



A Virtual Panel – Best Practices in IP

March 29, 2018

Moderator

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Panelists

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Individual Topics provided by

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Introduction

The focus of today's webinar is IP Best Practices as they relate to daily docketing duties, most specifically:

- **Procedures for docketing new cases**
- **Communicating docketing items to legal staff**
- **Running docket reports**



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Steps to Follow When Docketing New Cases

- **Docketing's role in conflict checks and opening of matters for new IP cases**
- **Creating unique docketing case numbers**
- **Should docketing require checklists or forms when processing new matters? If so, what types?**



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What Information to Docket

How much information should be docketed in IP cases?

Ex: Only bibliographic information and due dates? Remarks in actions – detailed, minimal or none?



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Status Checks vs. Reminders

What's the difference and what to docket?

- **Setting up manual status checks in the docket for actions without hard deadlines (ex: status checks assignments)**
- **Standard reminders within hard deadlines**



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Trackable Methods for Alerting Legal Staff to New Actions in Database

How a docketing team can alert the paralegal/attorney that a new action has been added to the docket (ex: office action)

- **Alert through docketing software**
- **Alert through email**
- **Other options**



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Closing Docketing Actions

- **When to close actions**
- **How to alert paralegal/attorney when an action has been closed in the docket**



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What Levels of Access Should Users Have to the Docketing Database

- **Should other (non-docketing) IP members have access to change information in the docket?**
- **To add and/or close due dates?**
- **Other specified tasks?**



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Docket Reports to Legal Staff

- **Docketing responsibilities regarding docket reports**
- **Time frame for dockets – weekly/daily**
- **Requirements for staff to answer docket on a daily basis (clear the docket before COB); should docketing departments send afternoon reminders for uncompleted tasks?**
- **Rolling dates – should the docketing team roll actions manually in the docket if not satisfied that day?**



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Closing

If there are specific topics of interest, areas you struggle with, or areas that you excel in, please let us know. If you have any interest in participating on a future IP Best Practices panel, also please reach out to us at practiceinformation@nationaldocketing.org.

The NDA is a member-driven organization and we greatly appreciate your input, participation and support.

Thank you so much for attending today's webinar!