

FALL 2019 VOL. 25 NO.2

TPJ

Texas Paralegal Journal



New Directions



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PRESIDENT'S *Message*

Division with a Vision...Empowering Paralegals

Megan Goor, TBLS-BCP

Welcome to the *Texas Paralegal Journal*! I am the President of the Paralegal Division for 2019–2020. I am the Senior Paralegal for Art Brender and John Brender of The Brender Law Firm in Fort Worth, where I have been for 36 years, this month, and Board Certified in Personal Injury Trial Law. Our firm handles a variety of cases and has a very heavy trial litigation practice. I am fortunate enough to have attorneys who understand how a paralegal can be an integral part of the legal team and perform substantive tasks so they can concentrate on practicing law, but I am one of the few lucky ones; the majority of attorneys are unaware or still uneducated about these issues.

Members – please show this article to your attorneys and ask them to please read it and ask questions.

TO ATTORNEYS

The Paralegal Division's principal mission this year is to promote to attorneys the *paralegal's* adherence to Texas Disciplinary Rules of Professional Conduct, R.1.01. In particular, **Comment 8** to Rule 1.01, which, as of February 26, 2019 now includes technology, emphasizes each attorney to "strive to become and remain proficient and competent in the practice of law, including the benefits and risks associated with relevant technology. To maintain requisite knowledge and skill of a competent practitioner, a lawyer should engage in continuing study and education. . ." (<http://www.txcourts.gov/media/1443638/199016.pdf> (February 26, 2019)). It is vital that paralegals also be proficient and competent in their tasks, including being knowledgeable of related technology, to effectively assist attorneys. I encourage you to discuss the necessity of maintaining CLE with your paralegal and to support your paralegal's membership with a paralegal association.

Texas Paralegal Definition and Standards

In 2005, the State Bar of Texas Board of Directors and the Paralegal Division of the State Bar of Texas adopted a new definition for "Paralegal."

A paralegal is a person, qualified through various combinations of education, training, or work experience, who is employed or engaged by a lawyer, law office, governmental agency, or other entity in a capacity or function which involves the performance, under the ultimate direction and supervision of a licensed attorney, of specifically delegated substantive legal work, which work, for the most part, requires a sufficient knowledge of legal principles and procedures that, absent such a person, an attorney would be required to perform the task.

On April 21, 2006, the State Bar of Texas Board of Directors approved amending this definition by including standards which are intended to assist the public in obtaining quality legal services, assist attorneys in their utilization of paralegals, and assist judges in determining whether paralegal work is a reimbursable cost when granting attorney's fees. (<https://txpd.org/page.asp?p=Paralegal%20Definition%20and%20Standards>)

Considering the significance of Comment 8 above, the paralegal profession needs to follow these competency requirements as well. Please consider supporting your paralegal's involvement with the Paralegal Division or a local paralegal association. It is very important that your paralegal is acquiring CLE, obtaining board-certification, and staying well versed in updates in order to perform their tasks efficiently and effectively not only to provide cost-effective legal services, but



also to allow attorneys to focus on today's evolving practice of law. This will make attorneys, paralegals, and the legal profession as a whole even stronger.

The Paralegal Division has numerous member benefits to offer (which automatically includes a majority of the State Bar benefits) for an

active membership fee of \$75.00, a small investment in return for many advantages. The most notable benefit the Paralegal Division offers is an annual three-day CLE event (up to 14 hours of CLE) where PD members receive a \$100.00 discount. For a more complete list of the Paralegal Division's benefits, please visit <https://txpd.org/page.asp?p=Benefits>. For membership: <https://txpd.org/page.asp?p=Applications>

Texas Paralegal Ethics Handbook:

This handbook addresses ethical considerations for 17 practice areas, as well as in-house corporate, freelance, administrative, governmental, and regulatory law paralegals. This handbook, written by Paralegal Division members and available on the website, is recommended reading for various paralegal programs through the state and is sold and used in law firms and paralegal schools across the nation. <https://txpd.org/page.asp?p=Ethics%20Handbook%20Flyer>

TO MEMBERS – OUR GOALS AND NEWS

For our members, one of our focuses is to improve some of the many benefits of the Paralegal Division. The "Paralegal Pulse" e-newsletter is under construction and the new edition will be coming out

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Texas Paralegal Journal

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EDITOR'S *Note*

By Shanna Ellis, TBLS-BCP, Editor, tpj@txpd.org

Greetings and welcome to a new year! I'm Shanna Ellis and I will be your host as we embark on a journey through the latest and greatest in news, information, tips, and recognition from the Paralegal Division of the State Bar of Texas. I am proud to join Megan Goor as the Co-Editor of the Texas Paralegal Journal and aspire to provide the same level of professional journalism you have experienced thus far.

