



DENVER 2019

NATIONAL DOCKETING ASSOCIATION



7th ANNUAL CONFERENCE

A MILE HIGH!

DENVER, COLORADO

SEPTEMBER 22 - 24, 2019



President's Message



Welcome to Denver!

We are delighted that you are joining us for what will prove to be another lively and educational Conference. I'd like to extend special thanks to each of our sponsors and members who have worked tirelessly to create this valuable program just for you. None of this would be possible without their continuing dedication and commitment to the National Docketing Association.

We welcome our keynote speaker, Mr. Aaron Lukken, Esq., as well as all of our notable presenters, moderators and panelists. Thank you for sharing your time and knowledge with us. You probably already know Aaron from his wonderful contributions to our monthly newsletter. Witty and educational, Aaron's articles are a precursor to an uplifting keynote presentation that will highlight how critical our members are to the success of their firms. We are in the beautiful Rockies, after all, so we can guarantee there will be lots of references to mountain climbing and shouldering the loads of our lawyers to get them to the top!

Denver is an historic and charming city that boasts the largest city park system in the nation as well as the world's largest rodeo! We hope that you will enjoy meeting new colleagues and discovering new aspects of your job against the backdrop of the majestic Rocky Mountains.

Here are some reminders of effective ways to get engaged and get the most value out of the Conference. For those of you who are first-time attendees, we extend a warm welcome and hope you enjoy our new Buddy Program.

Interact with our sponsors: Our sponsors are as excited as you are to be here in Denver! They will be located in the area where meals and snacks will be served so visibility and accessibility are high. Have your questions written down and be ready to explain your current workflow with its benefits and limitations. Be ready to compare and contrast. Come away with more than just the swag!

Hold yourself accountable: Provide a summary or overview of what you learned to those back at your office. Plan to return with at least one new idea or plan that you can share or pursue. Don't go back empty handed. Why not set a SMART goal for yourself incorporating some topic or idea from the Conference?! This could gain you credibility back at the office as well as keep you focused during the conference.

Talk to us: If you want to hear more about one of the conference topics or think that one of the sessions may make a good monthly webinar, let a Board member know. The Education Committee is always looking for feedback and welcomes the opportunity to offer content to the entire membership.

Regards,

Elaine Screechfield, NDA President



Our Keynote Speaker



Aaron Lukken

Aaron Lukken, the "Chief Sherpa" at Viking Advocates and author of the Hague Law Blog, partners with a network of attorneys and agents around the world to assist lawyers and law firms across North America in navigating cross-border litigation. Aaron's two overriding reasons for doing what he does: (1) protecting his clients, and (2) making the practice of law more efficient and accurate. He does that by providing transnational litigation support, which is a fancy way of saying that he handles the issues in litigation that crosses borders – obscure issues, common issues, boring issues, frustrating issues... in any case, issues lawyers don't come across very often and might rather hand off to somebody else.

A J.D. graduate of the University of Missouri-Kansas City, Aaron lives and works not far from his alma mater. He and his wife, Peggy, operate a joint civil mediation practice, Cottage Mediation Services, LLC.

Our Speakers



Cecil Atkinson

Cecil Atkinson manages the firm-wide litigation docketing program at McGuireWoods. He started his docketing career at Sedgwick Detert Moran & Arnold over 25 years ago. Since that time, he has overseen various Project Management initiatives - three software conversions and the implementation of three docketing departments. Cecil worked at Sedgwick's New York office for 11 years, then the DC office of Katten Muchin Rosenman for 12 years as the Docket & Records Manager and now calls Richmond Virginia home at McGuireWoods. Among his accomplishments at McGuireWoods, Cecil has taken a small docketing operation of two individuals and built a Firm-Wide 21st Century docketing department of 10 Docketing Professionals in 24 months. Also, he created the firms Docketing Policy, Docketing Best Practices Manual, and the firms Docketing Portal page. Cecil believes that the sharing of knowledge is more than an opportunity but a responsibility. He is the happy recipient of the 2013 Urban Alliance Mentor of the Year Award.



Jessica Bengels

A graduate of Brown University (BA) and Fordham University School of Law (JD), Jess Bengels is currently the U.S. Senior Manager of Litigation Services at Latham & Watkins - overseeing a team which includes docketing, court, and eDiscovery legal services.

When not agonizing over a calendaring calculation or wrestling with a sluggish ECF system, Jess enjoys reading, swimming, and – most of all – spending time outdoors with her two young children, two old dogs, and her husband.



Ashley Campbell

Ashley Campbell is the Patent Training Manager for Morrison & Foerster LLP. In addition to training, she is responsible for analyzing firm systems and procedures and advocating change in the firm's patent practice to promote process improvements. Ashley is an alumni of the University of San Diego's paralegal school and has been working in patent prosecution since 2006, when Express Mail labels were a commodity and she was required to know how to work a fax machine. Outside of the patent world, she is an animal rescue advocate and is expecting her first human baby in November 2019.

Randy J. Curato

Randy Curato currently serves as Vice President–Senior Loss Prevention Counsel at ALAS, Inc., a risk retention group insuring lawyers across the United States and abroad. In that role, he counsels and educates lawyers on ethics, professional responsibility, and avoiding malpractice. Prior to joining ALAS in 2005, Randy was a partner at Bell, Boyd, & Lloyd LLC in Chicago. While at Bell Boyd for 18 years. Randy handled litigation, arbitration and trial of commercial, real estate, environmental, probate, product liability, professional malpractice, and contract cases. Randy started his practice in 1984 with Wildman Harrold Allen & Dixon where he handled litigation matters for three years. Randy earned his law degree with honors from the University of Notre Dame Law School in 1984 and served as Executive Editor of the Notre Dame Law Review. He attended Manhattanville College in Purchase, New York and graduated with honors in 1981.



Brit Davis

Brit is a trial attorney at King & Spalding, LLP, who focuses on patent disputes in high-stakes litigation involving complex technologies in US district court and before the PTAB. Brit has experience in all phases of patent litigation on behalf of both plaintiffs and defendants, from initial diligence investigations, through trial and appeals. Brit has been trial counsel to companies in cases where hundreds of millions of dollars were at stake. He has argued claim construction motions, evidentiary motions, JMOL motions, and discovery motions in district court and before the PTAB. Brit played a key role in helping to secure rare complete patent owner wins in two inter partes review proceedings on all claims under review.



