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As we adjust to the “new normal” of working from home and social distancing (new word for 2020), I hope everyone is doing well, staying safe and healthy. Many of us are working from home for the first time. I worked as a freelance paralegal and some things that I have found helpful include:

- Have a separate designated work area, even if it is a corner in your bedroom, living room or dining room table.

- Stick to your normal routine – get up at your normal time and get ready for work. I get up a little later than normal since I have no commute to work), shower and get dressed every day, not my normal work clothes, some days my shorts and a t-shirt or jeans. Getting up and dressed helps you feel like your normal work routine.

- With health clubs and gyms closed, consider getting up earlier and take a walk before work or at the end of your day.

- Take your regular breaks and DO NOT skip lunch. You want to keep your normal work routine and taking regular breaks helps to refocus. I text coworkers during my lunch break to stay in touch. If you have a dog, take him/her for a walk on your break.

- Stop working at the end of your normal workday. It is very tempting to want to work a little bit longer since you are working from home, but you need to separate work from your home life and something you think will take 5 minutes may end up taking longer.

- It is also tempting to do your household chores while working from home, you can start a load of laundry before you begin your day or on a break and fold the laundry during your lunch break or after work.

- Don’t forget to drink lots of water throughout the day to stay hydrated!

- Don’t forget about self-care. We cannot go out and get our hair cut or nails done, but you can give yourself a manicure or pedicure. How about reading a book, catching up on your favorite hobby (I love to scrapbook) or learn a new hobby, play a game, take a bubble bath. I’ve been having a virtual happy hour on Friday evening with my girlfriends.

- For those parents who are also homeschooling their children, keep them on their normal school schedule.

Hoping we can all get back to normal very soon.

The Board of Directors is scheduled for a virtual board meeting via Zoom July 31 through August 2, 2020 due to health and travel concerns related to Covid 19. Our members’ safety and health are important to us, I am in regular contact with our Headquarters Staff and monitoring updates related to Covid 19 and we will continue to update the membership of any programming changes.

The Minneapolis Paralegal Association and NFPA Convention Committee has worked hard to plan the 2020 NFPA Annual Convention and Policy Meeting. Now that the event is virtual, I’m excited to invite ALL members to join/attend online to enjoy the same great programming. We get to Minneapolis for next year’s Joint Conference it will be 10 years since I visited the Mall of America during NFPA’s 2011 Convention. I cannot wait to visit Callisters Christmas store.

The following board positions will be elected during this year’s Annual Meeting:

- President
- Secretary & Director of Operations
- Vice President & Director of Positions & Issues
- Vice President & Director of Paralegal Certification
- Region Director Region 1
- Region Director Region 2
- Region Director Region 3
- Region Director Region 4
- Region Director Region 5

I know you have been working on submitting award nominations and I’m excited to honor these awards during our virtual event. We will also announce scholarship awards and share the excellent student essays on the topic The American Bar Association’s House of Delegates adopted amendments to Resolution 102B, Guidelines for the Approval of Paralegal Education Programs, during its midyear Meeting held February 2020, revising the definition of a paralegal to eliminate references to legal assistant “...to be more reflective of current terminology used by the legal community.” Please explain how you believe this change will affect the paralegal profession as well as efforts for improving Access to Justice.

Please contact me at president@paralegals.org if you have any questions, comments or concerns or if you have exciting news to share.

NITA SERRANO, RP®, AACP, FRP
PRESIDENT
VP Marketing Message

Aloha!

Warm are the summer days and memories we have transitioned to a new norm while we find creative ways to connect, protect and adjust. It is important to know during these times, we must rely on social distancing to bring ourselves together remotely – you are not alone, and, here at NFPA, we continue to be your partner in the paralegal profession.

In the Spring Issue of the National Paralegal Reporter (NPR), we rolled out a new member spotlight feature that many enjoyed reading. Since then, we have had people reach out to us and contributed stories to support this publication.

I would like to recognize a group of volunteer leaders who are passionate and take initiative to support NFPA’s Mission and Values. Social Media Coordinator, Tisha Delgado, ILAP, maintains NFPA’s social media sites. She is phenomenal and passionate on keeping all engaged and informed of recent paralegal and career trends. Join us, stay connected and add NFPA on Facebook, LinkedIn and Twitter.

Internal Marketing Coordinator, Josie Estes, is reliable in gathering information and ideas for the News You Can Use. This weekly membership benefit provides members the latest NFPA-related news and provides valuable tips and instructive vocabulary. Are you taking advantage of reading this weekly member benefit to see how NFPA is committed to the paralegal profession?

Editorial Coordinator, Wendy Otto, R.P.* along with the Editorial Committee have infinite patience as they review all articles and share ideas to bring to you each issue of the NPR. Together, along with our creative Editor Rachel Daeger, CAE, IOM; this team is truly in sync and produce this Summer Edition of the National Paralegal Reporter.

The Marketing team’s commitment is an essential role within NFPA as they foster independent qualities in their individual roles with traits of passion, energy and optimism to make NFPA interactive and help us succeed. We continue to broadcast and communicate the latest news and trends while providing accurate information as we brand NFPA—The Leader of the Paralegal Profession*.

All NFPA Coordinators are great volunteers who realize that everything they are doing with integrity and reliability is a direct representation of the organization they are volunteering for. Keep up all great work!

Feeling the angst of social distancing, together we can continue to pine for human connection and maintain a perpetual lifestyle through sharing our personal stories, professional insights and accomplishments in the NPR – we will continue to develop a closer relationship with our colleagues, partners and paralegal students. In our shared future, we will learn lessons that will ultimately help us do better, stay current and enable us to uplift each other.

Continue to make smart choices that protect your family and community around you. Be healthy. Stay cheerful. Take care. Live Aloha.

RONELL B. BADUA
VICE PRESIDENT & DIRECTOR OF MARKETING
Hi! Ron has graciously offered me space in his VP of Marketing message. At the time this issue goes to print, many of us are adjusting to new working conditions due to COVID-19. For some of us, our home office is a kitchen table shared with now homeschooled children, for others an office with pared down personnel, an increase in daily cleaning and sanitizing, and new personal health protocols.

In the next few months the way business is conducted will change, even for the paralegals. The National Paralegal Reporter (NPR) has always represented the changing trends in our profession. Now is the time to document how the job has changes, or how it hasn’t.

The articles in this issue offer insight into specialized practices: Infringement and Intellectual property, and being a virtual freelance paralegal. We encourage you to share your specific expertise in a future issue.

Best –

WENDY OTTO, R.P.
EDITORIAL COORDINATOR

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Social Media Evidence and the Expectation of Privacy

By Joseph Jones

Over the last decade, the use of social media has exploded. Somewhere between 80-92% of Americans use some form of social media to connect with friends and family members. Between Facebook, Instagram, Twitter, Snapchat, TikTok, etc., it is not uncommon for an individual or an organization to have a half dozen social media accounts or more. These social media accounts can offer invaluable insight during litigation, but oftentimes accounts can be set to “private” and the content from these accounts can be restricted, which begs the question “can private content be accessed, and if so, is that content admissible in court?”

Social media and the expectation of privacy is a hot topic in courthouses across the United States, and there are a variety of potential scenarios to be considered. To understand one aspect of how this question plays out, we’ll take a look at the case of United States v. Meregildo (2012 WL 3264501, (2012)).

UNDERSTANDING THE CASE

In United States v. Meregildo, the defendant Melvin Colon posted messages on Facebook detailing acts of violence and threatening new violence against rival gangs. He filed motions to suppress this evidence on the basis that when law enforcement accessed these posts, they violated his right to an expectation of privacy. He believed that since his privacy settings on the posts in question could only be viewed by “friends”, he had a reasonable expectation of privacy. During the course of law enforcement’s investigation, they were able to access this information, because one of the defendant’s Facebook “friends” had cooperated with law enforcement, giving them access to view Colon’s profile.

The Judge in this case evaluated the evidence in the context of Colon’s privacy settings and his circle of friends. The Judge denied Colon’s motion to suppress and said that his Facebook information was lawfully obtained and used in this case.

The privacy settings used by Colon allowed the cooperating witness, Colon’s Facebook “friend” to see the messages that he posted to his account. As such, the Judge ruled that accessing this information was not a violation of the Fourth Amendment. Colon allowed “friends” to view his posts, and he had a wide circle of friends. The Judge believed that because of this, Colon’s expectation of privacy ended when he posted on Facebook.

SOCIAL MEDIA AND A REASONABLE EXPECTATION OF PRIVACY

The Supreme Court has long held that a person has a protected right to a reasonable expectation of privacy. The constitution protects this right. However, when it comes to social media, this expectation is not absolute, and frankly it is almost non-existent. This is because by design, many people can view the information posted on social media. Unlike private electronic communications (personal emails, direct messages, etc.) meant for only one or a select few, social media posts are intended to go to a wide audience, oftentimes hundreds or thousands or people, and in turn, that audience can share the content with whomever they chose.

This case is similar to many others in different circumstances, where the courts have ruled that not only is there not an expectation to privacy on social media; in both criminal and civil lawsuits, the opposing party has a right to review any social media postings, public or private, that are relevant to the issues at hand (see www.boscolegal.org/court-resources/social-media-case-law).

GETTING THE CONTENT IS ONLY HALF THE BATTLE

Keep in mind that having access to online posts is often only half the battle. To ensure the admissibility of the posts in court, the content also needs to be forensically preserved, which includes preserving the content, extracting the metadata, and creating a hash value (digital fingerprint). Additionally, both the account and the posts must be authenticated; essentially meaning that it must be verified that the accounts and the posts in question, actually belong to come from the person you claim they do.

JOSEPH JONES is a licensed Private Investigator and the Vice President of Bosco Legal Services, Inc. Joseph is a Certified Social Media Intel-
For those who are perplexed about the recent CARES Act legislation, the IRS has some answers for you. The organization laid out 14 common questions and answers to the May 4 Q&As concerning Section 2202 of the CARES Act, which offers special rollover rules and distribution options for IRAs and retirement plans while expanding permissible loans from specific retirement plans.

These questions target major areas of concern regarding the act, including the agency’s plan to issue further guidance. Aside from affirming their intention to do so “in the near future”, they specifically cite IRS Notice 2005-92 that give guidance on the tax-favored treatment of plan loans and distributions under sections 101 and 103 of the Katrina Emergency Tax Relief Act of 2005.

The IRS’ Q&A outlines how:

- COVID distribution taxes can be paid, either all at once in the distribution year or ratably over a three-year period.
- The repayment of said distributions can be done to recover taxes paid/withheld (amended tax returns for the years in question) and to utilize Form 8915-E to document any repayment of a coronavirus-related distribution and to calculate the amount of any coronavirus-related distribution includible in income for a year.
- The adoption of COVID loan provisions and distributions is elective at an employer’s discretion.
- The final day to obtain a COVID-19 loan with the increased limits is September 22, 2020 instead of September 23, 2020.
- The COVID distribution cannot be made from the pension plans, including money purchase pension plans any sooner than permitted under the pension plan rules.
- While it is projected that plans will allow COVID distribution repayments, plans that do not accept rollovers will not be compelled to modify procedures or terms to allow repayments.
- An eligible person may regard a distribution that meets requirements to be coronavirus-related distribution as such, regardless of if qualified retirement plan treats the distribution as a coronavirus-related distribution.

If you are an individual involved in the management of an employee retirement plan, you can face personal exposure to claims alleging breach of fiduciary duty. Colonial Surety Company offers fiduciary liability insurance for plan sponsors in our ERISA fidelity bond packages, which come with an ERISA bond, fiduciary liability insurance, and cyber liability insurance. Cyber liability insurance protects the pension and the business from cyber breaches. Fully protect your plan, yourself, and your company all in one place, instantly online. Contact us today to get your coverage online, instantly.

By Colonial Surety Company

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Colonial Surety Company is an NFPA Corporate Partner
Picture it: Stonewall Inn, New York City, June 1969. Early in the morning of June 28, several patrons of the Stonewall Inn were still mourning the passing of Judy Garland, whose funeral had taken place the previous day. Other patrons were at the Stonewall Inn as it was the only bar where gay men could openly socialize and dance. Raids on gay bars in New York City were commonplace at the time. However, the one that occurred on that morning did not go as planned.

