



eDigest Mini



September 2022

PRESIDENT'S MESSAGE...

Thank you to everyone who took the time to respond to our webinar survey. The information provided will help us fine tune the program as we grow into the future. The webinar lineup for the rest of the year (with topics taken from the survey) is:

September 14: Deed Fraud in Arizona ([Register Here](#))

October 12: eDiscovery

November 9: Microsoft Word/Excel Tips & Tricks for Law Firms

December 2nd is our in-person Holiday Gathering & Charity Event from 5-8 p.m. at Orchard Events at 7100 N. 12th Street in Phoenix. Since we only have two in-person events per year, we encourage everyone to attend. Zoom is great, but we need to be face to face on occasion to strengthen the paralegal bonds. It is sure to be a friendly and fun evening. Bring a friend and get to know us better (and maybe even come away with a new friend). In addition, we are working with the Maricopa County Superior Court Drug Court to organize a toy drive at our event to support some of the children who are tangentially affected by the criminal justice system.

We're not stopping there on providing speakers from topics suggested in the survey. Plans are underway to provide a DEI speaker in January, a Personal Injury speaker in February and a Cross Border Issue speaker in March. Our social media platforms are being upgraded and more information will be available in the next few months through all platforms with the hope of reaching a larger audience. Feel free to comment on our posts and to forward the information to your friends. Our membership continues to grow and your membership referrals to friends and suggestions for programming and newsletter content (even authoring an eDigest article) are appreciated.

Until next time...be well!

Karen Flaaen, CP

We would like to share this space and highlight you and your accomplishments. Please consider sending us original works on topics of interest to our membership. Just reply to this newsletter with content and/or questions.

Membership NEWS

Welcome New Members

Buffy McCarty

Jessica Kurowski Giokaris

Lynn Pers Krcmaric

If you have any questions, suggestions or comments, please feel free to contact us at membership@azparalegal.org.

UPCOMING APA WEBINARS

Mark your calendars for the upcoming APA webinars!!!

- [Deed Fraud](#) in Arizona with Jesi Wolnik on September 14th
 - eDiscovery on October 12th
 - Word/Excel Tips & Tricks for Law Firms on November 9th
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HOUSTON PARALEGAL ASSOCIATION

An Affiliate of NALA - The Paralegal Association

NALA CP EXAM *Organizational Meeting*

Registration for Orientation Meeting: Free - initial meeting only
Register at www.hpatx.org August 30, 2022 @ 6:00 pm (Central Time)
Where: Online via Zoom

SKILLS REVIEW COURSE

When: September 13, 20, 27, 2022
Time: 6:00 p.m. - 8:00 p.m. (Central Time)
Where: Zoom Meetings

Registration for Skills Review Course:
\$75.00 for HPA members
\$125.00 for non-HPA members

The Skills Review Course will meet, via Zoom, each week (September 13, 20, & 27) to study and review the Skills portion of the NALA CP Exam.

You are responsible for purchasing your personal study materials.

To RSVP, please register online at www.hpatx.org.
Questions? Feel free to reach out mholmes@craincaton.com

The new CP Exam format is in two sections:
(1) Knowledge Exam and (2) Skills Exam

Candidates must pass the Knowledge Exam before receiving eligibility to take the Skills Exam.
Knowledge Exam is offered every day of the year.
Skills Exam is offered only in February / April / July / October

Please check the NALA website at www.nala.org for additional information about the CP Exam and to order your personal set of study materials.