Dena Eaton

Dena Eaton has over 16 years of experience working in the federal judiciary. She has gained valuable bankruptcy and district court experience during her time with two of the largest federal courts in the nation, Northern District of Georgia and Southern District of Florida. Dena graduated from Mercer University in Macon, Georgia with a B.S.S.S. in Public Safety and a minor in Digital Forensics. She later earned a master's degree with dual concentration in Cybersecurity and Forensic Intelligence from Utica College in Utica, New York. In early 2018, Dena became Chief of the CM/ECF Division, located in the Case Management Systems Office, Department of Program Services within the Administrative Office of the United States Courts. In her role as Chief, she is responsible for the development, security, and court support of the federal court case management system (CM/ECF).





Tara Kim Eberhart

Tara Kim Eberhart is the Director of Paralegal Services and Docketing at Dentons US. In this role, Tara oversees the 150+ member Paralegal program, the national General/Litigation and the Intellectual Property Docketing teams. Prior to the 2015 merger of Dentons and McKenna Long & Aldridge, Tara developed and supervised the firm wide paralegal program at McKenna Long for seven years.

Tara began her paralegal career in a small general practice firm, Michael Murphy and Associates, where she handled Family Law, Trusts & Estates and minor Juvenile criminal related matters. After three years, she moved to Oblon Spivak, one of the top IP Boutique firms in the country, to join their Patent Litigation practice. As her initial step into paralegal management, Tara was recruited by Morgan Lewis & Bockius to lead the Bio/Chemical team where she specialized in large scale, eDiscovery intense Intellectual Property (Patent) litigation.

Tara earned her undergraduate degree from the University of Mary Washington (1993) and her Masters in Legal Administration (MALA) from Marymount University (2011). She served as Co-Chair of the Washington D.C. Chapter of the International Practice Management Association (IPMA) and in 2018, returned as Chapter Chair. Tara is a Past President and Advisory Board Member of the National Capital Area Paralegal Association (NCAPA) and her program is a two time recipient of the Paralegal Program Excellence Award (2010 and 2014). Tara is a member of the George Washington University Paralegal Studies Program Advisory Board and a current member of the faculty (Adjunct Professor, Litigation). In 2015, she was awarded the GW College of Professional Studies Faculty Excellence award and was recognized by the GW Paralegal Alumni Association for her efforts on behalf of the paralegal students. She is a frequent speaker and author on issues affecting the paralegal profession and volunteers her time as a mentor to others exploring a career in legal practice management. Tara's career, association involvement and professional achievements are made possible by her husband Robert and their daughter, Madison.



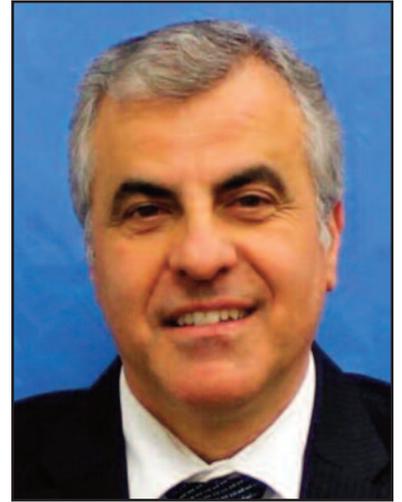
Susan Gelmis

Susan Gelmis is the Chief Deputy Clerk for Operations at the Ninth Circuit. She has been with the court for 30 years, starting as a Motions Attorney in 1989. In 1992, she became the Supervising Attorney for the newly established Pro Se Unit, which she helped to define and create. In 1993, she worked with the Court and the federal bar to create the Circuit's Pro Bono Program, which she directed for 22 years. She assumed the additional role of Supervising Attorney of the Motions Unit in 2000. Susan has served on numerous Circuit wide committees and task forces relating to prisoner and pro se litigation, and as liaison to the pro se law clerks in the district courts, organizing and speaking at Circuit wide and national conferences. In December 2015, Susan moved to the Clerk's Office to assume her current position as Chief Deputy Clerk, where she oversees all docketing and filing and calendaring systems and procedures, and organizes

and speaks at CLE programs around the Circuit. Susan is a 1987 graduate of NYU Law School and originally a native of New York.

Vito Genna

Vito Genna is the Clerk of Court for the United States Bankruptcy Court for the Southern District of New York and a Fellow at the American College of Bankruptcy. He assumed the duties of the Clerk of Court in February 2009. He began his career with the U.S. Bankruptcy Court for the Southern District of New York in 1990 as a Systems Administrator. In 1991, he became the Director of Information and Technology, and in December 2000, served as the Chief Deputy Clerk. Vito served on various committees for the Administrative Office of the U.S. Courts. He was directly involved with the development and implementation of the Case Management/Electronic Case Files (CM/ECF) system since its inception in 1993. He has over 30 years of experience in the management and technology fields.



Amber Goodenough

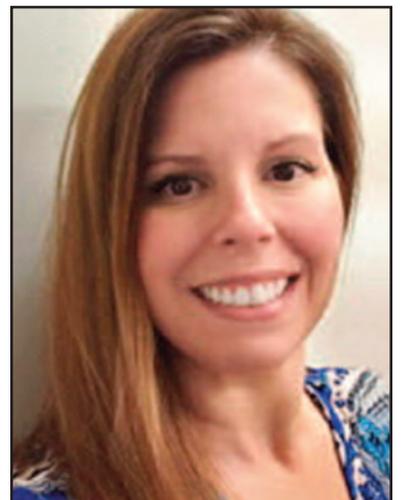
Amber Goodenough is Docket Manager & Counsel at Winston & Strawn LLP. She is a licensed attorney in the state of Illinois and has worked for the firm for over twelve years. In her role, she works to create and implement best practices in the areas of electronic court filing and centralized docketing. She collaborates with Business Development, Collective Intelligence and Research, and Information Services to find innovative ways to leverage her team's work to contribute to the firm's business development and knowledge management efforts.