Standard procedure was to line up the patrons, check their identification, and have female police officers take customers dressed as women to the bathroom to verify their sex, upon which any men dressed as women would be arrested. Those dressed as women that night refused to go with the officers. Men in line began to refuse to produce their identification. The police decided to take everyone present to the police station, after separating those cross-dressing in a room in the back of the bar. A sense of discomfort spread very quickly, spurred by police who began to assault some of the lesbians by “feeling some of them up inappropriately” while frisking them. The police were to transport the bar’s alcohol in patrol wagons. Twenty-eight cases of beer and nineteen bottles of hard liquor were seized, but the patrol wagons had not yet arrived, so patrons were required to wait in line for about 15 minutes. Those who were not arrested were released from the front door, but they did not leave quickly as usual. Instead, they stopped outside and a crowd began to grow and watch. Within minutes, between 100 and 150 people had congregated outside, some after they were released from inside the Stonewall, and some after noticing the police cars and the crowd. Although the police forcefully pushed or kicked some patrons out of the bar, some customers released by the police performed for the crowd by posing and saluting the police in an exaggerated fashion.

When the first patrol wagon arrived, the crowd had grown at least tenfold from the number of people who were arrested, and they all became very quiet. Confusion over radio communication delayed the arrival of a second wagon. The police began escorting Mafia members into the first wagon, to the cheers of the bystanders. Next, regular employees were loaded into the wagon. A bystander shouted, “Gay power!”, someone began singing “We Shall Overcome,” and the crowd reacted with amusement and general good humor mixed with “growing and intensive hostility.” An officer shoved a transvestite, who responded by hitting him on the head with her purse as the crowd began to boo. Pennies, then beer bottles, were thrown at the wagon as a rumor spread through the crowd that patrons still inside the bar were being beaten.

A scuffle broke out when a woman in handcuffs was escorted from the door of the bar to the waiting police wagon several times. She escaped repeatedly and fought with four of the police officers, swearing and shouting, for about ten minutes. Described as “a typical New York butch” and “a dyke–stone butch,” she had been hit on the head by an officer with a baton for, as one witness claimed, complaining that her handcuffs were too tight. Bystanders recalled that the woman sparked the crowd to fight when she looked at bystanders and shouted, “Why don’t you guys do something?” After an officer picked her up and heaved her into the back of the wagon, the crowd became a mob and went “berserk.” “It was at that moment that the scene became explosive.”

The spontaneous riots and raids that occurred over the next four days are often seen as the beginning of the gay rights movement in the United States. Eventually, gay rights organizations formed throughout the U.S. and the world. Gay pride marches soon followed. Harvey Milk would become the first openly gay man elected to political office in California when he was elected to the San Francisco Board of Supervisors in 1977.

With the rise of any social group, historical context is important. While I was aware of many of the incidents at the beginning of the gay rights movement, their importance did not resonate until I came out in 1989. When I eventually accepted being gay, the company at which I worked the time already had questions about my life away from the office. I remember my supervisor being asked shortly after my hiring about my lifestyle. She said, “it doesn’t
matter to me what he does away from work; when he’s here, he’s a hard worker.” I would keep her response with me, even to this day. At the end of the day, who we go home to, or who we date should not define our identity – it’s the quality of our work that should speak to our employers.

After graduating from paralegal school in 1990, my first job brought me in contact with the first gay attorney who also was one of my supervising attorneys. While we did not have a lot of interaction within the office, we both “knew” about each other’s proclivities. He also gave me my first real paralegal-related work assignment when he asked me to step in for the office investigator to interview witnesses on one of his cases while she was out on medical leave. (For context, I was hired as a receptionist/legal secretary). That assignment led to me also serving witness subpoenas. Again, who I would see outside the office had no bearing on the quality of work I was providing in this short-term capacity. That attorney would send a memo to the supervising attorney of the region to commend my stepping up to the challenge and handling all the requisite tasks with a high level of professionalism.

Throughout my legal career, interaction with members of the LGBTQ community in legal circles increased. During what seemed to be the “explosion of gay visibility” in the 1990s, asking if someone was “a friend of Dorothy” was common. My initial work in personal injury was with a lesbian attorney. Later work would put me in contact with other gay attorneys as well as paralegals. Involvement in paralegal associations has expanded those circles several-fold. Naturally, several would attain leadership positions in various capacities, myself included. Today, LGBTQ+ sections have been established in Dallas (https://dglbt.ba.org) and the State Bar of Texas (https://lgblawtx.com), along with most all states.

Society has evolved such that who a person sees socially has little bearing on whether to employ a candidate. Many of the larger firms have established groups dealing with the increased diversity of their employees. Spouses, regardless of gender, are encouraged to accompany their partners to social events within the firm and professional association gatherings. With the enaction of ordinances, executive orders and rulings such as Obergefell v. Hodges, 576 U.S. 644 (2015), the rights afforded to the LGBTQ community are becoming more in line with the rest of society. As a result, attorneys of all walks are receiving education on laws as they relate to same gender couples and families.

Naturally, those with the calling are following in the footsteps of Harvey Milk into the political world. What started as a select few who would dip their toes into the political pool has grown in waves in recent years. In 2018, at least 153 LGBTQ candidates won their political races out of at least 225 candidates endorsed by the Victory Fund, a nonpartisan political action committee dedicated to the election of LGBTQ candidates. Among the victors were Jared Polis, the first openly gay man elected governor of any state; Sharice Davids, not only a lesbian from Kansas, but one of the first two Native American candidates ever elected to the U.S. House of Representatives; and Malcolm Kenyatta, the first openly gay man of color elected to the Pennsylvania state legislature.

They join Danica Roem, the first openly transgender person elected to a state legislative body when she won her race in Virginia in 2017 and victorious 2018 incumbents Gov. Kate Brown of Oregon, who is bisexual, and Senator Tammy Baldwin of Wisconsin, a lesbian who was the first openly LGBTQ person elected to the United States Senate. Also of note, Annise Parker became one of the first openly lesbian mayors of a major U.S. city when she was elected mayor of Houston in 2010. Since then, Lori Lightfoot was elected mayor of Chicago in 2019. Of course, Pete Buttigieg’s campaign for U.S. President shattered many of the barriers and had previously only been a pipe dream for many: the first presidential campaign for a major party candidate by an openly gay person, and the first gay candidate to win a presidential primary or caucus.

The phrase, “We’re here, we’re queer, get used to it!” has certainly proven itself prophetic.
Infringement of Intellectual Property

By Luis A. Rodriguez

International Intellectual Property Rights infringement is a growing concern for United States companies especially in sectors such as pharmaceutical, agricultural, chemical & textile manufacturers as they spend billions in developing new products and in fighting piracy or counterfeit goods, resulting in huge revenue losses. Many countries understand the importance of intellectual property protection to the development of their economies as U.S. companies employ more than 400,000 people in the United States and many more abroad, so protection is warranted and needed.

Intellectual Property rights are often not treated as a top priority when running a business. This is a critical step that every business owner should closely examine. Failure to recognize IP rights can have steep repercussions for your business including financial and reputational damage. Violations can open doors to potential lawsuits with big price tags, civil damages, injunction, impoundments, lost profits and significant legal fees to attorneys for expensive litigation so avoiding infringement is critical.

The first step in protecting your intellectual property is recognizing one of the four types you might encounter:

1. **COPYRIGHTS** are original artistic works including music, literature, video, movie, architecture and computer software.

2. **TRADEMARKS** protect branding words like phrases, symbols, logos, goods, services and companies.

3. **PATENTS** cover inventions and rights to the invention for a predetermined time. These include utility, design and plant patents. The inventor's identity is secretive in nature until the patent is published.

4. **TRADE SECRETS** protect information of a proprietary nature which includes formulas, programs and data.

**WHAT SHOULD YOU DO TO PROTECT YOURSELF?**

Small businesses should begin by checking the United States Patent & Trademark Office databases to ensure a brand, logo, design or product name isn't registered. A few ways to avoid infringing is to:

1. Create original images or music,
2. Obtain licenses from the copyright holders
3. Use royalty free media to name a few

The Trade and Tariff Act of 1984 clarifies the conditions under which unfair trade cases under section 301 of the Trade Act of 1974 can be pursued. It was strengthened by the 1988 Omnibus Foreign Trade and Competitiveness Act.

Until all foreign leaders police this issue within their countries, the U.S. will continue to experience exorbitant loss on infringement in the U.S. and abroad.

LUIS A. RODRIGUEZ is a Client Service Representative at United Corporate Services, Inc. and a 2019 Top 50 winner of the Intellectual Property Rights (IPR Gorilla) Leader Award. Luis has over 20 years of Intellectual Property, Legalization, UCC and Corporate filing transactional experience. Says Luis: “I have a passion for providing co-workers and clients strategies that are insightful, impactful and informative.” Contact Luis at luis.rodriguez@unitedcorporate.com or through LinkedIn.

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Thanks to the US Trade Commission ID-14.
Work/Life Balance in a COVID-19 World

By Angela M. Vohsing, OSBA Certified Paralegal

Work/life balance. We've all heard about this elusive state of being, we know its importance, and we've heard all the tips and tricks for successfully striking that perfect balance. But in the face of a global pandemic, striking a positive work/life balance has become more important than ever.

In the paralegal world, we deal with a great deal of stress every day, such as managing a robust workload, juggling multiple projects all of which have competing demands and deadlines, keeping the client happy, supporting our attorneys, and dealing with difficult co-workers. Sometimes we're able to handle these demands with a calm exterior, appearing to be mild-mannered, cool, and collected. We smile and multitask, seemingly, without breaking a sweat, and they believe we can do it all, paralegals can handle any crisis with a smile. But let's be honest. There are days we feel more like a whirling dervish, a manic creature about to explode if they ask us to handle just one more "little" thing.

Paralegals manage an impressive amount of stress, and this list doesn't even take into consideration the stress of dealing with our personal lives. When we finally leave the office, we face the demands of managing relationships, managing a home, caring for children, and sometimes even caring for aging parents. Our evenings and weekends are full of shopping, preparing meals, washing and drying literally endless loads of laundry, helping with homework, and shuttling our children to multiple activities. We struggle to find the time to attend school functions, bake cupcakes for the bake sale, and host play dates. There never seem to be enough hours in the day!

Dealing with stress and achieving a good work/life balance is difficult in the usual scheme of things. It's a challenge we all face, and an even bigger challenge living in a global pandemic. Now, in addition to all the normal stress and demands on our time, we also have to deal with the added stress of the uncertainty brought into our lives by COVID-19.

The novel coronavirus originated in Wuhan, China in December 2019, and has rapidly spread throughout the world. On January 20, 2020, the first case of the novel coronavirus was confirmed in the United States. On January 30, 2020, the World Health Organization declared a global public-health emergency. On January 31, 2020, the United States declared a public-health emergency. On February 11, 2020, the virus was given a formal name – COVID-19. On February 21, 2020, the United States Centers for Disease Control announced that a pandemic was "likely," and on March 11, 2020, the World Health Organization declared a pandemic. Two days later, on March 13, 2020, the United States declared a national emergency, and it wouldn't be long before individual states began issuing stay at home orders. California was the first state to issue a stay at home order, on March 19, 2020. As of the time of this writing, all, but six states have issued orders requiring residents to remain at home for all, but essential activities, such as grocery shopping and seeking necessary medical treatment.

Non-essential businesses were required to close by the various stay at home orders issued by local governments with guidance from CDC. Essential businesses in general were limited to those that provide the necessities: grocery stores, distribution, and transportation of the products we need to survive. Other service providers were deemed essential, including legal services. But even though law firms have been allowed to continue operating, many have moved to remote operations. The work we do as paralegals became even more demanding as we learned how to navigate working remotely. Even though we're not working in our physical offices, we are striving to provide the same level of service to our clients, and our attorneys expect that work will be completed timely and with no less attention to detail as we would normally provide. We are rising to the task admirably, while stress levels have grown exponentially with the added stress of living in a pandemic.

Now, in addition to the usual demands on our time and attention, we may be stressed by the fear of an unknown future – when will life get back to normal, and what will the new "normal" look like? Schools and day care centers have been closed, and we have now been asked to homeschool our children. As many face increased concern about our health and personal well-being of our children and families’ safety, we worry about loved ones who are in care facilities that have restricted visitor guidelines. We are dealing with the challenges of attending to family needs while maintaining a work routine and finding a quiet place to participate in the many virtual meetings that have become the new norm. Yet, at the same time, we are perhaps dealing with the isolation of working outside the company of the attorneys.
and paralegals who are also “family.” We worry about a possible downturn in the legal industry that may lead to less work and declining billable hours, which could lead to possible job loss or reduction in hours. Some have been furloughed or had positions eliminated and are dealing with significant financial concerns.

Now more than ever, it is crucial to find the equilibrium between the demands of a professional and personal life. There are many ways to attain and maintain a positive work/life balance. The following are only a few of the many ways to balance the stress in our daily lives.

