. It will also allow you to realize the amount of work that you may be delegating or passing on to others in your team – and whether or not they handle these tasks within your time constraints.

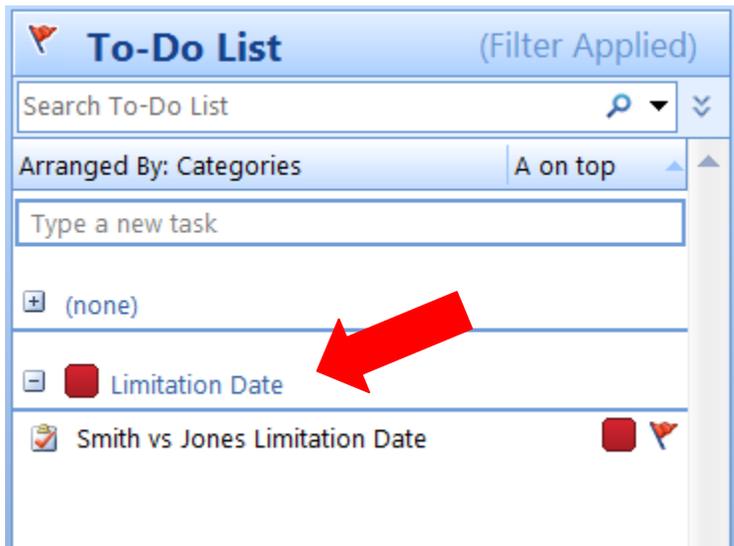
Microsoft recommends that, once you have reviewed your email, you switch to tasks (by clicking on “Tasks” at the bottom left of the navigation pane). This way, you won’t be distracted by incoming emails and will concentrate on the tasks and items in your To-Do Bar. You can sort your tasks by clicking on the “Arranged by” icon at the top of the To-Do Bar:



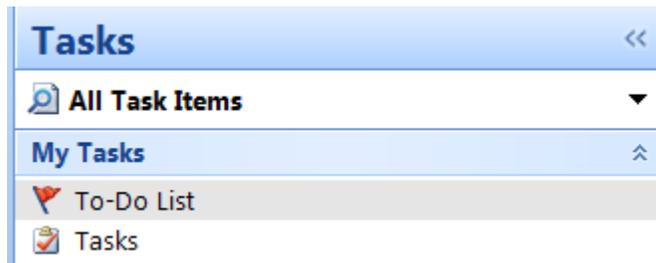
The default is Start Date, however, you can change the view to sort your tasks by categories:



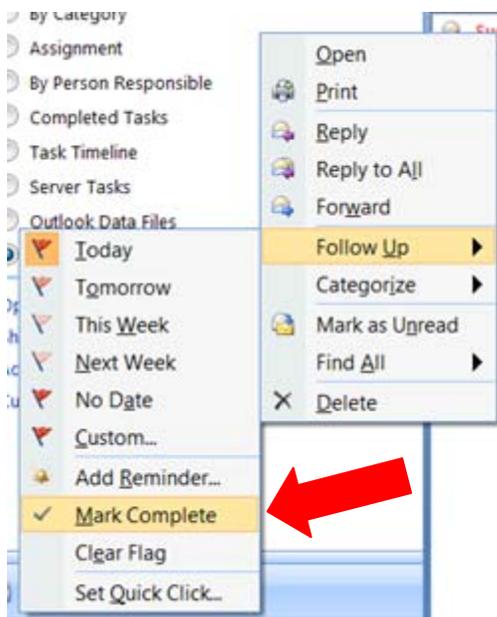
That means you can choose to sort by your newly created category “Limitation Dates” (and, if you have taken the concept further, you can also create categories and view tasks for “Closings,” “Court Dates,” etc.):



Whether you choose to work using the task view or the to-do list view ...



... be sure to mark tasks or to-dos as done, so Outlook will keep a record of completed items (useful to show that you have done the required action in time). You can do this by right-clicking on any to-do, then clicking on Follow Up and then Mark Complete.



The To-Do Bar

Using these tips may benefit your firm if you are substituting Outlook for practice management.

You can use Outlook tasks to help manage your files and make sure you complete all necessary tasks by required deadlines. Since only today's and overdue tasks appear by default in calendar view, you can do the following to systematically track your client matters:

- Drag and drop email items that require follow-up onto your task list in Outlook, or onto the calendar if making an appointment. All of the information from the email will be saved within the new calendar task or event.

- Create one main task for every matter, and indicate in point form in the subject area what is to be done, what you are waiting for, what dates are coming up, etc. You can also create other separate tasks for related tasks or deadlines.
- As discussed, use the category field to distinguish items by Limitation Dates, Closing Dates, and other important and reoccurring task categories. If you create a category for each important type of task you are working on, and then link your entries to the appropriate matter, you will have an easier way to filter your dates by category (such as limitation dates).
- Start the subject in all work-related tasks with a right-angled bracket (>), followed by the client name in uppercase. This makes individual client matters easy to spot. Create personal items without the bracket, and they will appear at the bottom of the task list.
- In calendar, set tasks to be sorted alphabetically by due date (right click on the column heading, and chose this sort type) or by categories (that will show your limitation dates).
- As you complete work on any particular matter, edit the subject to add a description of what is to be done next, and enter a due date. Doing this will make you trip over each matter at the appropriate time. As well, a quick review of the subject of any task lets you know the exact status of every client matter.
- Set alarms on tasks to remind you of a limitation period or other important deadline. These alarms will pop-up reminder windows on the time and/or date specified.