She is an active member of the firm's Winston for Good (volunteering), Green Team (sustainability), and WINLife (staff engagement) teams. She regularly volunteers at Legal Aid Chicago's North Lawndale Legal Clinic which is sponsored by Winston & Strawn LLP and provides free walk-in legal advice on any civil legal issue. Amber is the former Co-Chair and current board member of the Chicago Literacy Alliance's junior board, the Literassociates. Amber received a B.S. in Legal Studies from the University of Wisconsin - Madison and a J.D. from The John Marshall Law School in Chicago.



Tracey Gulbicki

Tracey O. Gulbicki is the Global Docketing and Calendar Manager for Kobre & Kim LLP. As the Global Docketing and Calendar Manager, Tracey oversees the daily operation and training of 70+ firm users worldwide on the centralized calendaring system, provides quality control, develops calendaring best practices and advises on court rules. Over the past 6 years, she has been involved in two department implementations and led a software conversion. Tracey is a member of the NDA Membership Committee and has taken an active role in helping to start local chapters across the country. Since 2015, she has served as co-chair of the Washington, DC local chapter where she assists in developing continuing education topics for chapter meetings. Tracey had the distinct honor of receiving the NDA's 2017 Award for Outstanding Achievement in Docketing.





Kristin Hauser

Kristin Hauser is an IP Docketing Manager at Venable LLP. She has been working in the Intellectual Property prosecution field for almost 20 years. Prior to Venable, she was the Trademark Department Manager at Sughrue Mion, PLLC, an IP boutique in Washington, DC, where she oversaw the trademark paralegal and docketing functions. During her career, she has been involved in project management initiatives including multiple software conversions, integration of large lateral partner and client intakes, and implementation of a paperless environment. She has been heavily involved in docketing systems configuration, as well as development of department procedures, training materials, and forms. Most recently, she has been a member of the operations team coordinating the combination of Venable and IP boutique Fitzpatrick, Cella, Harper & Scinto.

She also serves as co-chair of the Washington, DC local chapter of the NDA.

She earned her Bachelor of Arts degree from Villanova University in 2001.



Jennifer Inghram-Martinez

Jennifer Inghram-Martinez is an IP paralegal specialist at King & Spalding, LLP. Her work concentrates on intellectual property disputes, including patent infringement, copyright infringement, unfair competition and misappropriation of trade secrets.



Denecchi Jackson

Denecchi (De-knee-shah) Jackson is the Managing Law Clerk Supervisor of the Skadden, Arps DC Office. While she began her career as a paralegal, for the last 18 years Denecchi's primary focus has been litigation docketing and case management. Denecchi oversaw the implementation of docketing software, including training, court resource management and database support. Additionally Denecchi oversees electronic filings and complex research requests, while also advising attorneys on court procedures. She also wrote the department manual for the DC office which contains all department policies, procedures and best practices.

Molly Kocialski

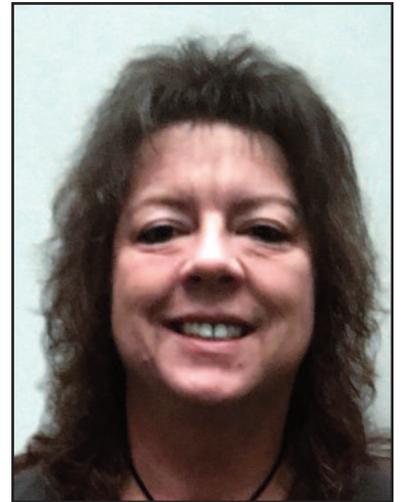
As the Director of the Rocky Mountain Regional United States Patent and Trademark Office (USPTO), since January 2016, Mollybeth (Molly) Kocialski carries out the strategic direction of the Under Secretary of Commerce for Intellectual Property and Director of the USPTO, and is responsible for leading the Rocky Mountain regional office. Focusing on the nine states within this region and actively engaging with the community, Ms. Kocialski ensures the USPTO's initiatives and programs are tailored to the region's unique ecosystem of industries and stakeholders.

A recognized leader in the Rocky Mountain Region, Ms. Kocialski currently serves on the Colorado Federal Executive Board's Executive Committee, as the President of the Colorado Intellectual Property Inn of Court, and as a member of the Planning Committee for the annual Rocky Mountain Intellectual Property Institute.



Wendy Lostumbo

Wendy Lostumbo has been in the IP docketing profession for more than 30 years. Wendy is currently the Docket Manager at McCracken & Gillen LLC. She has worked in large, medium and small law firms. Wendy is experienced in department management, hiring and training staff, as well as the preparation and filing of US and PCT applications and responses to patent office requirements in a paralegal capacity. She has been a member of the NDA since 2015 and values the sharing of knowledge and experience that results from membership.



Susie Newman

Susie Newman is an IP paralegal in the Trial and Global Disputes Practice Group at King & Spalding, LLP, providing direct support during all phases and aspects of the patent litigation process. Susie has more than 30 years of civil litigation experience and over 19 years of intellectual property litigation and prosecution experience.





Autumn Porter

Autumn Porter began her career with the United States Federal Courts in 2001 at the Bankruptcy Court for the Western District of Tennessee in Memphis, TN. After fifteen years of work in Information Technology, she transferred to the Bankruptcy Court for the Southern District of New York in Manhattan as Court Strategist and Information Technology Officer. Autumn has been an integral part in the research and implementation of many projects for the Court, including national projects sponsored by the Administrative Office of the United States Courts as well as ideas brought forth from other courts throughout the country. Autumn strives to help the Courts move forward with efficiency and innovation. Autumn took on an additional role of Circuit IT Security Officer for the Second Circuit in January 2019 in addition to her role at NYSB.



Kimberly A. Soto

Kim has been in the IP docketing profession for more than 25 years. Currently she is the Docket Supervisor at Vedder Price. She has worked in many large IP boutique firms in Chicago, in all facets of IP as a Docket Specialist, Paralegal, Supervisor and Manager. She has been a member of the NDA since 2015 and values the sharing of knowledge and experience that results from membership.