- Make health and well-being a priority. Follow a healthy diet, get enough sleep, and exercise on a regular basis.
- Be sure to understand the boundaries of your professional life. Leave work for normal business hours and resist the urge to check your email in the evenings and on weekends.
- Maintain a regular work schedule, even if you’re working remotely. Set the alarm clock, shower and dress for the day, eat a balanced breakfast and then fire up the laptop and begin the work day.
- Set goals, both personal and professional. Make sure your goals are realistic and measurable. If you have a goal that seems too big to accomplish, break it down into actionable steps in helping you achieve your goal. Give yourself a break when you have a setback. It happens to all of us, and a setback is not a failure, it’s merely a delay.
- Make time for yourself. Find a hobby or activity that you love and schedule time to devote to that hobby. Having a creative outlet allows you to express yourself and is unbelievably fulfilling.

Most of all, it is important to understand that a good work/life balance looks different to each of us. There is no one-size-fits-all, no road map that leads to balance. We each must look at our lives and determine what is important to us as an individual, and then find ways to make time for each of those priorities.

ANGELA M. VOHSING is a paralegal in the Employment Section of Eastman & Smith Ltd. She currently serves as Treasurer of PACO and has twenty five years experience as a paralegal.

What We Can Learn from the 1918 Pandemic

By John McNamara

The social impact of the Spanish Flu and Covid-19 are eerily similar. There are many things we can learn from the 1918 Pandemic’s impact on society, the economy and employee behaviors. Similar to Covid-19, businesses and schools were forced to close, social distancing was the new norm, economies took a terrible blow and production was slowed. One of the most important lessons we have learned from the Spanish Flu is that we cannot ease our guard too quickly.

In the summer of 1918, we thought we had conquered the pandemic; however, it lasted through the spring of 1919 because we underestimated its resistance.

WHAT CAN WE EXPECT AT THE CONCLUSION OF THE COVID-19 PANDEMIC?: There is no doubt that Covid-19 will be known as “the defining event of 2020.” The job growth of 22 million jobs, that we experienced in the US, over the past decade, has been lost due to Covid-19’s impact on businesses. Unemployment, during the first five weeks of the Covid-19 outbreak, has hit a staggering 22 million claims filed. If history repeats itself, the economy will come back strong, as was the case during the Roaring 20’s, when people felt liberated from isolation and did not shy away from spending.

As far as the societal and employment impact, this becomes a bit more complicated. Humankind is social by nature. Therefore, social distancing will be the short-term norm. However, as was the case 100 years ago, we have short memories when it comes to disasters or pandemics. Therefore, shopping malls,
movie theaters, large gatherings at bars, restaurants, sporting events, and the travel industry will take a short-term financial hit but will recover in time.

**Societal Impact:** There will be some long-lasting changes in societal norms. Open air parks will become a safe place to relax and enjoy the weather, rather than beaches and community pools. Shaking hands and hugging will become taboo out of fear. However, this too will be short lived. The more serious concerns are the impact of being unemployed, isolated from each other, the loneliness, despair, fear, anxiety, grief over the loss of loved ones, etc. These are all very real issues that most of our society is feeling.

When we hear about PTSD, we generally relate it to veterans of war. However, PTSD can also be the result of any kind of tragedy, including a Pandemic, such as Covid-19. PTSD will certainly be an issue that many Americans will be dealing with in the aftermath of this Pandemic. The severity of the PTSD is going to vary, based on the individual. Areas for concern with this terrible disease are an increase in alcohol and drug abuse, domestic violence, depression, homelessness, etc. Other societal issues that resemble what certain people and communities experienced during and after the 1918 Pandemic are discrimination, harassment, hatred, and violence against Asians. This is similar to what people of certain European and Mexican descents experienced 100 years ago.

The Global handling of the Covid-19 outbreak has been confronted differently by each country. Some countries were more aggressive in dealing with this silent enemy, some countries took a wait and see approach, others worked collaboratively with bordering countries. The result of these varying approaches has led to the possibility of a rise in Nationalism, as each country will inevitably take a look back and say, “we did it better and our way was correct.” Nationalism can have good and bad effects. Loyalty to one’s country is generally accepted as a good thing. However, it can also lead to societal competitiveness, which can result in the mindset that a country’s gains come at the expense of another nation’s expense and vice versa. We need to work together to get our borders reopened and our economy back on track. We cannot afford to begin competing against each other. This is not a Pandemic that is isolated to one location. Every country is in this fight together. One country’s problem will have a ripple effect on other surrounding countries. One state’s problem will have a ripple effect on surrounding states. Therefore, it is critical for all political and economic leaders to become more supportive and cooperative of our governments.

The most important takeaway from the 1918 Pandemic is that we cannot rush getting the country reopened. When we ignored the Social Distancing orders in the Summer of 1918, the Spanish Flu spiked again in the Fall of 1918. This spike lasted through the Spring of 1919, killing more people than all of World War I.

**Employee Impact:** It is my belief that employee behavior will change substantially. Employees are going to appreciate the employer that is transparent and consistent in their message, trust their employees and allow their employees to have a voice in reshaping the business. As I mentioned earlier, due to “layoffs” and “new employee expectations” there is going to be a large talent pool available to the companies that recognize and demonstrate the flexibility to adjust to the changing face of the corporate world and embrace employee loyalty. Employers that demonstrate they value their employees will “Win the Talent and Retention War.”

As we come out of this Pandemic, we need to recognize that flexibility and proactivity are critical in reinventing our organizations. The companies that are flexible and proactive will certainly be the leaders in their industry. One of the most critical steps in this reinvention will be the ability to be proactive in recruiting by capitalizing on the newly created talent pool. We must continue to recognize that “our most valuable assets are our people.” Recruiting and retaining the best of the best will make you the “best of the best!”

**Business Impact:** Global production has slowed, businesses have been forced to lay-off skilled workers, mom and pop businesses have been shuttered, and healthcare has been stretched beyond anything they have ever experienced. I can go on and on about the different business implications that we are facing, during and post the Covid-19 Pandemic. The smart and progressive business leaders today are looking ahead at how they can “reinvent their organizations.” Moving forward, businesses are probably going to transform the way they operate. Companies that are not focused on this new reality will likely lose their competitive advantage. There are several things that we have learned over the past five weeks. Mass layoffs of workers with critical skills have created a large pool of highly skilled individuals. The “new norm” includes working remotely, for a large part of the workforce, including virtual meetings. Virtual happy hours have become routine and a way to stay connected. Social Distancing has forced us to move to a remote workforce and technology has enabled us to continue to effectively conduct business. It has been reported by many organizations, that having certain employees and management working remotely has not had any negative impact on productivity. Some employees have reported that they feel able to better manage family/work balance.

There are other workers that have reported working remotely has been incredibly stressful and difficult. Humans are social and if you are a single individual that is being forced into isolation, including working remotely, it can be uncomfortable and stressful. However, most workers have reported that they feel more productive and welcome the experience. This is one major way for leaders to reshape their organization, moving forward. Companies need to realize that offering the ability to work remotely, whether it is one day or several days per week, becomes a huge “recruiting and retention tool.”
We need to recognize and adjust our thinking to the many changes occurring daily to the status quo. For example, staggering hours of operation and/or staggering employee schedules will be a short-term change that may prove so successful that it becomes permanent. Distance Learning may become a new approach to education, at least at the college level. In fact, some colleges and universities have already decided to conduct virtual courses for the Fall 2020 Semester. Telemedicine will be the new means of treating patients with certain conditions, including routine check-ups. Consumer behaviors are shifting to predominately online shopping with delivery and pick-up options. Shopping for the best deals will take priority over brand loyalty.

**ECONOMIC IMPACT:** In addition to this health crisis, we are facing an economic crisis that is impacting every sector of the global economy. We are confronted with a period of mass unemployment that is staggering. The only other time in history unemployment was this high was during the height of the Great Depression in 1933. This is going to lead to deep financial and psychological scars for the families trapped within it. It is especially overwhelming to the percentage of Americans that fall under the poverty threshold. Unfortunately, African Americans and Latinos, who make up over 38% of the US population, are under the poverty level. Covid-19 is devastating to minority and low-income communities at a scale that is completely out of proportion to their overall population.

The idea of Universal Basic Income, which was recently a political platform of Presidential Candidate Andrew Young, is again a topic of discussion to assist low income individuals. Universal Basic Income is a government guarantee that each citizen would receive a minimum income. It has been an on and off topic dating back to President Lyndon Johnson. In fact, there are many states and countries that have put experimental Guaranteed Income Programs in place. There is no question; something must be done to help our low income and uninsured individuals. If not, we will be
depthening the divide between this group and our middle and upper-income groups.

In summary, the world has grown in many ways over the past 100 years. We have made advancements in technology, science and medicine, as well as business infrastructure. However, there are so many similarities of the impacts of the 1918 and 2020 Pandemics. We need to recognize and learn from the effects of the 1918 Spanish Flu and how society was shaped post Pandemic. We must reimagine what society will look like when Covid-19 is under control and learn from how we confronted this silent enemy.

JOHN MCNAMARA

received his Bachelor of Science in psychology from Iona College. He currently focuses his expertise in Human Resource Support to numerous companies; Development of Policy and Procedure Manuals; Development of Employee Handbooks; Investigations of Employee Complaints; Employee/Management Sexual Harassment Awareness Training; Management; and Progressive Discipline Training.
A Paralegal’s Guide to Successfully Summarizing Medical Records

By Rochelle Arnold, CRP™

S.O.A.P.

Summarizing medical records for personal injury and medical malpractice cases can be both a daunting and rewarding task. To efficiently create medicolegal binders and summaries it takes a great deal of patience and attention to detail, along with exceptional organizational skills. One of the basic keys to successfully summarizing medical records is to follow the S.O.A.P. guidelines, which stands for the following: Subjective, Objective, Assessment, and Plan.

First, you want to review and sort all of your medical records. Sometimes the records will be available in hard copies and other times the records will be on a CD or electronically saved in your computer. If you are making up medical binders, you will want to print out the records and organize them. In most instances, the attorney will require them to be organized chronologically starting with the oldest date and working forward to the newest date. A medical record summary should be easy to understand and flow. Therefore, it is best to sort each record by provider and find all of the date of accident or date of loss records first. This will include reports from the first responders, i.e., paramedics and police officers. Next, you will locate all of the emergency department records from the hospital and begin summarizing.

ORGANIZE

When reviewing medical records, it is important to highlight patient name, date of service and name of provider. If there is more than one patient, it is imperative to identify each one individually before summarizing. This will help you to correctly separate the records and keep them in chronological order. Start with the subjective or the patient’s complaints section of the medical record, these are generally at the beginning of the medical report. You will find them often times under a subtitle, “History of Present Illness,” or HPI. You may also use abbreviations as much as possible as long as it makes sense. (S: for Subjective, O: for Objective, A: for Assessment and P: for Plan.)

SUMMARIZE

It is best to get familiar with the case before you begin summarizing. The key to becoming good at summarizing medical records is to organize your records in a way that is understandable and easy to read. You will become better at finding each criteria the more that you summarize. It is also very important to note any preexisting conditions or past surgeries which can be easily found in the record. If you are able to read the interrogatories beforehand, you will be better equipped to understand what the client is claiming in the way of a major injury or loss. Also, make a note of any records that are missing and might need to be ordered that would relate to the case.

The next step is to find the objective portion of the medical record, which would be the doctor’s findings, including examinations, MRIs and X-rays. It is wise to also include the name of the physician in this section. Then you will locate the assessment, which is the physician’s diagnosis, and this is very important. In conclusion, locate the plan portion of the medical record. The plan will state what the medical provider recommends as treatment options for the patient.
In conclusion, periodically proofreading your summary will ensure accuracy as you go along. Especially if you are using the dictate feature in Microsoft Word, you will likely have to go back and clean up the text. Summarizing medical records definitely requires perseverance, but with a little practice, patience and confidence you will be off and running to help your attorney in personal injury, medical malpractice, and wrongful death cases.

ROCHELLE ARNOLD, CRPTM has been a CORE Registered Paralegal with the NFPA since 2017. She has experience working as a litigation assistant, specializing in medical malpractice and wrongful death cases. She has also worked on the personal injury insurance defense side of the law.

**MEDICAL BILLS**

An Excel spreadsheet is the best way to keep track of the medical bills. I believe it is easiest to list the providers and number them. Under each provider you will list the date of service, amount billed, what insurance paid, what patient paid and how much was adjusted off, whether it be an insurance adjustment or a write-off. You will also need a balance column and a comments column on your Excel sheet. You can use your medical records summary as a reference to determine what services are related to the injury and which ones are not. If a service is not related to the case, then simply leave the row blank and make a note in the comment section.

