



Policy Name: **Naming and Saving Files**

Files should be saved in the following format:

YEAR-MONTH-DAY NAME OF DOCUMENT - CLIENT NAME

The date should be in the following format yyyy/mm/dd.

- **Date.**
 - **Pleadings:** The date should be the date served or filed.
 - **Correspondence:** If sent by us, the date on the letter and the date sent should be the same. For letters received, the date should be the date on the letter, but should also be stamped with the date we actually received the letter and then scanned to Box.
 - **Other Documents:** The date should be in the following order--the (effective) date on the document, the date the final document is signed, or lastly the date the document was created if a draft.
- **Longer file names ok.** File names should tell you exactly what the document is.
- **Generally, don't abbreviate.** Often a search for certain types of documents won't catch abbreviations. Abbreviating the first name of an individual is OK.
- **Be accurate.** A memorandum in support of a motion is not a "motion."
- **Be thorough.** A summons with an attached complaint should not simply be described as a summons because that is the document on top. If a document has a cover letter, name the document(s) attached and add "with cover letter" to the description. If the letter is more than a mere letter, note the letter first and add "with attached [DESCRIBE DOCUMENT]"
- **Examples.** Some examples:
 - 2014-09-10 S. Jones's Memorandum in Support of Motion for Summary Judgment - J. Smith
 - 2014-10-5 J. Smith's Answers to S. Jones's Interrogatories with cover letter - J. Smith
 - 2014-11-23 Letter from J. Smith to S. Jones with attached vendor contract - J. Smith
 - 2014-12-2 Signed settlement agreement between J. Smith and S. Jones - J. Smith
- **Drafts.** If a document is a draft, the first word of the description should be, in all caps "DRAFT".
 - 2014-10-10 DRAFT vendor contract between J. Smith and S. Jones - J. Smith
- **Federal ECF.** For ECF documents from federal court, include the docket # in the description:

DOCKET NUMBER YEAR-MONTH-DAY NAME OF DOCUMENT - CLIENT
NAME

[01] 2015-01-09 Summons - J. Smith

Date Implemented: 1/6/2016

Review Date: 6/6/2016

Position Responsible for Activity: COO, Executive Legal Assistant