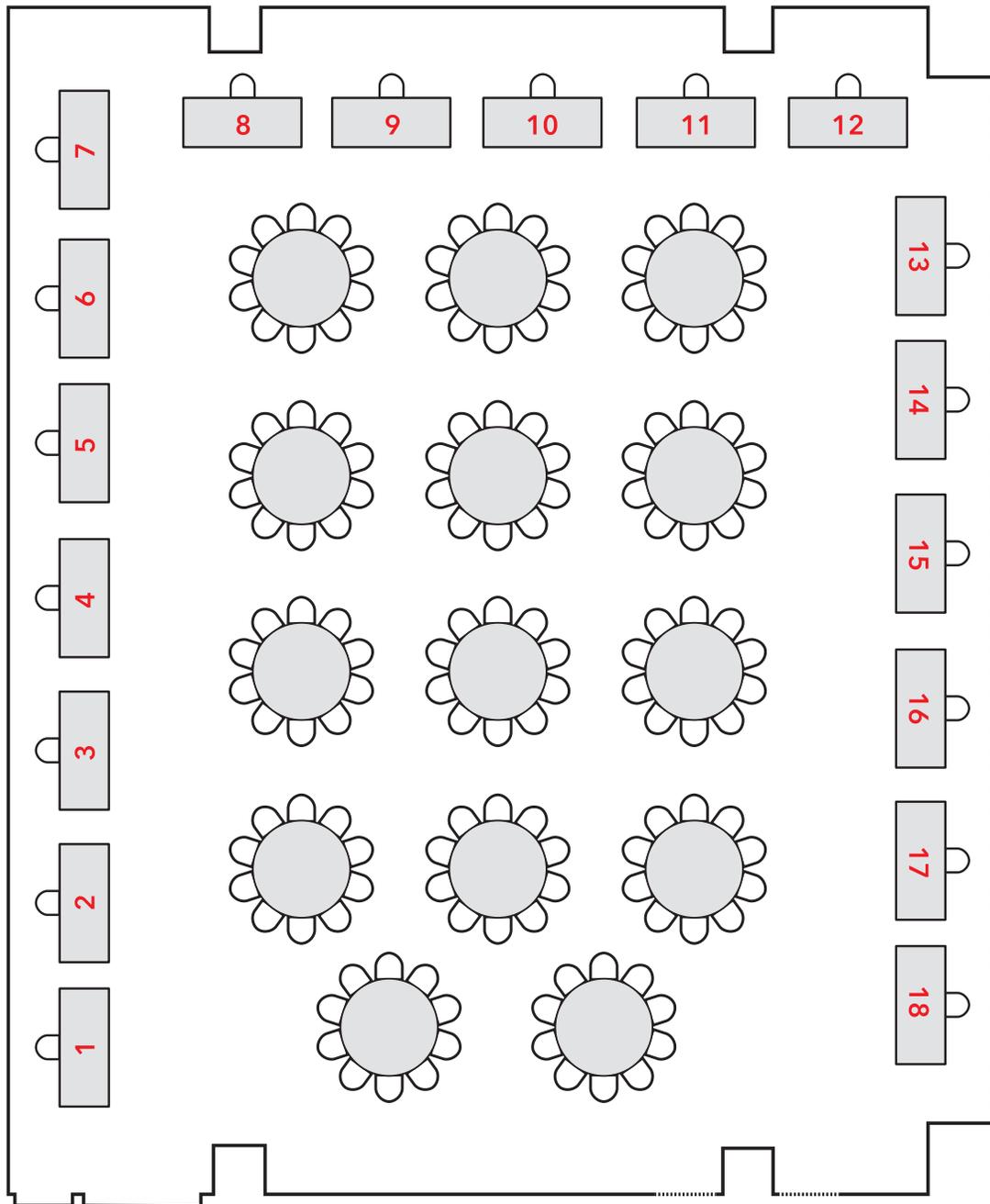


Chris Wolpert

Chris Wolpert has served as Chief Deputy Clerk for the U.S. Court of Appeals for the Tenth Circuit since 2014. Along with the Clerk of Court, Chris is responsible for the daily operations of the Clerk's Office, which manages the court's cases, dockets, records, calendar, and courtroom proceedings; serves as the public interface for the court and its judges; facilitates attorney admissions and discipline processes; oversees electronic filing; and enforces compliance with federal and local rules. Previously, Chris was Chief Deputy Clerk for the U.S. District Court for the Northern District of California, where he managed court operations in four offices serving over thirty judges handling one of the heaviest weighted caseloads in the country. As a court administrator, Chris draws upon his experience as federal law clerk, a litigator at the oldest and largest law firm in New Mexico, and an advocate for at-risk youth and people with HIV/AIDS. He also serves on several national committees and

working groups that focus on professional education and leveraging technology in the courts. Chris earned his J.D. and M.S.W. from Washington University in St. Louis, where he was an editor of the Washington University Law Quarterly.

Sponsor Table Listing



- | | | | | | |
|---|-------------------|----|---|----|------------------------|
| 1 | PacerPro | 7 | NDA Local Chapters & Membership Committee | 13 | NDA Board of Directors |
| 2 | American LegalNet | 8 | Thomson Reuters | 14 | ECFX |
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| 4 | CPA Global | 10 | Patrix | 16 | Docket Alarm |
| 5 | LawToolBox | 11 | OP Solutions | 17 | Aderant |
| 6 | One Legal | 12 | Pedersen & Sons | 18 | CourtAlert |