This edition contains information on the newly elected Executive Committee, Board of Directors and Committee Chairs—be sure to congratulate each of these individuals on their new appointments! Thank you to every single one of our awesome members who volunteer their time and experience to this organization in order to cultivate and promote the Paralegal profession.

On October 23, 2009 the Texas State Senate recognized October 23 as Texas Paralegal Day. We celebrate by coming together as Districts to recognize, congratulate, and award each other for outstanding accomplishments and acts of service to the legal profession and our communities. Each District holds its own celebration activities, which are listed in this edition—make plans to attend your district's event to partake in the festivities and meet other paralegals in your area!

The PD wants YOU to take a hands-on approach to service to your community by signing up for your district's Pro Bono Event. Be a part of something bigger by giving back to the place you call home. See inside for details on your district's planned activity.

If you have always wanted to travel somewhere over the rainbow, check out the Paralegals' trip to Bratislava and Budapest on April 17–25, 2020. Both of these cities are rich in history and culture and this excursion is an excellent way to experience these beautiful places while growing relationships with other paralegals from around the state. Please register by no later than December 1, 2019 if you are interested.

Every member of the PD is required to complete 6 hours of Continuing Legal Education to maintain their active membership, but, just like those pesky TSA agents at the airport, sometimes we have to check your stuff. This is a friendly reminder that it is imperative that you save your CLE attendance certificates for Spot Audits. Don't lose CLE credit you earned because "your dog ate your certificate" and now you can't prove your attendance! Our lovely Spot Audit coordinator goes the extra mile, but you can save her a trip by keeping your certificates in a safe place just in case—remember, audits are random.

All this and more lie in store for you just beyond this page...Happy Reading!
I look forward to serving as your Co-Editor for the 2019–2020 year of the TPJ.

Sincerely, Shanna Ellis, 2019–2020 TPJ
Co-Editor/Publications Chair



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DEADLINE FOR WINTER ISSUE IS

NOVEMBER 8, 2019. E-mail tpj@txpd.org.

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The Personal Injury Series: The Layman's Guide to Medical Terminology

By Shanna Ellis



We have all had that experience at the doctor's office—you go in for what you think is most likely a cold but by the time the doctor finishes telling you what is wrong you think you're infected with a horrible affliction of which you will surely die. It is only when you get in your car and Google all of the medical terminology your doctor used that you realize it's merely a sinus infection. Most of us will not admit that we do not understand what our doctor is saying; we simply go along with what is told to us.

Unfortunately, in the legal world we cannot nod and “uh-huh” our way through our clients' medical records; we need to know what these terms mean and how to interpret the various codes, abbreviations, symbols, and diagnoses. Attorneys rely on our understanding of medical terminology so that they can build a case strategy based on accurate, detailed summaries of the records. While different doctors use distinguishable methods of recording, there are some basic terms and methods we can rely on to be the same every time.

CPT Codes

A CPT, or Current Procedural Terminology, code is a five digit medical code used to report medical, surgical and diagnostic procedures and services developed and maintained by the American Medical Association (AMA).¹

Computerized Tomography (CT)	CPT	Description
Abdomen	74150	CT abdomen; w/o contrast
	74160	CT abdomen; with contrast
	74170	CT abdomen; w/o contrast followed by contrast
Abdomen & Pelvis	74176	CT abdomen and pelvis; without contrast material
	74177	CT abdomen and pelvis; with contrast material(s)
	74178	CT abdomen and pelvis; without contrast material in one or both body regions, followed by contrast material(s) and further sections in one or both body regions
Heart	75571	CT heart w/o contrast, with quantitative evaluation of coronary calcium
	75572	CT heart with contrast including 3D image

CPT codes are used to universally communicate procedures performed to other physicians, health facilities, and insurance companies and for billing purposes. These codes help eliminate confusion caused by the “you say tomato, I say tomato” conundrum.

