# Calendar Control System Installation Checklist

Set up “events” or “appointments” (which means items timed and dated, *e.g.*, appointments and court hearings).

Set up “to-do’s” or “tasks” (which means items that might be dated but not timed, *e.g.*, prescription deadlines or research needed).

Add a to-do for each matter, at least for a periodic status check. Every matter must have at least one entry in the system at all times to avoid “the forgotten file syndrome.”

Consider using some type of visual aid, perhaps a monthly wall calendar. This allows you to see calendar squeezes early.

Put alerts (early warnings) on your calendar for key dates, *e.g.*, 21, 14, 7-1 days before the due date.

Double-check each initial entry. Early errors can later propagate throughout the system.

Add a to-do when any important matter is done, for follow-up as necessary.

Provide for periodic maintenance; try daily, weekly and monthly.

The calendar control person may delegate tasks but is always responsible. One person! Owing to the importance of this job, give it to the most compulsively gifted person in your office.

Install a backup system. At a minimum, make an entry in the calendar that reminds the calendar control person periodically to copy paper systems, backup local hard disk systems, and save a
download of cloud calendars.

Add calendar entries for key dates when you accept a representation, when you receive a hearing date or each time you put the file away. This prevents forgotten files. This is a good time to
double-check prescription dates.

Create detailed checklists that go with each element of your calendaring system.

A key to successful deadline management is using checklists as much as possible. These can remind you of dates and times that should be placed on your calendar system.

**PRACTICE AID GUIDE:** The Essentials of Law Office Management

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