Conference Agenda

Sunday, September 22, 2019			
	Session Name and Description	Presenters/Moderators	Location
1:00 pm - 6:00 pm	Registration		Foyer A
2:00 pm - 5:00 pm	<i>Pre-Conference Workshop</i>	Aderant	Lodo
2:00 pm - 5:00 pm	<i>Pre-Conference Workshop</i>	CPA Global	Larimer Square
6:00 pm - 7:30 pm	Welcome Reception		Ellyngton's
Monday, September 23, 2019			
7:00 am - 8:00 am	Registration		Foyer A
8:00 am - 9:00 am	Breakfast		Ballroom B
9:00 am - 9:30 am	<i>Welcome Remarks, Presentation of the NDA Docketing Award and NDA Business Meeting</i>	The NDA Board of Directors	Ballroom A
9:30 am - 10:45 am	<i>Keynote Address: Guiding Lawyers to Success: Be Your Firm's Sherpa!</i>	Aaron Lukken, Esq. <i>Attorney, Viking Advocates</i>	Ballroom A
10:45 am - 11:00 am	Morning Break		Foyer A
11:00 am - 12:00 pm	<i>Developing a Docketing Policy</i>	Randy J. Curato, Esq. Vice President - Senior Loss Prevention Counsel, ALAS	Ballroom A
12:00 pm - 1:00 pm	Lunch		Ballroom B
1:00 pm - 1:45 pm	<i>IP and LIT Best Practices, Round Robin, Part 1</i>	Moderators: The NDA Board of Directors	Prospector Suite
1:45 pm - 2:30 pm	<i>IP and LIT Best Practices, Round Robin, Part 2</i>	Moderators: The NDA Board of Directors	Prospector Suite
2:30 pm - 2:45 pm	Afternoon Break		Foyer A
2:45 pm - 3:45 pm	<i>Change Management</i>	Tara Kim Eberhart Director of Paralegal Services and Docketing, <i>Dentons</i>	Ballroom A
3:45 pm - 4:30 pm	<i>Vendor Panel</i>	Tier 1 Conference Sponsors	Ballroom A
5:00 pm - 6:30 pm	Cocktail Party	Sponsored by <i>CalendarRules & Thomson Reuters - Court Express</i>	Ellyngton's

Conference Agenda

Tuesday, September 24, 2019

8:00 am – 9:00 am	Breakfast		Ballroom B
9:00 am – 10:00 am	<i>USPTO Essentials and Best Practices for IP and Litigation Docketing Professionals</i>	Molly Kocalski Director, Rocky Mountain Regional Office, USPTO	Central City
	<i>Federal Panel</i>	Susan Gelmis Chief Deputy Clerk, U.S. Court of Appeals, Ninth Circuit Chris Wolpert Chief Deputy Clerk, U.S. Court of Appeals, Tenth Circuit Moderator: Bill McKay	Ballroom A
10:00 am – 10:45 am	<i>Training New Hires (IP) – Best Practices; and Mistakes to Avoid</i>	Ashley Campbell Morrison & Foerster, LLP	Central City
	<i>Electronic Filing in the Judiciary and Telework Capabilities</i>	Dena Eaton Chief, CM/ECF Division, Case Management Systems Office Administrative Office of the U.S. Courts Vito Genna Clerk of Court, U.S. Bankruptcy Court, SDNY Autumn Porter Court Strategist and IT Officer, U.S. Bankruptcy Court, SDNY/U.S. Court of Appeals, Second Circuit Moderator: Bill McKay	Ballroom A
10:45 am - 11:00 am	Morning Break		
11:00 am – 12:00 pm	<i>The Intersection of Patent Litigation and PTAB Proceedings – Look Both Ways</i>	Brit Davis, Esq., Jennifer Inghram-Martinez & Susie Newman King & Spalding LLP	Ballroom A
12:00 pm - 1:00 pm	Lunch		Ballroom B
1:00 pm – 1:30 pm	<i>Meet Our Vendors!</i>	Tier 1 & Tier 2 Sponsors	Ballroom B
1:30 pm – 2:30 pm	<i>Strategies for Success: Tips for Efficient and Effective Project Management in the Docketing Industry</i>	Cecil Atkinson, Olivia Bane, Kristin Hauser & Denechi Jackson Moderator: Tracey Gulbicki	Ballroom A
2:30 pm - 2:45 pm	Afternoon Break		Foyer A
2:45 pm – 3:30 pm	<i>IP Panel: Patent Prosecution Highway (PPH), Data Conversion, and Portfolio Intakes</i>	Tara Kim Eberhart, Wendy Lostumbo, Igor Olenich, Kim Soto & Leslie White	Central City
	<i>Litigation Panel: Creative Staffing Solutions</i>	Jessica Bengels Latham & Watkins LLP Amber Goodenough Winston & Strawn LLP Moderator: Elaine Screechfield	Ballroom A
3:30 pm – 4:15 pm	<i>IP Panel: Patent Prosecution Highway (PPH), Data Conversion, and Portfolio Intakes</i>	Tara Kim Eberhart, Wendy Lostumbo, Igor Olenich, Kim Soto & Leslie White	Central City
	<i>Litigation Panel: Leveraging Data & Analytics</i>	Jessica Bengels Latham & Watkins LLP Amber Goodenough Winston & Strawn LLP Moderator: Elaine Screechfield	Ballroom A

Session Descriptions

Monday, September 23, 2019

- 1) **Keynote Address – Aaron Lukken, Esq.**
Guiding Lawyers to Success: Be Your Firm's Sherpa!

- 2) **Developing a Docketing Policy**
Randy J. Curato, Esq.

This program will walk through the important components of a written docketing/calendaring policy and its corresponding procedures. To kick off the discussion, the program will examine the definition of "docketing"*, outline docketing goals, and review with the audience the responses to a survey poll provided to registrants in advance of the NDA conference.

*"Docketing": a system for lawyers and law firms to verify, record, remind responsible lawyers of, and comply with upcoming deadlines or other significant dates requiring action.

- 3) **Round Robins**
NDA Board

Conference attendees will be given the opportunity to network and engage each other in two chosen topics over two timed 45 minute sessions. These topics include: 1) Hiring/Remote Work; 2) Metrics/Analytics; and 3) Project Management.

- 4) **Change Management**
Tara Kim Eberhart

Change is the norm at large organizations now. Some of the changes are due to growth opportunities and others are necessary to just keep the organization afloat. Navigating a team through change can be a huge management challenge especially if you are not a part of the larger, strategic conversation within your organization. Combine that with all of the normal, risk laden responsibilities of a docketing department on a daily basis and you have a recipe for stress and anxiety. Not only do you have to navigate and get your team thru the rapids of change, you also have to constantly advocate, market and/or educate your organization on the business/value proposition for docketing. Everyone knows the big missed date horror stories but what about the constant conversation about resources, budget, proper staffing and connection to the OGC/C Suite that your team needs in order to be informed and strategically aligned with what your internal customers want/need from your department. Answering these questions in the most stable of times is difficult but what about during leadership changes, staff turnover and the other people-centric parts of change?