Google can be of great use as a CPT code finder. Typing the CPT code directly into



the search bar will often pull the procedure up. I was also able to download a CPT Code list from the Centers for Disease Control and Prevention website at <https://www.cdc.gov/nhsn/xls/cpt-pcm-nhsn.xlsx> as an Excel spreadsheet, but it is not a comprehensive list.

ICD Codes

An ICD, or International Classification of Diseases, code is a medical code that physicians and other healthcare providers use to classify and code all diagnoses, symptoms and procedures related to an individual's medical care. These codes function in the same manner as CPT codes but are more specific to the diagnosis of a problem rather than the treatment for it. ICD codes have been around for a while; the first ICD code, known as the List of Causes of Death, was adopted by the International Statistical Institute in 1893!² The current list of codes, ICD-10 codes, were endorsed by the 43rd World Health assembly in 1990 and are used in over 100 different countries. These codes are updated periodically to accommodate new illnesses and diagnoses. The newest list, ICD-11 codes, should go into effect January 1, 2022.³ Be on the lookout and touch base with medical providers your firm utilizes to see when they plan to incorporate the new 11 codes.

ICD Codes usually begin with a letter followed by numbers:⁴

Some physicians will write a narrative report to fully describe a patient's issues however, some will only list their ICD Codes. It would be impossible to memorize all of the codes (despite your awesome go-getter attitude) so it is important to familiarize yourself with their appearance and know where to locate their meaning. The Centers for Disease Control and Prevention has a PDF version of ICD-10 codes available for download on their website <https://www.cdc.gov/nchs/icd/icd10cm.htm> but there are a few free ICD Code lookup sites that are available online as well that will save you some time. I use ICD10Data.com⁵ and ICD-10 Code Lookup.⁶ Type in the ICD code from the record and the site will give you the description for the code, which you can then use to help decipher the rest of the records (good luck with those chicken scratch handwritten doctor notes; I have absolutely no advice to give you on that problem).

Medical Abbreviations

Medical providers will often use abbreviations or symbols instead of writing words out. This is a basic skill they learned in medical school, but to the paralegal trying to decode all of these letters and symbols in their client's medical records it equates to trying to translate ancient Egyptian hieroglyphics. Luckily, there are resources available to alleviate the stress of playing archeologist that are much more accessible than the Rosetta Stone.

As with ICD codes, it is impractical to memorize all of them, but here are a few of the more common codes and symbols you may want to commit to memory⁷:

abn—abnormal
c—with
c/o—complaint of
CC—chief complaint
dx—diagnosis
D/C—discontinue
FX—fracture
H&P—history and physical examination
H/O—history of
LOC—loss of consciousness
M/H—medical history
N/V—nausea or vomiting
neg—negative
p.r.n—as needed
PT—physical therapy
q.d.—each day (as in medicine)
s—without
s/p—status post
SOB—shortness of breath
VSS—vital signs are stable
~ —approximately
—increase/decrease
Ø – with no
ø – none

Google can once again be a great source for information, but caution—it may take specific keywords to find what you are looking for. I found a great list online here <https://www.avera.org/app/files/public/13782/Med-Aide-Abbreviations--Symbols.pdf>. This list contains considerable information but may not be comprehensive.

Medical Dictionaries

Internet research of medical terminology is, in my opinion, one of the most efficient and fastest ways to get the information you need; it stays current and often you are able to access images as well as definitions. With that being said, some of us prefer having a reliable medical dictionary on hand. There are a few options out there that are made specifically for legal use and

Code	Chiropractic Subluxation Codes
M99.00	Segmental and somatic dysfunction of head region- M
M99.01	Segmental and somatic dysfunction of cervical region-
M99.02	Segmental and somatic dysfunction of thoracic region-
M99.03	Segmental and somatic dysfunction of lumbar region-
M99.04	Segmental and somatic dysfunction of sacral region- M
M99.05	Segmental and somatic dysfunction of pelvic region- M
Code	Cervical and Headache Disorders
M53.0	Cervicocranial Syndrome
M53.1	Cervicobrachial Syndrome



many of these have illustrations available. The more comprehensive dictionaries are quite costly, but some publishers have made editions that are very affordable. Below is a sampling that I found that are well reviewed and affordable:

- Attorney's Illustrated Medical Dictionary by Biagio Melloni and Ida Dox
Used Hardcover found on Amazon—\$129.77
- Mosby's Medical Dictionary by Mosby New found on Amazon—\$28.86
- Merriam-Webster's Medical Dictionary 1st Edition by Merriam-Webster New found on Amazon—\$7.83
- Taber's Cyclopedic Medical Dictionary 23rd Edition by Donald Venes New found on Amazon for \$38.94
- Dorland's Illustrated Medical Dictionary 32nd Edition originally by W.A. Newman Dorland New Hardcover found on Amazon—\$40.75

These are some of the best that I was able to find as comprehensive editions but are also pricier (based on my search results):

- Attorney's Dictionary of Medicine by J.E. Schmidt, MD
Volumes 1–6 in ebook format found at LexisNexis store—\$2,218.00
- Attorney's Textbook of Medicine 3rd Edition originally by Roscoe N. Gray, MD, Louise J. Gordy, MD, LLB, currently written by David and Cecile Simerman, Barbara Robb and various other writers
19 volumes in ebook format found at the LexisNexis Store—\$10,563.00
Volume unknown in ring binder on Amazon—New—\$15,799.54, Used—\$84.99

Having a solid foundation of understanding the basics will go a long way when building your medical knowledge framework and is an essential tool for paralegals that review medical records. The medical field is constantly evolving and expanding and, just like the law, staying apprised of changes and updates will ensure your clients are getting the highest quality of care and legal representation.

Stay tuned for the next edition of The Personal Injury Series—The Paralegal/Psychologist: Handling Personal Injury Clients

Disclaimer: Nothing in this article should be construed as an endorsement or advertisement for any website, store, author, book, or company. All cities to any website, store, book, company, or author are based solely on my personal research and I was not influenced in any way to promote any specific entity.

1. <http://www.radiologybillingcoding.com/2011/07/radiology-added-cpt-code-74176-74177.html>
2. <https://www.who.int/classifications/icd/en/>
3. <https://www.who.int/classifications/icd/en/>
4. <http://independenthealthmedicareinformation.blogspot.com/2017/07/chiropractic-icd-10-codes-for-medicare.html>
5. <https://www.icd10data.com/ICD10CM/Codes>
6. <https://icdcodelookup.com/icd-10/codes>
7. <https://www.avera.org/app/files/public/13782/Med-Aide-Abbreviations--Symbols.pdf>



Shanna Ellis is the paralegal & office manager at The Dauphinot Law Firm, in Arlington, TX, specializing in Personal Injury, Civil Rights, and Employment Law.

soon. Instead of a monthly district newsletter, you will be receiving a monthly state-wide newsletter with the districts' news and other resourceful information from different committees.

Another focus is to have more student paralegal involvement this year. Student liaisons are being selected and will be reaching out to your districts for paralegal student activities.

Looking ahead, we have the 40th Anniversary Ad Hoc Committee in place this year to plan for the 40th Anniversary of the Paralegal Division

in 2020. Also, we have a new committee, the Strategic Long-Term Planning Committee, which will be enacted next month. This committee will review the direction of the paralegal profession, the utilization of paralegals, and the stewardship of the Paralegal Division.

The "Keep Your CLE (Certificate)" campaign is underway and the Membership Renewal Spot Audit will be begin soon. This audit is performed annually and more often than not, the audited member does not have the CLE certificates to support the claimed CLE

for membership; please take the time to log in your CLE online on the PD website and put your certificates in a folder, digital or otherwise, as soon as you are back at your desk from your CLE. "By failing to prepare, you are preparing to fail."—Benjamin Franklin.

There is more to come. I look forward to this upcoming year and thank you for being a Paralegal Division member.

--Megan Goor, TBLS-BCP
President 2018–2019



Answers to the Old Question, “How Do I Utilize a Paralegal?”