**DICTATE**

One valuable trick to summarizing records is dictating the summaries. Setting up a microphone is very simple. You can use a USB microphone and plug it into your computer’s USB port, just like you would plug in any other added accessory. The microphone will need to be configured and that is easy as well. Just right click your sound icon at the bottom of your computer screen. Open sound settings and this will take you to another page. Find the sound control panel and click on this. Another dialog box will open which lists: playback, recording, sounds, and communications. Choose recording and then the configure button to get started using your microphone.

On the home tab of Microsoft Word to the far right, you will find a button titled dictate with a microphone icon. Simply click on the microphone icon and a red dot will appear, this indicates that the microphone is now on and ready to use. Speak slowly and clearly into the microphone and text will begin to appear in your Word document. This feature is great if you have an abundance of records to summarize and will save you time and energy from having to type them. Not only that, dictating is much faster than typing.

**Use Your Personal Brand to Strengthen Your Leadership Skills**

WHO YOU ARE, IS A STRONGER LEADER WITH YOUR PERSONAL BRAND

By Ronell B. Badua

In the last issue, we talked about building your personal brand. The idea that success comes from how you genuinely present yourself and your career as an individual is also known as personal branding. Since then, I hope you were encouraged to develop yourself. Many leaders talk about personal branding, but very few connect it to leadership which you need to hold yourself accountable to evolve.

What are your core values? If you can answer that question, you will have an easier time projecting them as a leader. Understanding your personal brand helps strengthen your leadership identity and your ability to value differences and enable the full potential of your clients, your employer, your team and most of all, yourself.

Find it in yourself to shine purposefully and align yourself with your brand by scheduling self-reflection time while you are focused and energized – alone. Odd, you might think, but a self-check-in will allow you to perform an internal audit about living up to your values, goals and choices you are making. This will provide you the opportunity to evaluate your decisions and aide you into the proper path.

Your leadership brand is crafted by the way you behave, react and interact cou-
pled with your effectiveness in how you consistently deliver. Branding your leadership is how your personal brand plays out in the social process of leadership in how you work with others to produce results.

Leadership teams need people with strong identities that provide clarity and understanding for what their leadership solves.

The last issue, we emphasized that people can sense inauthenticity. Lead authentically. Learn from others who inspire you and pick up skills along the way, just be authentic in your voice, opinions and the decisions. Read autobiographies of leaders who motivate you.

**CULTIVATE ROLE MODELS**

“Follow the leader.” Leaders who are ethical and are positive role models influence the behavior of others. Role models increase confidence and motivate while having a greater impact over time. Mentors play a powerful role in how leaders behave. In the last issue, you were asked who you would want to emulate. Get to know your role model(s) or observe them through social media and take note of their habits and how they present themselves. Role models help us rethink about our brand and goals. Behaviors demonstrated by role models, mirror those correlated with leadership effectiveness and greater engagement.

**PERSONAL CONNECTIONS**

You become more likable when you are focused on genuine and personable connections. Leadership teams are significant, not just successful. A successful team has a combination of skills, strengths and common trust. Find it in yourself to help each other truly find people’s capabilities and get the most out of each other. These connections also make you a respected leader.

**INNOVATION**

Leadership is the desire to be significant. Be your authentic self, courageous and vulnerable in everything you do, while being intimate in understanding others and what their brand represents (last issue, we encouraged you to establish 2-way networking to secure connections). This mentality compels the inner leader in you to develop a mindset that breaks from the status quo and identify a renewed way of defining an individual while sustaining professional relationships with a sustainable purpose and strategic focus.

**IMPACT**

Incorporating your personal brand with leadership can help you deepen your impact with interaction and relations with others, not just accomplishing work. Sustain partnerships and work effectively with others. The social process will help you execute work and create a leadership brand that others will talk about and remember.

**YOUR UNIQUE VALUE**

What differentiates you from other leaders? With your unique personal brand, people know what to expect from you. Your personal talents immediately come to the mind of others which in return adds value or provides more opportunities to the type of work you enjoy. Managing your leadership brand is powerful, articulates and cultivates the proactive way to perform and lead authentically.

Your personal brand coupled with your leadership style conveys your identity and distinctiveness as a leader. Commit to invest, develop and maintain great relationships to evolve your brand and build your leadership potential. Like social media, your personal brand is a journey of defining yourself as a leader and how this will inspire the manner in which you will serve others.

**Leadership Traits:**

Inspire – leaders are driven by passion.

Passion – love what you do because it is your way of life.

Stoicism – Train your mind to accept hardship, regulate unhelpful instinctual responses. Self-discipline.

Focus – complete critical things, develop incredible selective ignorance.

**CONFIDENCE**

- Create followership by having a clear vision, showing empathy and being a coach.

- Innovators – are leaders who solve challenges.

"Persistence beats resistance" – go beyond where others will stop.

"I AM ME. IN ALL THE WORLD, THERE IS NO ONE ELSE EXACTLY LIKE ME. EVERYTHING THAT COMES OUT OF ME IS AUTHENTICALLY MINE, BECAUSE I ALONE CHOSE IT."

- VIRGINIA SATIR

**RONELL B. BADUA** is a paralegal at the Department of the Corporation Counsel, City and County of Honolulu. He is NFPA’s VP and Director of Marketing.
We know that it is important to have hobbies, interests and outside activities to maintain a good professional and personal life balance. This article will feature three members of the Paralegal Association of Central Ohio (PACO) who share the hobbies and activities they enjoy to maintain a positive work/life balance.

**CONNIE FRENCH**

Connie French has been a paralegal at Sowald, Sowald, Anderson, Hawley & Johnson for 35 years! Here practice area includes family law and probate matters. She enjoys getting out of the office and going to the courthouse to conduct business most days. Connie and her husband have three adult children and two grandchildren, with number 3 due to arrive any time. Connie enjoys participating in PACO’s Pro Bono Wills Clinics, and her hobbies include participating in Bible studies, traveling, gardening, and walking.

During the pandemic, Connie has been working remotely just as so many of us have been. She also recently moved to working part-time status and enjoys having extra time to spend with family.

Connie has been volunteering at the Wills Clinics for some time now. She enjoys assisting our elderly clients and providing them with services they otherwise wouldn’t have the means to secure. It is so rewarding to provide the clients with all the end of life documents they will need as time goes on.

Connie attends a large church on the north side of Columbus that has approximately 5,000 congregants. On Thursdays, she participates in a small Bible study group, and twice a month she hosts a larger women's Bible study group in her home.

Connie and her husband enjoy traveling, and their favorite destinations include the American West. Her favorites are Glacier National Park, Yellowstone National Park, and Grand Teton National Park. She enjoyed traveling the Sun Road and seeing bears in Montana. Bison, elk, and Old Faithful made Yellowstone memorable.

Connie enjoys gardening and regularly tends her flower beds. She has some perennials in the flower bed but loves adding annuals for the colors they bring. Her color scheme is usually lavender, pink, and purple. She also enjoys having a hummingbird feeder and watching for hummingbirds to visit her garden.

Connie enjoys walking, either by herself or with friends. She walks in her neighborhood and in the local Metro Parks. She likes to walk not only for the exercise, but also for the chance to get outdoors with her headphones and music. Getting fresh air and sunshine are important to Connie, and walking gives her a chance to think and clear her head.

**NATASHA GATES**

Natasha Gates is a paralegal at Washington Prime Group, a national management group for retail properties. She
Natasha’s company is very supportive of its employees’ need to maintain a good work/life balance and does all it can to promote a healthy lifestyle. The company provides a bistro where beverages and fruit are always available as well as areas where employees can exercise while at work. For those employees who prefer working out at their local gym, the company provides a stipend to cover membership fees.

Natasha’s company has always been accommodating and during the COVID-19 crisis has been very concerned about the well-being of employees’ families and the lack of childcare for those with school age children. Most employees have been working from home during the pandemic.

Natasha’s hobbies are very hands-on. She enjoys crafts of nearly every kind, and recently had her basement remodeled to include a dedicated crafting space with lots of storage and plenty of workspace. She makes everything from lamps to dolls and from pillows to quilts. She makes handmade greeting cards and home interior items, and she paints and draws. Every year, she makes a vision board that helps her see and keep track of her goals and future projects.

At the beginning of the COVID-19 crisis, Natasha posted on Facebook that she had just bought a new sewing machine, and a friend asked if she could make masks. The project began and she has been making masks since. In two weeks, she made 375 masks. She has donated many masks to various assisted living and day care facilities.

Natasha grew up around resourceful women and learned to make her own clothing as a child. She attended the Art Institute of Pittsburgh and has a degree in fashion merchandising. When her daughter was young, she began designing dolls and clothes for her, and that hobby grew into a business – Natasha’s Doll Boutique.

KEMMILY KWOK

Kemmily Kwok is the Chair of PACO’s Programs Committee. She is a paralegal with Babin Law and is currently working in the area of mass torts and product liability. She has two children ages 8 and 11. The thing she likes most about her job is the positive work environment and work ethic of the firm; the thing she likes least is have many thousands of pages to review!

Kemmily prefers to work in the office, but her firm has always offered the flexibility of working from home when necessary. Since her children’s schools closed due to COVID-19, she has faced the challenge of trying to work from home while caring for her children and helping them with homeschool activities. Her firm is committed to allowing her to work from home as long as her children remain out of school. She’s attending lots of meetings by video conference and goes into the office about once a week to print and mail correspondence.

Kemmily Kwok

Kemmily enjoys hiking and belongs to a couple of different hiking groups. She loves hiking all over Central Ohio, but Yellow Springs, Mohican, Battelle Darby, and Prairie Oaks are her favorite hiking destinations. She enjoys being outdoors and socializing with the people in her hiking groups.

Kemmily has been writing poetry for about five years. She has always enjoyed writing and likes to incorporate nature into her work focusing on how nature affects people. She also writes about other topics and her writing can be introspective. Her poems are usually freestyle, rarely rhyming. She likes to attend open-mic nights around Columbus, mostly to listen to others’ work, but she also shares her poems.

Last year, she submitted her work and was selected to read her poetry at the Columbus Arts Festival. It was a really good experience, and her mom was really proud of her! She said it is difficult to get up in front of strangers and read her work, and she is always selective about the material she shares. She admires others who can memorize their poems, but she always has her work printed in front of her. One day, she hopes to submit her poetry for publication.

ANGELA M. VOHSING is a paralegal in the Employment Section of Eastman & Smith Ltd. She currently serves as Treasurer of PACO and has twenty-five years experience as a paralegal.
I have something perhaps shameful to admit. I'm a hyphen truther. For years, I've planted my flag staunchly in that side of an important debate that has ripped through legal technology for years: Do you spell e-discovery/eDiscovery with or without a hyphen? I've corrected articles to read “e-discovery,” have debated about how to capitalize it in headlines, and listened as my peers staunchly rebuked my hyphenated ways.

As it turns out, my preferred method may not be the industry's at large. In an informal poll I conducted via email and Twitter in April, more than half (54%) of 53 respondents said that “eDiscovery” was their preferred way to spell the term, compared with just 19% for the hyphenated version. An additional 27% said that it doesn't matter, because it's all “discovery” anyway!

This finding brought me great trauma; it was part of a public Relativity Fest panel last year where I planted my flag in the hyphen camp. Now though, I'm having second thoughts. Sitting next to me at that event was Kelly Twigger, principal at ESI Attorneys and a prominent writer on e-discovery, and she's declaring victory.

"I have used 'ediscovery' since I started doing this in 2004 and have held fast that it is the correct way. I am glad the industry has come around," she told me via email. "I write a lot and some editors change it (in my book the editor changes it to e-discovery despite my protests). I use eDiscovery when the word should be capitalized. I'm not sure I have a good reason as to why, it just makes sense to me that way. I go by gut."

But maybe it's time to get rid of the “e” altogether? David Horrigan, discovery counsel and legal education director at Relativity, told me that the discovery giant has the hyphen in its style guide. But that's not what has his attention. "However, we should all avoid redundancy in our writing," Horrigan argues. "Because almost all data are now electronic, can we finally just drop the ‘e’ altogether and go back to those glorious, bygone days of yesteryear when it was just ‘discovery’?"

Not so fast, Twigger said. "We are not quite there yet, so I don't agree that all discovery is electronic. Yet. We still do have paper, and lots of folks are still converting paper to electronic to deal with in discovery, particularly on the plaintiffs' side. That came up recently on one of Ari Kaplan’s virtual lunches, and there are many corporations with mounds of paper sitting at Iron Mountain and the like that has to be dealt with on some matters. I do agree that every case has ESI and therefore ediscovery, but we have to be careful to avoid just the defense perspective when looking at these issues industry-wide."