- 5) **Vendor Panel (Tier 1 Sponsors)**
Come hear the latest and greatest from our Tier 1 Conference Sponsors!

Tuesday, September 24, 2019

- 1) **USPTO Essentials and Best Practices for IP and Litigation Docketing Professionals**
Molly Kocalski

Regional Director Molly Kocalski will present on what's happening at the USPTO, including the new authentication procedure for Private PAIR and EFS-Web, transitioning from digital PKI certificates to a single, unified USPTO.gov ("MyUSPTO"), mandatory electronic filing for trademarks using the USPTO's Trademark Electronic Application System (TEAS); the Proof of Use audit program, and best practices for specimens. Director Kocalski will also discuss the USPTO's initiative to speed up the examination process for corresponding applications filed in participating intellectual property offices via participation in the Patent Cooperation Treaty and Patent Prosecution Highway (PCT PPH). Director Kocalski will also discuss best practices and resources when addressing unauthorized changes to active trademark applications and registrations, including using the Trademark Assistance Center (TAC), and the Inventors Assistance Center.

Session Descriptions

Tuesday, September 24, 2019 (continued)

2) **Federal Panel**

Susan Gelmis and Chris Wolpert. Moderated by Bill McKay.

Susan will present an overview from the inside of case processing and caseload data in the Ninth Circuit. She will discuss recent and upcoming changes to rules, practices, and forms, and she will provide a guide to resources, filing tips and avoiding common filing mistakes. Chris will present a brief overview of the Tenth Circuit's jurisdiction, composition, caseload and process for managing appeals from filing to disposition. The majority of the presentation will focus on the procedural requirements that most frequently cause confusion, questions and errors, and provide information to assist practitioners and support staff in complying with the rules and policies that govern practice in the Tenth Circuit.

3) **Training New Hires (IP) - Best Practices; and Mistakes to Avoid**

Ashley Campbell

Comprehensive discussion on best practices to utilize when providing training to new hires and mistakes to avoid.

4) **Electronic Filing in the Judiciary and Telework Capabilities**

Dena Eaton, Vito Genna & Autumn Porter. Moderated by Bill McKay.

Panelists will discuss the current status of NextGen and CM/ECF throughout the country, PDF updates as well as a discussion on the success of telework in the Judiciary.

5) **The Intersection of Patent Litigation and PTAB Proceedings - Look Both Ways**

Brit Davis Esq., Jennifer Inghram-Martinez & Susie Newman

An overview of the intersecting relationship with Patents, Patent Litigation, and PTAB Proceedings, including IPRs/CBRs/PGRs.

6) **Strategies for Success: Tips for Efficient and Effective Project Management in the Docketing Industry**

Cecil Atkinson, Olivia Bane, Kristin Hauser, Denechi Jackson. Moderated by Tracey Gulbicki.

As each of us grows in our roles and takes on more responsibility, whether it be leading an internal team project, selecting software, implementing a software conversion or building a department, we can all use some guidance as to how to tackle these major tasks. Join our conversation as we share solutions and strategies for project management success.

7) **Litigation Round Table Panel Discussions**

Jessica Bengels & Amber Goodenough. Moderated by Elaine Screechfield.

Session 1: Creative Staffing Solutions

This discussion will explore effective interviewing techniques for interviewers and candidates and innovative staffing arrangements to meet the needs of any size department.

Session 2: Leveraging Data & Analytics

This discussion will explore strategies to breakdown institutional information silos, best practices to normalize internal docket data, and methodologies to fulfill analytics requests using internal and external resources.

8) **IP Round Table Panel Discussions**

Tara Kim Eberhart, Wendy Lostumbo, Igor Olenich, Kim Soto & Leslie White.

Patent Prosecution Highway (PPH)

This discussion will focus on strategies and benefits of utilizing this program. We will discuss pros and cons.

Data Conversion

This discussion will focus on best practices to normalize docket data and how events are classified and named.

Portfolio Intakes

This discussion will focus on common pitfalls and what firms do to streamline the efficiency of properly conducting an intake project.



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ALNDA

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American LegalNet, Inc. is a proud partner of the National Docketing Association and sponsor to the 2019 Conference.

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	id	Verse	Index Number	CF Number	Received	Plaintiff	Defendant
	134909	New York Southern District	19-cv-01704	183	6/3/19 3:25 PM	In re USG Bonds Antitrust Litigation	
	134908	New York Southern District	19-cv-01704	182	6/3/19 3:13 PM	In re USG Bonds Antitrust Litigation	
	134907	New York Southern District	19-cv-01704	181	6/3/19 2:11 PM	In re USG Bonds Antitrust Litigation	
	134906	New York Southern District	19-cv-01704	180	6/3/19 3:05 PM	In re USG Bonds Antitrust Litigation	
	134905	New York Southern District	19-cv-01704	179	6/3/19 3:05 PM	In re USG Bonds Antitrust Litigation	
	134904	New York Southern District	19-cv-01704	178	6/3/19 3:03 PM	In re USG Bonds Antitrust Litigation	
	134903	New York Southern District	19-cv-01704	177	6/3/19 3:02 PM	In re USG Bonds Antitrust Litigation	
	134902	New York Southern District	19-cv-01704	176	6/3/19 2:57 PM	In re USG Bonds Antitrust Litigation	
	134901	New York Southern District	19-cv-01704	175	6/3/19 2:46 PM	In re USG Bonds Antitrust Litigation	
	134900	New York Southern District	19-cv-01704		6/3/19 8:53 PM	In re USG Bonds Antitrust Litigation	