SKILLS REVIEW COURSE

When: Sept. 13, 20, & 27, 2022

Time: 6:00 p.m. - 8:00 p.m. (Central Time)

Where: Zoom Meetings

DATE/TIME		EXAM TOPICS	POINTS	PRESENTERS
Tuesday August 30, 2022 6:00pm – 8:00pm (Central Time)		ORIENTATION		Ruth Conley, ACP Linda Carrette, ACP, TBLS-BCP Montye Holmes, ACP, TBLS-BCP Sandra-Lee Jordan, ACP
Week	DATE/TIME	EXAM TOPICS	POINTS	PRESENTERS
1	Tuesday 9/13/22	Writing: Grammar, Spelling, and Punctuation Clarity of Expression	12 6 6	Linda Carrette, ACP, TBLS-BCP
2	Tuesday 9/20/22	Critical Thinking: Reading and Comprehension Analysis of information Decision Making	18 6 6 6	Ruth Conley, ACP Montye Holmes, ACP, TBLS-BCP
3	Tuesday 9/27/22	Review		Ruth Conley, ACP Linda Carrette, ACP, TBLS-BCP Montye Holmes, ACP, TBLS-BCP Sandra-Lee Jordan, ACP





NALA'S WEBSITE: Visit www.nala.org for information on all things NALA, including certification, advanced certification, and upcoming webinars. Be sure to check out NALA Commons, an area where paralegals can network, ask questions, get advice, and share valuable information with one another.

NALA MEMBERSHIP: NALA provides exceptional continuing education and professional development for Paralegals. Joining NALA gives you access to a number of benefits that can help you advance your paralegal career. Check it out here! <https://www.nala.org/Membership>

NALA MILESTONE ANNIVERSARY MEMBERS: Are you celebrating a milestone anniversary with NALA? Each quarter, NALA honors and recognizes those individuals who have reached 5, 10 15, 20, and 25-year anniversaries with them. If you have reached one of these milestones, you are eligible to receive one of NALA's complimentary anniversary pins. Claiming yours is easy, just visit www.nala.org/about-nala/milestone-members to start the process. Congratulations on this achievement!

NALA FACTS & FINDINGS AND WEBINARS: NALA is always looking for individuals to write articles for their quarterly publication, Facts & Findings, and presenters of webinars. If you have a gift of writing or speaking, or simply want to try your hand at it, contact me at cheryl.viscontii@gmail.com. This will afford you the opportunity to gain national exposure and teach to others at the same time. You do not have to be a member of NALA to do either of these.

SAVE THE DATE: 2023 NALA Conference is being held on July 12-14, 2023, at the Westin Copley Place in Boston, MA . Mark your calendars and start saving your flight miles today!

UPCOMING WEBINARS:

[Life Care Plans - Experts and Paralegals Working Together](#)

Wednesday, September 7th, 2022 - 12 P.M. Central Time



Make sure your employer knows we have a FREE Job Bank! Please send ads to jobbank@azparalegal.org. To view current jobs please visit: <https://www.azparalegal.org/Jobs>



Recent Legal News:

Jurist:

[US Supreme Court vacates stay of injunction blocking Georgia election law](#)

Notary Bulletin - National Notary Association:

[How to Handle a Signature By Mark](#)

[When to say 'no' ... and when refusing a notarization is not allowed](#)

Other:

Complimentary Webinar: Making PACER and State Court Filings Easier

Do you receive notices of electronic filing from the court?

Do you have to manually download, label and distribute the documents? And then manually save those documents to your DMS?

PacerPro can help. Join us as Eric Dellon, Paralegal Manager, discusses how he has used PacerPro to streamline process and save time for years.

Individual licenses starting at \$30/month available, cancel anytime. 1-month free trial available.

**When: September 14, 2022
10-11 AM Pacific - 1-2 PM Eastern**

[**Register Here!**](#)

STUDENT RESOURCE CENTER

Question: I am currently working in a law office and am going to school to obtain my paralegal degree and certification. Will I be able to move up both in position and salary at my current job? How can I approach my attorney and let her know that I am ready for more?

Answer: If you are working in an assistant position at the moment, then you should be able to gain the experience needed to move to a paralegal position with your degree. A good way to approach this with the attorney, is to first discuss the expectations of the paralegal position and tasks. You can then ask the attorney to start giving you assignments that would allow you to learn the skills needed to become a paralegal. In most cases, taking on more responsibility will also lead to a raise if you are promoted to paralegal. Being up front about the expectations with the attorney is important.