And still others took an alternative view. Befitting a retired federal judge, Andrew Peck, now a partner at DLA Piper, took a wider look at the problem—maybe the hyphen isn't the only issue? “Then there is the question of which letter is capitalized. Is it eDiscovery or Ediscovery? Or for that matter EDiscovery?” he asked.

Then, in a scary development, he put the onus on a certain editor: “Maybe it's time for some publication to have a style guide that answers this question. Not likely for The New York Times to step in, so I think you and LTN get to make the call.”

So if I'm going to make a call, I need hard data. Legal technology researcher and consultant Ari Kaplan is the man with the numbers: Kaplan has spent hundreds of hours over the past six years interviewing a range of leaders for research. His sixth annual E-Discovery Unfiltered report is due to be released shortly, and he is immersed in data about the sector.

And what deep insights did he find? "One of the key conclusions has been, among others, that well-intentioned, high-level, in-house professionals and their well-in-
formed law firm-counterparts agree to disagree on hyphenation,” Kaplan said.

Is that right? Well, then in my official determination … I’ll punt. I think that everyone should use what they’re comfortable with, even if it means I’m increasingly left alone on my hyphenated island.

10 Standards of Practice For Remote Ink-Signed Notarizations

By Bill Anderson

Updated 4-20-20. During the COVID-19 pandemic, several states issued temporary authorizations permitting Notaries to perform notarial acts on paper documents using video conference technology, a process Fannie Mae has labeled “remote ink-signed notarization” (RIN). As we will describe below, remote ink-signed notarization is not to be confused with remote online notarization (RON). New York issued the first authorization of this kind in an executive order on March 19, 2020. These authorizations have been issued to mitigate the public health risk of spreading the virus during face-to-face notarizations while at the same time allowing access to notarial services at a time when these services are greatly needed. The authorizations are temporary, typically lasting for the duration of the state of emergency declared by each state’s governor or for a certain specified time after the emergency is lifted.

TEMPORARY RIN VS. PERMANENT RON

The video conference notarization process permitted in many temporary state authorizations is quite different from the permanent remote online notarization (RON) laws enacted in 23 states to date. In general, RINs use solutions such as GoToMeeting, Microsoft Teams, WebEx, or Zoom to satisfy the requirement that a document signer personally appear before a Notary. The Notary verifies the identity
of the signer based on existing state Notary laws or by methods specified in the temporary order. Paper documents are signed in pen and ink and faxed or transmitted electronically between the signer and Notary.

RONs, by contrast, use a dedicated platform that integrates in one system a video conference capability, multi-factor methods for verifying the identity of the signer that uniquely apply to remote online notarizations, and an electronic signing room that presents the electronic document in real time for signing using electronic signatures by the document signer and Notary.

Many of the steps to perform a RIN in the temporary orders and authorizations are generally based on the New York executive order and are described below. These steps may vary for the specific temporary authorizations in other states.

- The Notary and signer appear before each other using a live, real-time video conference solution such as WebEx, GoToMeeting or Microsoft Teams.
- The Notary identifies the signer using the methods allowed under current Notary law.
- The signer signs the document and faxes or transmits electronically the signed document to the Notary during the video conference.
- The Notary prints out the document received from the signer and completes the notarial certificate in pen and ink during the video conference.
- The Notary faxes or transmits electronically the notarized document back to the signer during the video conference.

The New York order and several other state authorizations also allow the signer to physically mail the originally signed paper document to the Notary within a certain number of days of the RIN. When the Notary receives the document from the signer in the mail, the Notary is authorized to notarize that document using the date of the original RIN and mail it back to the signer.

**STANDARDS OF PROFESSIONAL PRACTICE**

While there is no doubt RINs meet a pressing need at a time as extraordinary as this, video conference notarizations are different from RON and the NNA believes additional mechanisms to ensure the security and integrity of these notarizations are needed. To that end, we have developed ten standards of practice for performing RINs.

Before following these standards, Notaries should confirm that their state authorizes these new types of notarizations. They should follow all requirements in the temporary authorization, state Notary laws, and any supplemental guidance that may have been issued by their commissioning officials. And, they must know the time frame in which they are authorized to perform these temporary notarizations and not forget the date of expiration of the temporary order. Finally, Notaries who perform loan signings should check with their contracting companies to see if they have received approval from the lender to perform the loan signing using RIN.

The ten standards of professional practice for video conference notarization or RIN are as follows:

1. The Notary should make a recording of the entire audiovisual conference, create a backup of the recording and, to protect the privacy of the signer, securely store both.
2. The Notary should record a journal entry of the notarial act and note in the journal that the notarization was performed using video conference technology.
3. The Notary should request the signer to show the front and back of any identification card used to verify the signer’s identity and carefully compare the information on the ID to the signer appearing on the video conference using an authoritative reference such as the 2020 NNA Keesing Documentchecker Guide.
4. The Notary should ask the signer to “pan” the room with the signer’s video camera so the Notary can see if there are any other persons in the room with the signer.
5. The Notary should ask the signer to state on camera that the signer is signing the document freely and voluntarily and has the mental capacity or competence to do so.
6. The Notary should ensure the angle of the video camera on the signer’s end allows the Notary to view the signer signing the document.
7. The Notary should require the signer to show each page of the signed document and the signer’s ID once again to compare the signatures on the ID and document before it is faxed or transmitted to the Notary.
8. The Notary should show the signer each page of the document to ensure it is the same document the signer transmitted.
9. The Notary should ensure the angle of the video camera on the Notary’s end allows the signer to view the Notary completing the certificate of notarial act.
10. The Notary should retain and, in order to protect the privacy of the signer, securely store the notarized document the Notary faxed or transmitted back to the signer on the date of the original video conference for comparison purposes if the signer requests the Notary to notarize the original signed paper document later, and destroy it immediately upon sending the original notarized paper document back to the signer.

**BILL ANDERSON** is Vice President of Government Affairs for the National Notary Association.
Thanks to advances in technology and a seemingly limitless number of real-time communication channels, the options for and success of remote working have exploded over the past five years. While some fields and professions have embraced these changes more than others (think engineering), professional service providers, including lawyers, haven’t been as quick to adopt remote working practices.

It should come as no surprise that the legal industry has been historically resistant to technological change—the field is highly personal and involves significant social interaction. However, just because working remotely doesn’t happen frequently doesn’t mean it can’t be done effectively. In this post, we’re sharing five tips for lawyers and law firms who engage in remote work, whether for the first time or as part of your regular routine.

**KEEP A STRUCTURED SCHEDULE**

Some people incorrectly believe that working from home opens the door to a work free-for-all, where schedules are long forgotten (as is the dress code). This is an easy assumption to make—you don’t have a commute to contend with, your work attire can likely be a bit more casual than usual, and you have the ability to work late into the night because your office is in your dining room. Why bother with a schedule?

However, keeping a regular schedule isn’t just good for your productivity; it’s good for your mental health and well-being, too. Keeping a structured work schedule will allow you to devote more focused time to executing necessary tasks. As much as possible, try to have your remote working habits and schedule mirror your in-office practice—your body and your brain are already trained to work this way, so don’t force them to make new habits.

Additionaly, maintaining a proper work-life balance is incredibly important for those working from home. You need to carve out time to physically and mentally unwind—if you keep working off and on well into the night, you never get a chance to recharge. So, as much as possible, set regular working hours for yourself, and when you’re able to wrap up work, close your laptop, leave the room, and truly relax.

**STAY CONNECTED WITH ESSENTIAL TOOLS AND SOFTWARE**

As mentioned above, the ability to work remotely is easier than ever before, thanks to the ever-increasing number of personal and collaborative productivity and practice management tools available to lawyers. In fact, many of these were created specifically to help law firms share documentation with colleagues and clients across great distances.

Before you start working from home or another remote location, make sure you have access to all the tools you need to conduct business away from the office and stay connected to colleagues and clients. This could include, but is certainly not limited to:

- Secure document sharing services
- Practice management tools
- Timekeeping and billing software
- Internal and external email accounts
- Internal communication channels (intranet, Slack, Skype, etc.)
- Company shared drives or file servers
- Secure document signing services
- Online notarization

If you look at the list above and realize that there’s something your office could benefit from, a remote work situation could be the perfect time to try it out. Most come with a minimum 30-day free trial so you can see how you and your colleagues adapt to the solution. Don't be scared off if this is something completely foreign—attorneys know better than most that discomfort breeds growth.

**LET YOUR CLIENTS PAY ONLINE**

Of course, one part of your job that you can’t forget about when working remotely is accepting client payments. Whether you need to replenish an evergreen re-
Online payment solutions have the benefit of letting you not only get paid from practically anywhere, but get paid significantly faster than traditional means. Before online payments, attorneys would generally send their invoices by mail. Factor in the time it takes for the mail to arrive, the client to write the check, send the check to the attorney, and then depositing the check after it arrives—you're looking at well over a week to get paid (if the check arrives at all). With an online payments solution, studies have shown that 85 percent of electronic invoices are paid the same week they are sent out, and as much as 57 percent of them are paid the same day they are sent to the client!

Not only that, but your clients will likely prefer being able to pay online. In our current “Age of Amazon,” clients are accustomed to paying for things online with just the click of a button, and paying for legal services is no different. In fact, letting your clients pay online is a huge convenience for them. Think of it: they don’t have to track down their checkbook, they don’t have to drive to your office, and they don’t even have to walk to the mailbox to pay their invoice. They can pay you from any internet-connected device, at any time. You’ll find that putting that power in their hands will not only breed good will from your clients, but also result in you getting paid faster and more reliably.

**UTILIZE MULTIPLE COMMUNICATION CHANNELS**

One common concern about working remotely is that, in the absence of a physical office, people may feel they are unable to have as productive of conversations or working sessions. The reality, however, is that there are a multitude of different options available to meet any specific type of call, conference, or working session. To maximize efficiency and productivity, we recommend familiarizing yourself with several different types of communication solutions, and utilizing them based on the unique factors present in a given interaction.

For simple conversations and link-sharing, you will likely find that the old staples of email or text messaging work just fine. If you’re looking for more real-time interaction, however, you might turn to one of the online communication tools referenced earlier, like Slack or Skype.

Want to see the person you’re talking to? No problem! Both Slack and Skype have video chat capabilities built in. Or, for a more formalized meeting, you can arrange a Google Hangout, a Zoom meeting, or an UberConference. All these solutions allow you to video chat, share screens, and type responses in real time, and can support large groups of attendees.

Of course, not every tool will be right for every interaction. But after using a few of them, you might find that your work becomes even more efficient and streamlined than when you relied only on in-person, in-office interactions.

A quick note on timeliness—just because you’re physically out of the office doesn’t mean you should be unreachable or out of pocket to your colleagues and clients. You should respond to emails, texts, and voice-mails with the same timeliness you would if you were sitting in your office. This will help ensure your productivity, and is another way to build good rapport between yourself, your colleagues, and your clients.

**TAKE CARE OF YOURSELF AND OTHERS**

Finally, whether you’re working remotely as a short-term necessity or as a permanent shift in your working habits, it’s important to remember to take care of yourself and others. As mentioned before, setting healthy work-life boundaries is essential to preserving your mental health and well-being, and creating a sustainable, longer-term working solution.

Carve out time to take care of your health needs, as well. Working from a desk in your home is no different from working at your desk in an office—you still need to take breaks, stand up and walk around, and give your eyes time to focus on something other than a computer or phone screen. Build these healthy personal habits into your daily routine, regardless of where you’re working.

Also, check in on your colleagues—especially if you’re all working remotely. Remote working can be isolating, and that environment can be difficult for some people to thrive in. These effects can be heightened if remote working is required for an indefinite period of time due to circumstances outside one’s control. As such, take note of your colleagues’ behavior and check in on them regularly. If you notice someone being more quiet or distant than normal, reach out for a quick non-work-related video chat just to see how they’re doing. Look for ways to maintain normal social habits, even if you’re not able to meet someone face-to-face.

Finally, enjoy the liberties that come with working remotely. Take comfort in the fact that you might get to work with your pet curled up in the corner of a room, or that you get extra time with your family at dinner because you don’t have to commute. While working from home certainly comes with its own host of challenges, it also brings a unique set of benefits. Appreciate these benefits, leverage the vast resources available to you, and embrace the experience.

**JORDAN TURK** is the Legal Content and Compliance Manager at LawPay, and is also a practicing attorney in Texas. She earned a B.A. in Classics, History, and Religious Studies from the University of Texas, and went on to earn her law degree from the University of Arkansas School of Law. Passionate about pro bono cases, Jordan was honored to be the recipient of the Harris County Bench Bar Pro Bono Award for Outstanding Service by an Individual in 2019.
The paralegal industry has changed over the years. With the changes of modern technology and changes in the economy, we have seen a growing number of paralegals start to offer Independent Contractor Paralegals services or Freelance Paralegals services. More law firms are considering the many benefits of working with a freelance paralegal as compared to hiring a full-time paralegal for their practice. However, what happens during a pandemic like the one we are currently experiencing now like the Coronavirus Pandemic? Throughout times like this a service stands out more than others and that is the “Virtual” Freelance Paralegal.