By Lydia P. McBrayer, CP and Janet L. McDaniel, CP

For a seasoned Paralegal, the answer is simple – **Communicate**. We have all heard that particular instruction for years and it still tops the list for every member of the legal team. Communication between an attorney or attorneys and their assigned paralegal cannot be ignored.

- 1) Attorneys and paralegals must build a basic working relationship with a firm foundation of communication. A daily quick meeting, preferably first thing in the morning, goes a long way towards building rapport, information exchange and, most importantly, trust.
- 2) Include your paralegal in planning/information meetings with the client and other attorneys. This gives the paralegal a “heads-up” that there will be various assignments associated with cases – discovery, research, document production. Associate attorneys often use a paralegal as a source for guidance on preferred practices within the firm. If the paralegal is included in the planning/information briefing, he or she will have notes that could be beneficial to the associate attorney as well as the supervising attorney. He or she will, at a minimum, be able to have a basic working knowledge of the assigned cases, tasks, etc.
- 3) Include the paralegal in calendaring notices for litigation, mediations, estate planning, probate—all deadlines. Every member of the legal team from the legal secretary to the paralegal to the

attorneys must have access to information. No one likes to be blindsided with a deadline that was not communicated.

- 4) Early planning, particularly in litigation, can help alleviate those 11th hour panics to prepare the attorney for depositions or trial. A paralegal involved in documents review, preparation of draft discovery and draft responses is capable of intuitively tagging documents or deposition testimony for attorney review in the trial prep process. Experienced paralegals understand litigation and are capable of thinking and asking questions which provide insight into matters.
- 5) Remember a paralegal’s time is billable. Billable time = more income to the firm. Paralegals can draft discovery, responses to discovery requests, basic pleadings, motions, etc., freeing the supervising attorney and associate attorneys to move through more matters expeditiously. Paralegals are also able to perform legal research, asset searches, preparation of case materials for trial support software, all of which are billable tasks.

In summary, your paralegal is a team member and is ready, willing, and able to be included in all aspects of your case, from initial intake to trial. All you have to do is let us do our job. That is what we are here for!



Janet L. McDaniel, CP, is a certified paralegal who began her career in 1983. She currently serves as Director of District 11 of the Paralegal

Division, State Bar of Texas and is a member of the Texas Bar College and Midland County Bar Association. Jan works as a paralegal, gopher, You-Name-It for Lynch, Chappell & Alsop, P.C.



Lydia P. McBrayer, CP, is a certified paralegal who began her career in 1987. She is a member of the Paralegal Division, State Bar of

Texas, for whom she has served as Director of District 11, and Midland County Bar Association. Lydia works for Diamondback Energy as a paralegal and Jill-of-all-Trades.



How to Text Your Clients without Losing Your Mind

This article was originally published on Lawyerist.com (<https://lawyerist.com/text-clients-without-losing-mind/>)

By Aretha Soderstrom on July 3rd, 2019

Lack of communication from attorneys is the most frequent complaint from clients. But with only so many hours in a day, how do you effectively communicate with clients? One easy way to alleviate client dissatisfaction is through text messaging.

Why You Should Be Texting Your Clients

These days, texting is the most used way of communication for Americans under 50. In fact, more than 95% of Americans own cell phones, and nearly 75% of those users are smartphone users. We send 8.5 billion text messages each day. And texting works, too. Those little pings enjoy an average open rate of 98% and a 45% response rate. Email, by comparison, has a 20% open rate and a 6% response rate, if you're lucky.

Text messaging is an easy way for you to schedule meetings with your clients and to send notifications, reminders, case status updates, links to documents, and even satisfaction surveys or review links. Your clients use their phones for these things every day. Why should your business not give your clients an option to communicate by text if that's what they prefer?

To make it easier, there are many software options that let you text clients from your computer so you can save your thumbs.

Besides, texting is so much easier and more convenient for everyone than leaving a voicemail.

Text Messaging Tools

Law Practice Management Software. M



ost law practice management software solutions include built-in features or simple integrations that let you send text messages directly from the platform itself. Clio, for example, integrates with Apptoto or Zipwhip. PracticePanther built its texting feature right into the software.

CRM, Client Intake, and Marketing Automation Software. Similarly, many CRMs, intake, and marketing automation software solutions include built-in or integrated text messaging options. Tools like Law Ruler, Lawmatics, and Lexicata facilitate your text messages to your clients from within the software.