Also keep looking at the APA's Job Bank for other internship opportunities and **GOOD LUCK!**



[Click Here for More CLE Opportunities](#)



Recipes

Some fun recipes to try!

[Smoked Pork Stuffed Shells](#)

[Simple Blueberry Basque Cheesecake](#)

[Tequila Watermelon Aguas Frescas with Prosecco](#)



A Little Inspiration for the Week

**"Autumn whispered to the wind, I fall; but always
rise again."**

- Angie Weiland-Crosby

eDiscovery Matters to Your Litigation Career

By: Ann Pearson

August 19, 2022

eDiscovery is not a bad word. It's actually the opposite. For those litigation paralegals who embrace it and learn everything they can about it, eDiscovery matters and has been a game-changer for their careers.

If you're not a litigation paralegal, this blog is for you too – because you could switch out the word eDiscovery here for any technology that your practice area uses to increase efficiencies, but you've been hesitant to adopt it – for whatever reason.

If you're in litigation, you most certainly are involved in eDiscovery, you're just not involved in the right way. You might not be doing it efficiently or effectively.

I know that sounds a little harsh, but think about it. When your client sends you their email files (in other words, electronic mail files), and your attorney wants you to print out all of those emails so they can review them and flag them; then give that paper stack to you for you to scan in the ones that they want to produce. You are handling eDiscovery. You're just not handling it in an efficient way. And some would go to the extent of saying, you're wasting time and therefore wasting the client's money. But that's not what we're talking about here.

Technology is Here to Stay

Look, we all know our world is an electronic world. It is all about technology. Unless you're someone who's intentionally gone off the grid and doesn't have a cell phone, a computer, a FitBit, or any other device – you are creating data and metadata every minute of every day. And so are your clients.

Now, it's highly unlikely that you fit into the off-the-grid category or you wouldn't be reading this blog.

Technology is easily accessible now, and mostly affordable. It is wearable – tracking our steps and our location.

Technology is mobile. Can be user-friendly. We use it for directions to where we are going. It tells us if we're going faster than the posted speed limit. It tells us if the store we are headed to will be open by the time we arrive.

Technology is a part of our everyday life. And it is a part of your client's everyday life.

eDiscovery Matters

Think about the family law paralegal working on a divorce case.

Did the soon-to-be ex-husband ask Alexa to Google how to hide assets from someone? Did he use Whatsapp or Facebook Messenger to communicate with his girlfriend? Does he have special software installed on his computer to prevent his wife from seeing what he's really doing online?

You won't ever know if you don't do eDiscovery. As the litigation paralegal working on that case, you can't do your job effectively without knowing how to handle eDiscovery.

What if you're a personal injury paralegal?

Maybe you don't think eDiscovery matters to your paralegal career because you receive those medical records and other documents (most likely electronically as a PDF now instead of paper). But what about when the case goes to trial? Are there things that will be used at trial that came in electronically, like emails, text messages, and audio messages to 911.

Or maybe most of your cases settle, this may apply to you when you consider if there are technologies out there that could increase your efficiency when it comes to reviewing and organizing medical records. Are you still printing out those PDFs, highlighting, and putting them into notebooks?

It doesn't matter what practice area you are in. Just replace the word eDiscovery with practice-specific technology.

There's a quote from Stewart Brand that I like and applies in this case, "Once a new technology rolls over you if you're not part of the steamroller, you're part of the road."

Your Future with eDiscovery

eDiscovery is not going away. It's only going to become more critical for you to know. In fact, I remember the day not too long ago when eDiscovery skills were listed in a job advertisement in the "preferred skills" section of the job description. Now, it's almost always in the required skills section. And that's why I am constantly talking about career security over job security.

You might currently be at a job at a small law firm with only a couple of lawyers and they're older. They like things printed and reviewed on paper. So you don't have to know much about eDiscovery for your job.

For your current job.

But what happens if those attorneys close the firm, downsize, or get bought out by a bigger firm? Now, in order to find another job as a litigation paralegal, you'll be required to have eDiscovery skills.

Think about eDiscovery just like you would think about any other skill you need to have as a litigation paralegal.