Virtual paralegal services are a growing service within the State of New Jersey. The services provided are virtual from inception when the first assignment is accepted through conclusion with the assignment has been completed. In 2020, the virtual paralegal work is made possible through the vast development and improvement of technology.

Specifically, WiFi access is essential to every virtual company. In addition, a lot of the assignments and meetings with the attorneys are done through video chat. This allows the paralegal to have the same face-to-face conversation with the attorney that would otherwise take place in an office setting. The paralegal also has the ability to contact the attorney with any questions via e-mail. Further, all draft documents can be sent via secure e-mail for the attorney’s review and consideration. Additionally, the use of websites like dropbox.com have allowed for the virtual paralegal and attorney to securely upload documents and work virtually together. This program allows for the creation of folders and revision of documents once they are created by the virtual users.

How may this all come in handy during a pandemic like the Coronavirus? Unfortunately, law practices have to make tough decisions during an outbreak of this nature. Many offices will have abbreviated hours, a lot of offices will be closed, and some attorneys will be forced to work from home. A virtual paralegal is prepared at all times to work from their home-based offices and can provide that virtual support that an attorney will need during such a crisis at a moments notice. Specifically, the virtual paralegal should have a fully stocked office with supplies including high speed printer, high volume scanner, and a reliable desktop computer or laptop. The virtual paralegal should also have secure email and specialty software if the area of law that they typically assist in requires same.

Some virtual freelance paralegals may be in higher demand than others. For example, attorneys in the trust and estate area and in the employment law area may be busier during the coronavirus outbreak and may need the virtual paralegal assistance. It is important that the virtual freelance paralegal offer assistance in multiple areas of law if possible.

The role of a virtual freelance paralegal has never been more important until now. The legal business is an important role in our community. As attorneys try and handle this coronavirus outbreak, it is the virtual paralegal who can provide the assistance and help they need to continue providing the service to their clients. As technology continues to grow, the virtual freelance paralegal role will become an even more important role in this legal industry.

MELISSA ACOSTA has been a paralegal for 20 years. She is the owner of Melissa Acosta Freelance Paralegal Services LLC www.njfreelanceparalegal.com and assists attorneys in NJ, NY and PA.
2020 NFPA Convention Preview: Paralegals Making a Splash in the Land of 10,000 Lakes

The Minnesota Paralegal Association remains excited to share Minnesota with you – virtually and in-person.

The MPA 2020 Convention Committee and NFPA are working on bringing you a great virtual Convention experience! We are working to provide our members and supporters throughout the country the opportunity to attend and participate in this event, despite COVID-19. We are still refining the details, but we will have meetings, networking, CLEs, workshops, and other traditional NFPA Convention events for members and sponsors. Some of the in-person events we’ve promoted, you’ll still get to attend, in the spring, during Joint Conference. Thanks to the Indiana Paralegal Association, the NFPA Board of Directors, MPA Convention Committee, and MHQ, Minnesota will host the 2021 Joint Conference, incorporating those great in-person convention events into Joint Conference!

MPA is still excited to share with you some of the exciting programming we’ll have for virtual convention and can’t wait to “see” everyone from the comfort of our living rooms.
Our Keynote Speaker, Justice Paul C. Thissen, was appointed to the Minnesota Supreme Court on May 14, 2018, by Governor Mark Dayton. Prior to serving on the Supreme Court, Justice Thissen was a Representative in the Minnesota House of Representatives from 2003-2018 and served as the Minnesota House Speaker from 2013-2015.

Justice Thissen will speak about Minnesota’s commitment to expanding access to justice for low- and modest-income Minnesotans. He will describe Minnesota’s proposed pilot project to allow legal paraprofessionals to provide limited legal advice to, and appear in court on behalf of, clients in eviction and family law cases; why Minnesota has taken this step; and the importance of paralegals in providing legal services.

CONTINUED LEGAL EDUCATION OVERVIEW

CLE is pending NFPA approval at the writing of this article.

Software: What to use and when to use them (CLE)
Bill Mayleben, Digital Litigation Solutions
- Learn the differences and benefits of various presentation software’s for the courtroom. Whether it’s PowerPoint, Trial Director, On-Cue, Prezi, Acrobat, or VR, Bill will demonstrate their capabilities and how to use them.

True Due Diligence for Paralegals: Insights from the Trenches (CLE)
Ryan Baker and Mandy Dietz, Capitol Lien
- Enjoy war stories and insights shared from decades of research. Everything from Property and Corporate related issues to the elusive UCC will be tackled in this session to assist Paralegals

Messy Conversations about Implicit and Explicit Bias (Diversity, Inclusion, & Equity CLE)
Dr. Raj, Associate Professor at Metropolitan State University
- Using the circle process, participants will work to examine the current state of affairs in relation to equity and leadership, as well as challenges to equity, ethics, and race in our communities and in the media.

Meet and Confer Checklist (CLE)
Heidi Fessler, Innova Law Group
- This presentation will cover the information you need to have at hand to successfully represent your client and the Meet and Confer Conference.

Supply Chain Contracting 101 (CLE)
Jennifer Arbuckle, Thomson Reuters
- Learn the most important considerations in technology supply chain contracting, including important clauses; negotiation leverage, dynamics and strategies.

Immigration Law – Overview and Landscape Since 2017 (CLE)
Jennifer Mojica, Fredrikson & Byron
- Jennifer will discuss administrative and adjudicative changes over last few years, administratively and adjudicatively, and look forward to 2021 and beyond.

Millennials and Gen-Xers On Your Jury
Adam Bloomberg, Adam Wirtzfeld and John Ilg, Litigation Insights
- Understanding multi-generation jurors and what visuals speak to them. Participants will learn about these generational differences and how to take them into account when preparing for trial.

Easiest Catch Don’t be Another Fish in the Dark ‘Net (CLE)
Mark Lanterman, Computer Forensics Services
- Current developments in the digital underground as well as realistic advice for cyber protection. Mark will discuss particularly dangerous types of threats that might affect individuals involving the Dark Web, the Internet of Things, phishing, and Wi-Fi attacks

Ethical Issues Affecting Paralegals (Ethics CLE)
Michael Flom, Lathrop GPM
- This session will cover ethical standards and procedures that paralegals regularly face. We will use hypotheticals and real-world examples to address the ethical challenges that are encountered daily in the legal environment.

Communicating in the Shadows: What You Need to Know About the Messaging Applications Used by Bad Actors (CLE)
Rene Novoa, Joseph Pochron & Kimberly Quan
- Consumers have a wide variety of mobile messaging platforms that they can freely use on a daily basis. This session will discuss the contemporary landscape, available workflows and ongoing issues and implications to consider moving forward for legal professionals. In the collection and analysis of data from these sources.
Ethical Considerations for Paralegal Practice (Ethics CLE)
Panel Discussion, Members of the Minnesota Supreme Court authorized Paraprofessional Practice Pilot Project Implementation Committee

- A panel discussion on appropriate supervision, unauthorized practice of law, malpractice liability, and how Minnesota’s proposal compares to other states taking similar action to expand the role of paralegals in the delivery of legal services.

Settling the Matter: Uses and Benefits of ADR and the Mediation Process (CLE)
Sharon Press, Mitchell Hamline School of Law

- In this session, participants will learn about mediation – what it is and how it can be used in a variety of cases. The session will start with an overview of the various ADR processes and when one might use each, with a special focus on mediation.

Overdose Prevention, Recognition and Response (Diversity, Inclusion, & Equity CLE)
Stephanie Devich, Valhalla Place

- The presentation will discuss terminology, overdose trends, overdoses prevention and risk factors, recognizing an overdose, and responding to an overdose. Additionally, attendees will receive training on Naloxone and a look at some of the laws related to carrying Naloxone.

Patent Trolls and Recent Developments in the Supreme Court (CLE)
Terrance Newby, Maslon LLP

- Recent developments in intellectual property law that will affect business owners and legal professionals. These topics include recent Supreme Court decisions concerning patents; the effect that non-practicing entities, also known as “patent trolls” have had on the legal landscape; and two recent Supreme Court cases concerning trademarks that will fundamentally alter years of established trademark practice.

Securities 2020 (CLE)
Zach Robins, Messerli and Kramer

- This presentation discuss recent changes to federal securities laws. Particular attention will be paid to Reg D, Reg CF, and Reg A. Additionally, developments in new and evolving areas of law including cryptocurrency and securities token as well as investment crowdfunding, will be covered.

A New Beginning: The Target Journey Towards Brand Evolution (CLE)
Stephen Lee, Target Corporation

- Discover how the Target’s IP team has evolved their brand protection strategy in line with the company’s overall strategy of expanding its owned brand offerings.

WORKSHOPS

Workshops are free for NFPA members to attend!

Making the Transition from Private Practice to Corporate Legal Department (Workshop)
Carl Morrison, The Cosmopolitan of Las Vegas

- This session will cover the pros and cons of making such a career shift, what paralegals considering such a move can do now to prepare, tips and tricks for making the transition more smoothly, and enjoying and surviving the corporate life.

Preparing for your Paralegal Career (Student Workshop)
DeAnne Brooks, DI Recruiting LLC

- Learn how to update your resume, where to apply, how to interview, and how to land your first paralegal job.

CONVENTION CHARITY

We are pleased to announce that our 2020 Convention charity is Friends of the Boundary Waters Wilderness (FBWW). The Friends of the Boundary Waters Wilderness is a non-profit organization formed in May 1976, with a mission to “To protect, preserve and restore the wilderness character of the Boundary Waters Canoe Area Wilderness and the Quetico-Superior Ecosystem.”

The Boundary Waters contains more than 2,000 backcountry campsites, 1,200 miles of canoe routes, 12 different hiking trails, and is popular for canoeing, canoe touring, fishing, backpacking,
dog sledding, and enjoying the area’s remote wilderness character. The Boundary Waters attracts over 150,000 visitors per year to Northeast Minnesota.

The Friends have played a pivotal role in maintaining the wilderness by advocacy and litigation and increasing the size of the wilderness area and limiting motor usage in accordance with the Wilderness Act. It has also had a major role in establishing the nation’s first acid rain laws to protect Minnesota’s aquatic ecosystems, increased buffer zones for aircraft flying over wilderness areas, and raised public awareness on the issues surrounding copper-nickel and other non-taconite mining and logging near the wilderness area.

WRAPPING UP

Minnesota absolutely cannot wait for our friends and colleagues to “join us” virtually in October for what is sure to be a memorable NFPA convention! If you have any questions, please feel free to reach out to nfpa@mnparalegals.org, and we’ll be happy to help you.

The MPA Convention Marketing Committee consists of:

- Matt Regan, MnCP, MPA Director of Marketing
- Maren Schroeder, RP, MnCP, MPA NFPA Primary
- Jamie Holzer, MnCP, MPA NFPA Secondary
- Katie Burns, MPA Social Media Coordinator.

REGISTRATION WILL OPEN SOON FOR THE 2020 ANNUAL CONFERENCE VIRTUAL EVENT!
PLEASE WATCH FOR ANNOUNCEMENTS BY EMAIL OR ON THE NFPA WEBSITE: WWW.PARALEGALS.ORG

NEW Affiliate Membership
For Aspiring Managers

Who Qualifies for Affiliate Membership

Affiliate members are case managers, senior paralegals, litigation support analysts or senior docketing personnel aspiring to become managers. Affiliate members must have two or fewer duties listed on the IPMA membership application. You can find the membership qualifications here: www.theipma.org/membership_qualifications

Let the IPMA help elevate your career

Affiliate Member Benefits

- Learn the ins and outs of management in the legal industry
- Participate in live webinars and have access to dozens of recorded sessions
- Network with industry leaders and connect with other aspiring managers
- Receive a discount on IPMA’s Conference and Managerial Skills Seminar
- Have access to unlimited online managerial resources such as core competencies and job descriptions
- Utilize the mentor program and learn from managers all over North America

theipma.org • info@theipma.org • 404-467-6757
**Board Spotlight**

**Lisa Lynch, CRP™, CEDS**  
Dallas Area Paralegal Association  
Region II Director, Chair of the Region Directors

**WHAT IS YOUR TOP GOAL DURING YOUR TENURE AS A REGION DIRECTOR?**

My goal while being RD was to connect with all of the local associations in my Region. I wanted to meet as many local leaders as possible and learn their pain points and assist in any way possible.