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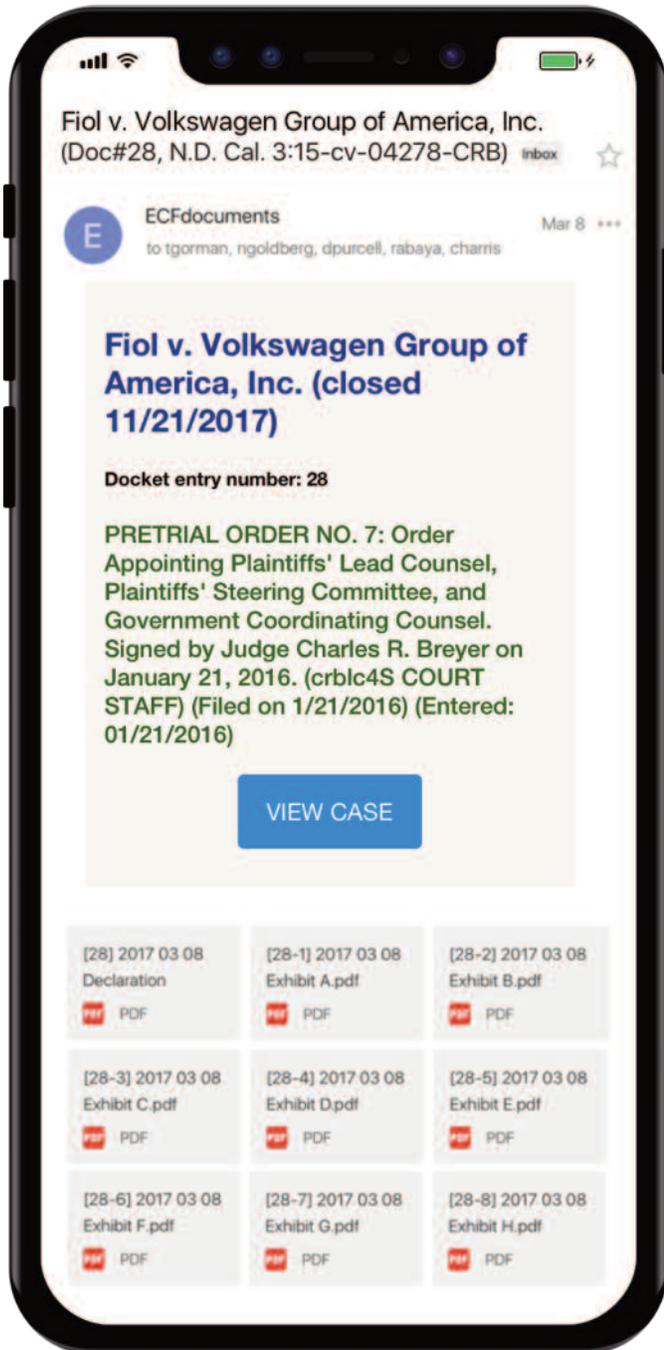
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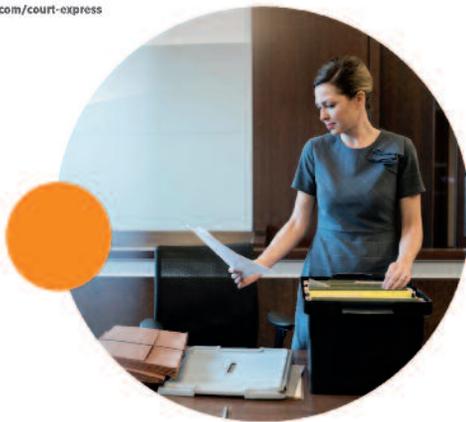
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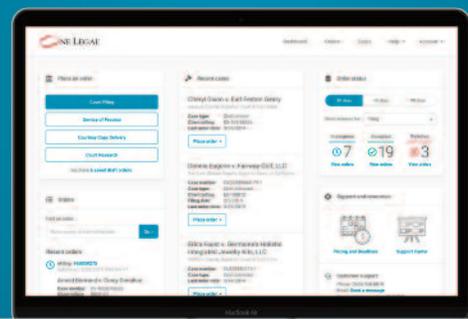
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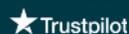
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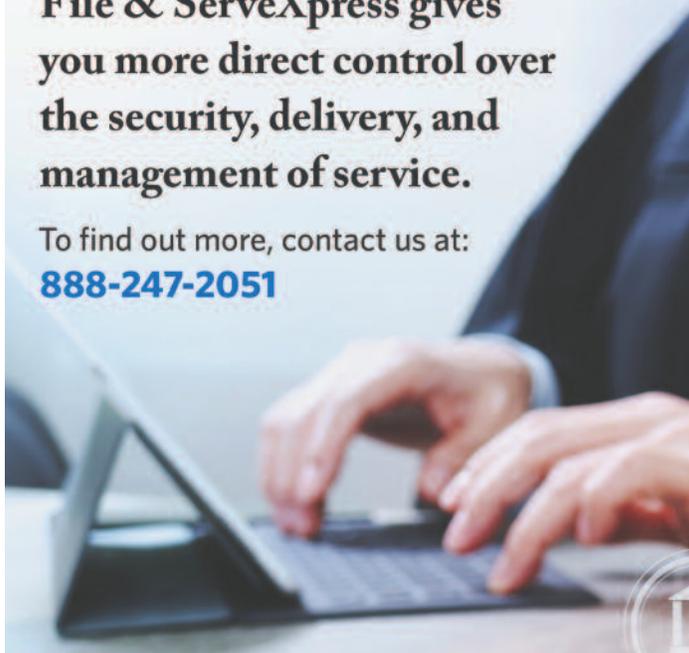
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Elaine Screechfield - President

Elaine Screechfield is the Firmwide Litigation Docket Manager at Morrison & Foerster LLP. For over thirty years, she has overseen centralized litigation docketing, including training, court resource management and database support. Elaine is the immediate past Chair of the Education Committee and past Chair of the SF/Bay Area Chapter. She has lectured at numerous forums including the San Francisco Bar Association; San Francisco Legal Professionals Association; (former) San Francisco Docket Association; National Docketing Association; 2014 Aderant Conference; and the Bay Area Legal Forum.

elaine.screechfield@nationaldocketing.org



Igor Olenich - Vice President

Igor Olenich is the Firm Wide Patent Docket Manager at Morrison & Foerster LLP with over 15 years of experience supporting attorneys with all aspects of IP docketing. He has worked in Litigation Docketing although, his expertise is in IP. His career, as well as his life, is diverse with a background in human resources, records management, and law enforcement. He has traveled and lived in a dozen countries. Igor is the immediate past Secretary for the NDA.

igor.olenich@nationaldocketing.org



Lindsay Owen - Secretary

Lindsay A. Owen is the Database Manager at White & Case LLP in New York City. At White & Case, Lindsay oversees electronic filings, maintains the Firm's case docketing system and advises attorneys on court procedures. Prior to White & Case, Lindsay began her career in the legal field at US Document and Retrieval Company as a Court Researcher. Prior to her role as NDA Secretary, Lindsay served as the Sponsorship Co-Chair on the NDA Board as well as the Technical Analyst on the NDA's Technology Committee. Lindsay was the recipient of the 2014 NDA Annual Achievement Award and is a graduate of Duke University.