Because no one writes letters on paper anymore. Well, on a special occasion we might, but that's not happening like it used to back when I was growing up.

When was the last time you signed a contract on paper and put a copy in a file cabinet drawer?

Are there some businesses that still keep huge file storage rooms and go there to retrieve a copy of something? Sure, maybe there are some. But not very many.

Even the hold-out law firms who were still all paper in 2019 have gone electronic thanks to Covid.

Remember a decade or two ago when you would print out directions to go somewhere?

Or when you had to bring your camera to the drugstore to get your pictures developed and wait a few days to go back and pick them up?

How about when you used to have to write a check, put a stamp on it, and mail it to pay your power bill?

In fact, that's a really good analogy. If you were to do that now and added up the cost of an envelope, a stamp, and the cost of getting those checkbook refills, it might cost you 75 cents to send that check by mail, but it's free to pay that bill online or in the power company's app! And multiply that by thousands of payments.

That's what it's like when you're printing out all of those emails instead of utilizing eDiscovery technology. It doesn't seem like much at first but totaled up throughout the case, or throughout the year, it's a lot more than you think.

How Things Have Changed for Paralegals

If you're still only dipping your toes into eDiscovery and hoping it just goes away, or that maybe you'll be able to retire before you have to learn in...you're not alone. I hear that from someone at least once a month. They email me or call me and ask me about the eDiscovery Boot Camp and they tell me, they kept hoping it was going away, or that their attorney would stick with the paper method long enough for them to get closer to retirement.

I get it. I was part of the good ole days when document production from the other side arrived in piles of boxes or trucks full of boxes. I had to sift through all of that paper, armed with my stack of colored flags and post-it notes and my dictaphone, giving a summary of what was in each box. That little cassette tape would go to the word processing department or the secretary so it could become a production index.

If you're a paralegal younger than 35, you probably have no idea what I'm talking about. But the others, you're probably out there shaking your head because you remember those days.

If it was a review of our client's documents that we were going to have to produce to the other side, I'd be using my red flags for the privilege, yellow for confidential information, green for responsive, blue for XYZ, and the list goes on.

It was time-consuming! But I have to admit it was rewarding when I'd look into a room full of boxes and see that sea of red, yellow, and green flags. But that was 20 years ago.

At that time we were just starting to dabble in eDiscovery. Usually only when it was a bet the company type of case, because eDiscovery was not as prevalent back then. It was also not as user-friendly and accessible as it is now.

Embrace eDiscovery for More Opportunity

I can go through a whole list of reasons why you should embrace eDiscovery if you are a litigation paralegal, AND how it can actually make your job easier, not more complicated.

Transitioning to Litigation from Another Practice Area

By: Ann Pearson

June 13, 2022

Every practice area is unique and has its own ups and downs. In fact, even with the specialty areas of one practice area, they have their unique pros and cons. For example, within litigation – you might be a paralegal working in construction litigation, and what you would be doing would be completely different than if you are a paralegal working in personal injury litigation.

So instead of just jumping head first into the deep end of the pool, I want to give you some steps to take before just saying, "I want to be a litigation paralegal."

1. Make a List

Actually, it's two lists, but on one piece of paper. On the left side, write down all of the things that you don't like about what you are doing now in your current position.

Then on the right side of the paper (or column if you're making a list on the computer), write down all of the things you like about what you are doing now in your current position. Put the list aside for a few hours or a few days, and go back through it and read each of the pros and cons of your current position. Circle the top 3-5 on each side. What are the things you like and dislike the most?

2. Do a Self-Assessment

Then ask yourself, is there any kind of pattern to these things? For example, if 3 of the things you dislike are the long hours, last-minute emergencies, and your high-stress level...then ask yourself will this change in this new practice area? I can tell you for certain, that if you want to transfer over to your litigation department, you will not see a reduction in any of those three things! However, if you are a litigation paralegal who circled those three things on the left side of

your list, moving into estate planning or immigration might help you reduce them.