**WHAT DO YOU ENJOY MOST ABOUT VOLUNTEERING ON THE NFPA BOARD?**

I love the relationships that I’ve gained over the years with board members and local leaders. I love the diverse perspectives of NFPA. It has provided me with a global perspective instead of a local perspective. I love being a part of something bigger and assisting to effect change.

**WHAT ADVICE WOULD YOU GIVE SOMEONE WHO WANTS TO PURSUE A LEADERSHIP ROLE?**

My advice to anyone wanting to step into a leadership role of any kind is if you are passionate about it, you feel like you have something to bring to the role and you have the time to commit to the role, GO FOR IT! Do not let the possibility of failure keep you from going for it!!

**WHAT IS THE COOLEST TREND YOU SEE TODAY (IN THE LEGAL FIELD)?**

I love seeing that ediscovery is bleeding over into the mainstream. It can be used to data map a company and to assist with data retention. I also love how far Artificial Intelligence has come and all the new things that are beginning to happen with it.

**IF I WEREN’T A PARALEGAL, I WOULD BE...**

a doctor or an interior designer.

**FINISH THIS SENTENCE: A PARALEGAL IS...**

indispensable.
Region Spotlight

Angela Scarpa
Massachusetts Paralegal Association

HOW HAS BEING AN NFPA MEMBER BENEFITTED YOU PROFESSIONALLY?

Networking and friendships. I have been the NFPA representative for my local association for a few years and I’ve met a lot of people and became friends with many of them. When you associate with others in your field, you naturally become a better at what you do. Suddenly you have all these people that you can bounce things off which helps you to excel.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?

Networking. I cannot stress that enough and here’s why. I was laid off late last year. I put it out there to my local board and a few members that I am close with that I was on the market. I had a new job within three weeks! I am certain that if I had not made good connections along the way, my job search would have taken much longer than it did. I switched gears slightly from what I had been doing, but I ended up in a place where I love to go to daily.

I BECAME A PARALEGAL BECAUSE...

I used to love all the legal shows when I was a kid. I started working for a law firm as a secretary in 1998. Later that year was moved to the real estate department and fell in love with title work. Twenty-two years later, I still love it.

WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?

Was getting hired instantly at the first form I worked for. I had no experience whatsoever, I remember one of the partners saying, “she’s the one” near the end of my interview. Fast forward to a few months ago when I ran into those partners at an event. One of them pulled me aside and told me that he was very proud of what I have accomplished. I still bust out a grin from ear to ear when I think about that moment.

WHAT ADVICE WOULD YOU GIVE AN ASPIRING PARALEGAL?

Cease any opportunity you can to learn a new skill or improve an old skill.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?

We are in contact with clients during some of the most stressful times in their lives. I think the most valuable thing we can give a client, is reassurance that we are there to help the attorney help them. A warm smile and a word of encouragement can go a long way for a client.

IF I WEREN’T A PARALEGAL, I WOULD BE...

doing something I didn’t love.

A PARALEGAL IS...

an invaluable resource to any law firm or company.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?

Becoming paperless. I still love my paper, so I am still a work in progress. But I love the idea of having a paper free desk. Someday.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?

Becoming paperless. I still love my paper, so I am still a work in progress. But I love the idea of having a paper free desk. Someday.
Maren Schroeder, RP®, MnCP
Minnesota Paralegal Association

**HOW HAS BEING AN NFPA MEMBER BENEFITTED YOU PERSONALLY/PROFESSIONALLY?**

NFPA has given me a great network to tap on when I run into things, I’m not familiar with. It’s also given me the confidence to branch out of my “comfort” zone with my work, through friendships that always encourage personal and professional growth.

**WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?**

I love the opportunity to have a voice as a member of the paralegal profession. In 2019, I was appointed as MPA’s representative to a judicial committee establishing a Paraprofessional Practice Pilot Program in Minnesota – an opportunity I wouldn’t have if I weren’t involved in my local association. I also think it’s important that NFPA is working on real issues affecting society, such as access to justice and consumer protection in the context of the unauthorized practice of law.

**WHAT IS A TYPICAL WORK DAY LIKE FOR YOU?**

I am a freelance paralegal and do political and policy consulting, as well as lobbying for a non-profit. When Minnesota’s legislature isn’t in session, I am typically working on client matters ranging from medical cannabis patient protections to law office procedures, or researching policies implemented by other states that I can extrapolate to Minnesota. Recently, I picked up a gig doing political consulting and campaign finance compliance, so I have been doing a lot of data entry and mailers.

Leading up to and during the legislative session, I spend a lot of time on conference calls, in meetings, or working in the halls of our State Capitol. Working on the legislative side of things is completely different, because I’m effectively doing the work of a paralegal, without direct attorney supervision, but always subject to legislative counsel review prior to language I’ve worked on being.

**WHAT HAS BEEN YOUR FAVORITE/MEMORABLE MOMENT OF YOUR CAREER SO FAR?**

Passing my first piece of legislation making a modification to Minnesota’s medical cannabis program, making it easier for patients to have caregivers. We worked on this modest, but important, change over two years, and it was adopted in a conference committee report and signed into law in May 2019.

**WHAT ADVICE WOULD YOU GIVE AN ASPIRING PARALEGAL?**

Paralegals can do anything (but practice law). Step outside of the law firm mindset and think about what you’d like to do and use your local paralegal association to find a mentor who can encourage your professional growth.

The paralegal field is rapidly expanding, and the opportunities are endless.

**WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?**

The expanding role of paralegals, both through non-traditional roles and expanded scope of work. Regulation is around the corner, and it will be interesting to see how the profession evolves over the next 5-10 years.

**WHAT I KNOW NOW THAT I WISH I’D KNOW THEN?**

I spent a number of years working as a traditional law firm paralegal and hated every minute of it; there was no work-life balance. I wish I’d had the confidence to branch out on my own doing freelance work, and that my skills were transferable outside of the provision of legal services. I really love what I do now, but I wish I’d started sooner diversifying my workload.

**IF I WEREN’T A PARALEGAL, I WOULD BE . . .**

A web developer or graphic designer. In my “spare time” I’ve taught myself how to design and build websites, and how to use graphic design software. I do most of the web and graphic work for non-profits I’m involved with.

**ON SUNDAY AFTERNOONS, YOU CAN USUALLY FIND ME . . .**

Watching the Green Bay Packers! When it’s not football season, its usually warmer, so I try to spend Sundays working in my gardens. I recently branched out from flowers to a large-ish vegetable garden, so I keep myself pretty busy when its not football season.
Rhonda Smith Harrigan
Sacramento Valley Paralegal Association

WHAT IS A TYPICAL WORK DAY LIKE FOR YOU?
As a Legal Document Assistant, I have a different work day than paralegals in a law office because I don’t work for an attorney. I meet with clients who are self-represented and assist them with their legal documents. There is no ‘typical’ day because I can be assisting with divorce documents and then an hour later helping someone draft their estate plan, and later assist with filling out an application for a conservatorship or guardianship. I love that no two days are the same.

WHAT IS YOUR FAVORITE PART ABOUT BEING A PARALEGAL?
My favorite part of being a paralegal is helping people who are scared and are intimidated by the legal process. I am grateful to have the education and experience to walk them through the documents and legal process to get their situation resolved.

WHAT ADVICE WOULD YOU GIVE AN ASPIRING PARALEGAL?
I would advise any aspiring paralegal to join your local and national paralegal associations, and to volunteer with legal clinics, CASA, County Bar Assn, etc.. Volunteering can give you great hands-on experience in the legal field and access to attorneys who might be looking to hire.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?
I am so excited by the trend of licensing non-attorney legal technicians (para-legals) to assist and advise the public in limited areas of law. This is a huge step forward in bringing affordable access to justice to all. I look forward to seeing how it will grow in the future.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?
Paralegals enhance the access to justice by performing substantive legal work at a lower billing rate than an attorney, thus providing more affordable legal services to the client.

IF I WEREN’T A PARALEGAL, I WOULD BE . . .
I would own a doggie day care.

A PARALEGAL IS . . .
Someone who works behind the scenes to make things happen. They keep everything running and are the backbone of the law office.

WHAT DO YOU ENJOY THE MOST ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?
I appreciate most that I have a plethora of paralegals that I can call for assistance in areas that I am less knowledgeable. I find that paralegals are very generous with their knowledge and experience and eager to help others.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?
One of the most important is the education opportunities offered by NFPA in the form of the National Paralegal Reporter magazine and MCLE (minimum continuing legal education) webinars. Convention is also a huge opportunity for education, networking and making life long friendships with paralegals from all over the country.
HOW HAS BEING AN NFPA MEMBER BENEFITTED YOU PROFESSIONALLY?

It has facilitated connections with paralegals across the country, whom I contact often for information when working on cases in their cities and states. Being able to tell any of my attorneys, “Oh! I know someone in that jurisdiction who can provide the resources we need for this case” is a great asset and reflects positively on my resourcefulness and abilities.

WHAT DO YOU ENJOY THE Most ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?

The great friendships and serving the Central Ohio community with other like-minded paralegals.

WHAT IS A TYPICAL WORK DAY LIKE FOR YOU?

Busy with a many different tasks that are never boring! I may prepare responses to a set of discovery requests, or prepare documents for production in another case, research statutes and communicate with government officials, construct a PowerPoint presentation for a partner, prepare subpoenas and arrange for a process server to effect service, prepare and file real estate documents with a county recorder, or check case law and citations for an appellate brief. I enjoy the variety.

WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?

Having the opportunity to coordinate pro bono legal clinics, especially our Wills Clinics. It is incredible to provide legal services to low-income individuals that they would not otherwise receive. It is equally rewarding to volunteer with other legal professionals.

WHAT ADVICE WOULD YOU GIVE AN ASPIRING PARALEGAL?

Always have a can-do attitude and be willing to step out of your comfort zone. Don’t be afraid to try something you’ve never done before. Be willing to accept an opportunity, even if it isn’t in an area of law that you are interested in.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?

Because of the current COVID-19 pandemic, it is the ability to work remotely from home, which will likely become a common option in law office employment.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?

Paralegals are helpers. They are able to gain the trust of clients and attorneys alike, making encounters less intimidating for clients who aren’t familiar with legal procedures. Paralegals are especially important in pro bono clinic settings, assisting people to obtain legal counsel and helping them to feel comfortable doing so.

IF I COULD NAME THE AUTOBIOGRAPHY OF MY LIFE, IT WOULD READ . .

Getting Things Done – Why My Passion is To Serve Others

IF I WEREN’T A PARALEGAL, I WOULD BE . .

Asleep.
HOW HAS BEING AN NFPA MEMBER BENEFITTED YOU PROFESSIONALLY?

Being exposed to the progress of the paralegal profession.

WHAT DO YOU ENJOY THE MOST ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?

Being able to shape the mission and purpose of PANV.

I BECAME A PARALEGAL BECAUSE...

I enjoy studying the law and applying the specific facts of a problem or issue to the law in resolving the problem or issue.

WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?

Passing the PACE.

WHAT ADVICE WOULD YOU GIVE A STRESSED-OUT PARALEGAL?

Stop. Take a deep breath and know that you will do the best that you can. More importantly, remember why you chose the paralegal profession.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?

Watching various states take steps towards regulation. Regulation is coming because paralegals are extremely important to the legal profession; in other words, the legal field could, and would, not survive without paralegals. Watch out Virginia!

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?

I have worked in-house with large corporations, federal government, and nonprofits and no matter the type of the employer – rich or not rich – paralegals are intricately involved and needed by these employers.

IF I COULD NAME THE AUTOBIOGRAPHY OF MY LIFE, IT WOULD READ . . .

that she did what made her happy and that was being a crazy, busy, essential, and valued paralegal.

IF I WEREN’T A PARALEGAL, I WOULD BE . . .

a writer.

Kathi P. Ingram, RP®
Paralegal Association of Northern Virginia (PANV)

NFP A and Drexel University Online are excited to announce an exclusive educational partnership.

Under the agreement, NFPA members and their immediate family members are eligible for a 10-40% tuition savings on over 150 online certificate and degree programs, with no application fee. Drexel offers multiple online bachelor’s degrees in business, criminal justice, education and more.

A variety of online graduate degrees and certificates are also available such as a Master of Legal Studies with concentrations in Cybersecurity and Information Privacy Compliance, Financial Regulatory Compliance, Health Care Compliance and Human Resources Compliance. Other available programs include a Graduate Certificate in Pharmaceutical and Medical Device Regulatory Compliance, Collaborative Special Education Law and Process Certificate, MBA, MS in Human Resource Development and many more.