Limitation periods summarized

You can manage limitation dates in Outlook many ways. We have presented two main ways to use Outlook to track and remind you of upcoming limitation dates. These are:

Appointments:

- To keep track of limitation periods in Outlook via appointments, create an appointment in your Outlook calendar on the date of the limitation date (and, we suggest, also three, six and 12 months in advance to give you additional warnings).
- Create a category named “Limitation Date” and classify your appointment as such.
- The appointment will clearly show up in the assigned colour when you open your calendar.

To-dos/tasks:

- Create a “New Task” in the to-do bar. Use categories to label it as a “Limitation Date.”
- Once a week, look at your tasks arranged by categories (to clearly see all your upcoming limitation dates in a list) and by due date (to review upcoming deadlines).

Backup systems

While there are many advantages to moving to an electronic calendar, firms should also have a paper-based central calendar back at the office that serves as a backup system, just in case. After all, every firm is well-advised to have an electronic data backup and disaster recovery system in place, and a paper calendar is yet another form of data-backup!

You may also consider synching Outlook with other online calendars, but be aware that other calendars may not have the feature richness of Microsoft Office 365, the online version of the venerable Microsoft Office suite, is also an excellent (and inexpensive) way to back up all your calendar data. (office.microsoft.com/en-ca/).

Date calculators

Outlook does not have a built-in date calculator that can be used to calculate, say, “60 days prior to [limitation date]” to create a reminder and embed it in your calendar or in tasks.

However, many of the other practice management products out there do have this capability, in one form or another. You have to be mindful if you have used this to create chained or linked events, as they are called, to remind you of upcoming limitation dates. For example, if you create a template for getting reminders of one year, 90, 60, 30 and 14 days prior to a limitation date, you will need to go back and look at the template to ensure that the limitation dates are in alignment with the new *Limitation Act* (in force June 1, 2013). Failing to do so may result in the wrong dates being entered into your system.

Shared calendars

The real benefit of moving to an electronic calendar system is the ability to share calendars and see another person’s deadlines, appointments and tasks, whether they are in the office or not. Another best practice is to delegate one person in the firm to be responsible for all upcoming deadlines. That person will draw deadlines to the appropriate person’s attention, and ensure that they are, in fact, dealt with. For deadlines that are “drop dead,” substantive limitations, adapt

Outlook as your firm's centralized diary system. Be sure to adopt formal, written procedures in your office policy and procedures manual, to ensure limitation dates and reminders are entered in a clear and consistent manner, are properly delegated and are followed up.

Outlook has at least two ways to share calendars in an office setting.

One way is to use Microsoft Exchange. Exchange is an application that allows everyone in an office to connect their Outlook calendars, among other services. The other way is to publish your calendars on the Microsoft Office website and determine who can see what information (using Microsoft Office 365).

The ability to share calendars is considered a best practice; just make sure shared viewing of tasks and appointments on calendars is enabled. You can mark personal or client appointments as private, to ensure the protection of confidentiality and privacy.

This requires installation of Exchange on your network servers or use of a hosted Exchange service. In Canada there are a number of vendors who will provide hosted services, including:

- Telus (about.telus.com/serviceprovider/products/collaboration/hosted_unified_communications/hosted_exchange/),
- Bell (www.bell.ca/shop/Sme.Sol.Applications.Bhme.page),
- BMC Networks (bmcnetworks.ca) and
- i-worx (i-worx.ca)

Costs for hosted Exchange services range from approximately \$2.50 to \$30 per user per month, depending on the level of services you choose.

For more information on Office 365, you may contact BMC or i-worx and inquire about their Office business solutions for lawyers. The added advantage of an Office 365 installation with a trusted provider is your data is also backup up by the provider – giving you one more level of protection.

Conclusions

When it comes to limitation dates, no firm can be too careful. Fortunately technology can assist in many ways and help draw important dates, events and to-dos to your attention, minimizing the risk of missing a limitation date. The important fact is to adopt a system that incorporates best

practices, is documented in the office policy and procedures manual and is followed by everyone in the firm.

Note also that the new *Limitation Act* came into effect on June 1, 2013; for more information on legislative changes, see “[Ten tips to beat the reset clock](#)” in the Summer 2013 *Insurance Issues: Risk Management*.

If you have any questions, please email . David J. Bilinsky, Practice Management Advisor at daveb@lsbc.org or call 604.605.5331.

The writer gratefully acknowledges the information posted by Microsoft.com to its various websites on using Outlook, portions of which have been incorporated here, as well as the invaluable input of Ben Schorr, author of “The Lawyer’s Guide to Microsoft Outlook 2010.”