3. Map Out the Pros and Cons

Look at the entire list again, the one on the left – the cons, what you don't like about your current position – are there things on there that could be improved or eliminated from the list if you were to make some changes? For example, let's say it's the long hours you dislike the most. Are you working those long hours because you're getting distracted during the day and then have to work late to meet your deadlines?

If you are stressed because of long hours, follow these [pro tips for time management](#). Or are you working long hours because you come in at 8 and your attorney comes in at 10 and doesn't start cranking out the to-dos until after 1? Is there something you could do to reduce those long hours?

Here's another example: Let's say the real estate paralegal feels like it's boring work that she's doing and she thinks that litigation will be more exciting. If that's on your list, ask yourself if the work is boring because you're not asking for or receiving the interesting work that might be available to you. If you're a few years into your career, maybe your attorney is still holding back on giving you some of the higher-level work because he or she doesn't realize you've mastered the other stuff and are ready to step it up a notch. You have to ask. You have to communicate that to the attorney.

Now for every one of those questions you're asking yourself, look to the right side of the list and see if there's a corresponding pro or positive side.

It won't be matching, but it might offset the left side somewhat. For example, let's say on the right side you listed "enjoy working with these team members." And then ask yourself, what if the situation was flipped. What if I was doing work that was exciting, but I was working on a team that I didn't enjoy working with.

4. Review the Job Description

Read your firm's job description for a litigation paralegal AND go read a few other litigation paralegal job descriptions that you can find online.

Make yourself a bullet point list of all of the required skills and preferred skills that they are looking for in a litigation paralegal (or whatever paralegal position you are wanting to transfer to or move into). From that list, put a checkmark next to the ones that you have.

Now keep in mind with this one, you might not have the exact skill that's listed in the job description, but you might have a skill that is transferrable to that position. For example, the job description may have the skill of legal research and investigation skills. You haven't done much legal research in your commercial paralegal position, but you have done some big due diligence projects on those pending transactions. With a little bit of training, that skill would be transferrable.

5. Develop Your Skills

Next, you'll want to go get the skills that are on that bullet point list that don't have a checkmark on them. How? Get online and do some research on which classes you can take to fill in that gap. And make sure it's something that you can prove you did with a certificate, not just by watching a YouTube video. Make it something that your employer could verify if they wanted to.

Now I'm not saying it has to be a CLE certificate. We're not talking about CLE credits. Just a certificate of completion. You can't go ask to switch practice areas and say to them, I watched a bunch of YouTube videos that showed me how to draft discovery, and get ready for depositions and trials.

Even if you can't get all of those in one course, like our [Litigation Boot Camp](#), then maybe you find a bunch of short courses on each topic and slowly add more checkmarks to that list throughout the next year. Keep in mind, that enrollment closes for our [Litigation Boot Camp](#) on June 16th. So you may be reading this later in June, or even later in the year and the course may not be available. You can learn more about the course at paralegal-bootcamp.com/litigation if you are in litigation or want to transition to the litigation practice area. Or if you're a legal assistant who wants to eventually take on a paralegal role in your firm.

6. Talk to Others Working in that Practice Area

Talk to as many paralegals in that new practice area as you can so that you can get a better idea of what day-to-day life might look like for them.

Just like you made a list of the pros and cons of your current practice area, ask them what they like most and what they like least about that practice area.

Depending on the practice area, and WHY you want to move into that practice area, your conversation might even go one step further. For example, if you're like that real estate paralegal wanting to transition into a litigation paralegal position, and one of your motivations is that you want to go to trial. Ask those litigation paralegals how often they go to trial.

Just like everything else that's specific to certain practice areas, something like that can also be specific to different practice area specialties within litigation.

These 6 steps will ensure that you are thoroughly exploring the practice area you are considering transitioning to and that you are well-prepared for that transition.



Board Meeting

Upcoming APA Board meetings will be held on **Wednesday, September 7** and **Tuesday, October 4, at noon** via Microsoft Teams. Contact board@azparalegal.org for more information. All are welcome to attend.

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to our Sponsors!*

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