[lowen@whitecase.com](mailto:l Owen@whitecase.com)



Mary J. Beaudrow - Treasurer

Mary J. Beaudrow, CCLS, is a Senior Docket Coordinator at Morrison & Foerster LLP. Ms. Beaudrow has been employed in the legal field for over thirty years, spending much of that time working in the attorney service business. Mary is a past president of Legal Secretaries, Incorporated, and California Association of Legal Support Professionals. She is a member of the National Docketing Association (and its SF Bay Area Chapter) and of Mt. Diablo Legal Professionals Association. She has lectured at a number of forums including San Francisco Legal Professionals Association, Livermore-Amador Legal Professionals Association, and the Bay Area Legal Forum.

mary.beaudrow@nationaldocketing.org



Olivia Bane - NDA Membership Committee Co-Chair

Olivia Bane is the Litigation Docketing Administrator at Venable, LLP. Over the past 20 years in the legal industry she has supported attorneys and staff, both in IP prosecution and litigation docketing. In the last 10 years she had the opportunity to oversee two firm-wide implementations of new centralized litigation docketing departments at Dickstein Shapiro and at Venable. She has managed 3 software conversions, trained users and staff on two calendaring systems (CompuLaw and eDockets), along with educating those users and staff on department services, procedures and best practices. She has also written three department manuals that contain all department policies, procedures, best practices and guides for using the front and back-end of the calendaring systems. She has served as the NDA Membership Committee Co-Chair for the past 5 years and is helping lead the efforts in instituting NDA chapters across the country to support the mission of uniting IP and litigation docketing professionals. She has conducted countless presentations at her firms and at several forums including the Aderant Momentum Conferences, 2014 ILTA Conference, and for the NDA in general.

olivia.bane@nationaldocketing.org



Krista Wilmot - NDA Membership Committee Co-Chair

Krista Wilmot has been involved in and supported the litigation practice of law for over 30 years working at such firms as Greenberg Traurig, Dickstein Shapiro and now Akin Gump. She began her docketing career as a Litigation Docketing Analyst in 2012 at Dickstein Shapiro. In 2016, she became the Litigation Docketing Manager at Akin Gump where she now manages the docketing services and support for the DC, Texas and California offices. Krista joined the NDA in 2012. In 2015, she was a panelist for the Roundtable for Non-Managers at the NDA Conference in Charleston. In the same year, she became the co-chair of the DC local chapter of the NDA.

kwilmot@akingump.com



William G. McKay - NDA Publication Committee Co-Chair

William G. McKay is the Managing Clerk at Willkie Farr & Gallagher LLP. As Managing Clerk, Mr. McKay is responsible for advising attorneys on court procedures and rules along with maintaining the firm's Litigation, Bankruptcy and Trust & Estates records. Mr. McKay has served on the following committees concerning electronic filing:

Rule Committees: New York State Courts, United States District Court-Eastern District of New York.

User Committees: New York State Courts, Second Circuit Court of Appeals, United States District Court - Southern District of New York, United States District Court - Eastern District of New York, United States Bankruptcy Court - Southern District of New York, United States Bankruptcy Court - Eastern District of New York.

Along with serving on committees for electronic filing, he has also provided advice and served on panels with the Association of the Bar of the City of New York and the Administrative Office for U.S. Courts.

Speaking engagements on electronic filing include the Seventh Circuit Court of Appeals Judicial Conference, United States Bankruptcy Court for the District of Delaware and Bloomberg LP.

wmckay@willkie.com



Leslie White - NDA Publication Committee Co-Chair

Leslie White is a Certified Paralegal at Cirrus Logic, Inc. in Austin, Texas. She has been involved in the docketing, IP and litigation profession for over 30 years, working at such multi-national firms as Vinson & Elkins, Morrison & Foerster and Arnold, White & Durkee. She now serves on the Education Committee and assists as an IP track organizer for the NDA annual conference. She was a recipient of the 2016 NDA Annual Achievement Award.

leslie.white@cirrus.com



Brian Owens - Education Committee Chair

Brian Owens is the Docket Manager at King & Spalding. Brian has been a member of the NDA since its inception in 2011 and a docketing professional with K&S since 2003. During that time, his firm has expanded from 4 offices to a top global firm with 20 offices worldwide. He has embraced the challenges of the firm's expansion with a focus on technology and a consistent customer experience. He was the 2015 recipient of the NDA Annual Achievement Award.

bowens@kslaw.com



JoAnn DiSanti - Executive Board Member

JoAnn DiSanti is the Associate Director - Managing Clerk at White & Case LLP, with over 20 years of experience leading the firm's Managing Clerk's Department. She is responsible for keeping track of the firm's Litigation and IP in all domestic offices. JoAnn is the immediate past president of the National Docketing Association. She served on the Motion Support Committee of the Supreme Court of New York County, assisted the United States Court of Appeals for the Second Circuit in reorganizing their website, and assisted various courts in beta testing their e-Filing systems. In 2001, she was the recipient of the Legal Aid Society of New York's award for Outstanding Pro Bono Representation. In 2017, she was the recipient of the NDA Lifetime Achievement Award. She is the author of an article published in the New York Law Journal, "Taming the court Calendar," October 20, 2008.

joann.disanti@nationaldocketing.org



Beth Hella - Executive Board Member

Beth Hella is the Senior Trademark Administration Manager at Foley Hoag LLP. Born and raised in the Boston area, Beth has been in the trademark docketing field for nearly 20 years. Her current role as co-chair of the Resource Library and former role as Treasurer of the NDA has allowed Beth the privilege of working with countless talented docketing professionals across the country. The enthusiasm of the NDA members inspires Beth to continue to work within the association to ensure it meets and exceeds the expectations of its members. It is with great pleasure that Beth serves as an Executive Board Member of the NDA.

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