For additional information visit your partner page at Online. Drexel.Edu/NFPA.
NFPA IN-HOUSE PARALEGAL COMMITTEE

How to Start an In-House Paralegal Section Within your Local Association

By Renee De La Cruz, ILAP and Christine Hansen, ILAP

NFPA In-House Paralegal Committee encourages local paralegal associations to establish an In-House Paralegal Section, affording their members working in a non-law firm environment the opportunity to network and discuss the challenges of working in an in-house legal department.

In-House Paralegals work in a legal department setting within business entities, not-for-profit organizations, and government agencies. Their responsibilities differ from their counterparts working in law firms in that they often have more day-to-day contact with clients, work more independently on administrative (non-legal) tasks, and are given additional input and participation in the matters they are working on. In-House Paralegals work in a variety of specialties including litigation, corporate, real estate, intellectual property, labor and employment, and benefits, to name a few.

One great example of an In-House paralegal is the Illinois Paralegal Association (IPA). With the enthusiastic support of IPA’s Board of Directors, IPA members and past presidents Christine Hansen and Colette Lemke formed an In-House Paralegal Section in 2010, creating a forum for paralegals working in an in-house setting. The name “In-House Paralegal Section” was chosen to avoid any confusion with the corporate specialty section, as this area of law isn’t exclusively practiced by in-house paralegals. Meetings are held via free teleconference, and participation is strictly for In-house paralegals in order to honor their employers’ code of ethics. Topics have ranged from attorney-client and work product privilege, legal holds, antitrust, corporate compliance, technology, insurance, partnering with in-house clients, and exempt/non-exempt issues.

The goal of NFPA’s In-House Paralegal Committee is to enable paralegals working in an in-house setting to network with each other regardless of geographic location, while also sharing resources and providing education by means of seminars/webinars.

Please reach out to us if you have any questions or resources to share. There is a strong need for In-House Paralegals, so get your In-House Section started today! Look for the NFPA In-House Paralegal Committee to share additional information throughout the year to empower your local state association to meet the specific needs of this paralegal specialty (In-House Paralegals).
Most of you are familiar with the Paralegal Association of Central Ohio’s (PACO) Pro Bono Committee and the success of its Wills Clinic program that was launched in collaboration with the Legal Aid Society of Columbus in 2010. PACO’s Pro Bono Committee has received local and national recognition for its exceptional efforts and accomplishments in bringing its services to low-income senior citizens throughout Central Ohio and also in other areas of the state. Since 2010, we have conducted 142 Wills Clinics and served 1,262 senior citizens, all staffed by volunteers from PACO, local attorneys, and law and paralegal students.

In support of our efforts, two local law firms, Porter Wright Morris & Arthur, and Ice Miller, gifted us with laptop computers that they had decommissioned in 2011 and 2016, respectively. We are eternally grateful for these critical provisions, and we have used these laptops extensively at all of our Wills Clinic events. Gradually through the years, many of the laptops have failed due to wear and tear.

Last year, PACO was notified that we had been nominated to receive a grant that would enable us to purchase new equipment for use at the Wills Clinics. We are excited to announce that PACO’s Pro Bono Committee was selected by the ORIX Foundation as the recipient of this grant, and recently received a generous $5,000 contribution!!! These monies will allow us to purchase needed new laptop computers and printers.

The ORIX Foundation is a charitable foundation sponsored and managed by ORIX USA Corporation and its employees to advance education, strengthen communities and improve lives. The foundation awards direct grants to not-for-profit organizations and matches the charitable contributions and fundraising of each ORIX USA employee up to $5,000 each year. Since it was founded in 2009, ORIX Foundation has committed over $20 million to nonprofit organizations primarily in ORIX USA’s headquarters region of North Texas. For information, visit www.orixfoundation.org.

Our deepest gratitude and thanks to the ORIX Foundation!!! Our thanks too, to Nicole Root, who nominated PACO’s Pro Bono Committee for this grant. During Nicole’s law school education at Capital University Law School, she worked full-time at ORIX Real Estate Capital and she volunteered regularly at our Wills Clinics so she is personally familiar with the services we provide and the foundation from whom this grant has been given. Nicole graduated from Capital in May 2019, passed the bar exam, was sworn in as a licensed attorney in November 2019, and continues in her employment with ORIX Real Estate Capital as a Staff Attorney. We are so appreciative to Nicole, and to the ORIX Foundation!!!

TERESA SCHARF is an OSBA Certified Paralegal with over fifteen years of experience as a litigation paralegal and over twenty-five years in the legal services profession.
As most of you are aware, as of Monday, April 27th, the NFPA Board suspended the normal certification, renewal and CLE processes and fees. The Board then initiated the Certification FastTrack Pilot Program to assist our members and credentialed paralegals in this uncertain time. The FastTrack Program was created from a collaborative process of a Board Member Task Force.

For the next six months, this unique pilot program will streamline the reviews of PACE and PCCE applications and renewal applications; eliminate many of the cumbersome, antiquated and confusing document requirements; and reduce a number of certification fees.

The Task Force will perform a review and re-evaluation of the program in six months. Staff will be tracking and reporting of issues discovered during the pilot time frame.

**NFPA FASTTRACK PROCEDURES.**

**CERTIFICATION – FASTTRACK FEES**

- PACE® & PCCE® Application Fees reduced to $250
- PACE® & PCCE® Reapplication/Retest Fees reduced to $150
- PACE® & PCCE® Renewal Fee reduced to $50
- 60 Day Extension or Retroactive Extension fee reduced to $15
- Suspension of the $25 processing fee

**PACE® AND PCCE® APPLICATION INFORMATION**

Completed and Executed Application, which includes applicant’s agreement to each of the following:

- Applicant Attestation
- Confidentiality Agreement
- Limited License to Use NFPA Credentials Agreement
- $250 Application Fee or $150 Reapplication Fee (if reapplying within two years from original application date)
  
  *Note: no additional documentation is required with a re-application.

- Letter from Attorney/Employer verifying Substantive Paralegal Experience (if eligibility relies on paralegal experience) – Substantive paralegal experience is defined below. Sample letter template can be found here.

- Copy of Education Transcripts (if eligibility relies on education)
- Copy of DD214 or equivalent (if eligibility relies on military service)
- Paralegal Certificate (from an ABA-approved paralegal or LLLT program or AAfPE member program. See below for certificate programs accepted).
- Sufficient CLE Certificates meeting NFPA guidelines to satisfy the eligibility pathway requirement (see CLE section below for CLE guidelines).

NO REFUNDS will be provided on any application or fee except in the case of an error on the part of NFPA in accounting or administrative processing.

**CERTIFICATE PROGRAMS ACCEPTED**

- ABA-approved paralegal or LLLT programs
- AAfPE-member paralegal programs

**SUBSTANTIVE PARALEGAL EXPERIENCE**

"Minimum work experience" is defined as full-time employment performing the duties of a paralegal at least 80% of the time. Part-time employment is calculated on a pro-rata basis.

"Substantive Paralegal Experience" is defined as the performance of substantive legal work that requires knowledge of legal concepts and is customarily, but not exclusively, performed by a lawyer. The paralegal may be contracted with or employed by a lawyer, law office, governmental agency, or other entity, or may be authorized by administrative, statutory, or court authority to perform this work.

Substantive paralegal work experience must be verified by each employer (or previous employers, if necessary) by letter from the employer/attorney. Each employer must verify the applicant’s substantive paralegal experience (as defined above) and the time during which the work was performed.

The “Substantive Paralegal Employment Verification Letters” must be on the employer’s letterhead and specify dates, capacity of employment, and confirm the substantive paralegal experience with a statement from the employer that verifies the work would have otherwise been performed by an attorney; the paralegal performed the substantive work at least 80% of the time, whether the paralegal was full time or part-time; the average number of
hours worked per week and the time period of the employment. The Employment Verification Letters must match the employment history listed on the application and equate to the total experience required for the applicant’s selected eligibility pathway.

**CLE APPROVAL UNDER FASTTRACK**

Under the new FastTrack credentialing program, all CLEs must come from one of the providers on the Approved CLEs list (below). You will no longer be able to submit 3rd party CLEs to NFPA for review and approval, in order to include with your application or renewal.

Approved CLE providers for individuals (applications and renewals)
- NFPA
- An NFPA-member association
- Any court within the US
- Bar associations (ABA, ATLA, local bar associations)
- Inns of Court
- A military JAG School or military paralegal program
- NALA

**FastTrack PCCE® Synthesized Pathways**

<table>
<thead>
<tr>
<th>Education, Military Service, CRP credentials</th>
<th>Years of Substantive Paralegal Experience</th>
<th>CLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor Degree or higher</td>
<td>6 months</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application</td>
</tr>
<tr>
<td>Associate Degree</td>
<td>1 year</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application</td>
</tr>
<tr>
<td>Paralegal Certificate[4]</td>
<td>1 year</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application</td>
</tr>
<tr>
<td>Military Paralegal Rate (Job)[5]</td>
<td>Defined by rank</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application</td>
</tr>
<tr>
<td>NFPA Assurance of Learning Education Partner Students[6]</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>High School or GED</td>
<td>5 years</td>
<td>12 hours of NFPA-approved CLEs, including 1 CLE hour of ethics, within 2 years preceding the Application</td>
</tr>
</tbody>
</table>

**FastTrack PACE® Synthesized Pathways**

<table>
<thead>
<tr>
<th>Education, Military Service, CRP credentials</th>
<th>Years of Substantive Paralegal Experience</th>
<th>CLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor Degree or higher</td>
<td>2 years</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application[1]</td>
</tr>
<tr>
<td>Associate Degree</td>
<td>6 years</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application</td>
</tr>
<tr>
<td>Paralegal Certificate[2]</td>
<td>8 years</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application</td>
</tr>
<tr>
<td>Military Paralegal Rank of E6 or higher[3]</td>
<td>Defined by rank</td>
<td>1 hour of NFPA-approved ethics CLE, within 2 years preceding application</td>
</tr>
<tr>
<td>CRP credentials renewed for at least 2 cycles</td>
<td>Defined by PGCE</td>
<td>12 hours of NFPA-approved CLEs, including 1 CLE hour of ethics, within 2 years preceding the Application</td>
</tr>
<tr>
<td>High School or GED</td>
<td>10 years</td>
<td>12 hours of NFPA-approved CLEs, including 1 CLE hour of ethics, within 2 years preceding the Application</td>
</tr>
</tbody>
</table>
Coming to NFPA in 2020

**JULY 1**
DEADLINE FOR NFPA AWARD NOMINATIONS & SCHOLARSHIP APPLICATIONS

**JULY 1**
REGISTRATION OPENS FOR 2020 ANNUAL CONVENTION

**AUGUST 23**
DEADLINE TO SUBMIT AGENDA TOPICS

NFPA MEMBER DISCOUNTS
DETAILED ONLINE AT WWW.PARALEGALS.ORG/DISCOUNTS

**HOTEL ENGINE**
NFPA is proud to partner with Hotel Engine, a private hotel booking platform, to connect affinity organizations and their members to deeply discounted hotel rates.

**CAR RENTAL DISCOUNTS**
Want to visit home but don’t have a ride? We’ve partnered with Hertz, Dollar and Thrifty to bring you great offers on rental cars with discounts up to 25%. Plus, there are thousands of locations locally & abroad so you can get where you’re going fast! *Age Restrictions May Apply

**EMAIL MARKETING SOLUTION**
Constant Contact®, Inc.'s email marketing and online survey tools help small businesses and organizations connect to customers quickly, easily, and affordably and build stronger relationships. NFPA Members receive an additional 10% off the standard prepay discounts. That is 20% off six months, or 25% off the full year.

Be a step above the rest - Join the Paralegal Division of the State Bar of Texas

PD provides many benefits for career growth:
- Networking with paralegals across the state
- Powerful CLE opportunities such as Texas Advanced Paralegal Seminar (TAPS)
- Professional Development
- Professional magazine with substantive articles and updates from across the nation

THINK ABOUT IT — an organization designed just for YOU! ENHANCE YOUR CAREER by becoming a part of PD today.
Go to www.txpd.org and see for yourself or contact the PD Coordinator via email at pd@txpd.org or call (806) 832-3267.
SEPTEMBER 2
DEADLINE FOR BOARD NOMINATIONS

SEPTEMBER 22
DEADLINE FOR CONVENTION BIDS

OCTOBER 25-30
NATIONAL PRO BONO WEEK

Be a step above the rest – Join the Paralegal Division of the State Bar of Texas

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- Complex Cases with Large Volume of Records Routinely Reviewed
- State and Federal Court Case Evaluations
- Travels when needed to conduct IMEs in VA, WV, & NC

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