Other software. In addition to software you're already be using in your practice, other options abound for how you can easily text your clients.

- Mighty Text links your phone with your computer so you'll be able to view, send, and receive text messages and attachments from your computer.
- Podium is a client relationship and review-management platform that

helps your clients check their case status from their phone and lets you text them from a live web chat. Plus, it saves all those communications within the platform for later review if needed.

- Signal is something we've talked about before. It's a secure way to text encrypted messages to your clients with great security and easy set up and use.

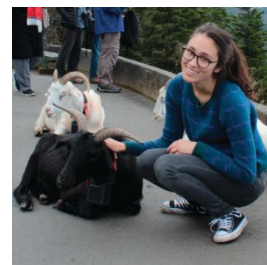
Other Texting Considerations

As you're looking for a tool to text clients, consider looking for a platform that lets you save them to your client file. And make sure it's a secure service that uses encryption and other basic security standards to protect your data and your clients'.

Finally, be professional. The jury is still out on it, but I'm pretty confident clients don't want to be getting poop emojis from their lawyer.

If you want to learn more about client communication, we've got just the thing for you.

Originally published on February 26, 2019 and updated on July 3rd, 2019
Last updated July 10th, 2019.



Aretha Soderstrom is an attorney and contract writer for Lawyerist.com. [@arethsoder](https://www.lawyerist.com/arethsoder)



MEET YOUR NEW 2019–2020 EXECUTIVE COMMITTEE!

President

Megan Goor-Peters, TBLS-BCP, Texas Board of Legal Specialization, Board Certified—Personal Injury Law

Megan is the Senior Paralegal, Office Manager, and Property Manager of The Brender Law Firm, located in the medical district of Fort Worth. She has worked for Art Brender since 1983, after starting her career in



the legal field as a legal secretary in 1982 for another law firm. Megan graduated from Southwest High School in 1983 and obtained her B.A. from the University of Texas at Arlington. Megan's experience at The Brender Law Firm includes personal injury, product liability, insurance bad faith, criminal, civil rights, probate, medical negligence, mass torts, class actions, sexual harassment, and employment discrimination cases from intake through trial and appellate litigation, including two cases before the United States Supreme Court, *Watson v. Fort Worth Bank & Trust*, 487 U.S. 977, and *Trevino v. Texas*, 503 U.S. 562.

Megan is a board-certified paralegal in Personal Injury Trial Law by the Texas Board of Legal Specialization in (2008). Megan currently serves as the President (2019–2020) and Ambassador of

the Paralegal Division. She has previously served as President (2016–2017), Director of District 3 (2012–2015), Parliamentarian (2014–2015), former Board Advisor to the Pro Bono Committee, Annual Meeting Committee, and Vendor Liaison Ad Hoc Committee, and former Liaison to the Texas Young Lawyers Association and the American Bar Association. Megan was appointed and serves on the Legal Services to the Poor in Civil Matters by the State Bar of Texas (2017–2020); She is also a Member of the Tarrant County Bar Association Membership Committee. Megan also served as the Fort Worth Paralegal Association's Professional Development Chair and as the SBOT Liaison to the Paralegal Division. Megan received the Fort Worth Paralegal Association's Paralegal of the Year 2014 Award and the Paralegal Division's highest honor, the Award of Excellence, in 2018.

Professional affiliations: Active Member of the Paralegal Division of the State Bar of Texas, Active Member of the Fort Worth Paralegal Association; member of The College of the State Bar of Texas; Paralegal Affiliate Member of AAJ; and an Associate Member of the Tarrant County Bar Association.

Megan has served as Advancement Chair and Committee Member of Boy Scouts of America, Cub Scouts, Pack 9 (2008–2013) and Committee Member on the Vision Committee 2013 of St. Paul Lutheran Church. She is Public Relations Chair for the Joshua High School Baseball Booster Committee.

"I am very honored to serve as

President of the Paralegal Division and hope to inspire and encourage our members to take advantage of your benefits and become more involved with their district, whether volunteering as a mentor, volunteering at a CLE or pro bono event, or contributing to the e-group list."—Megan

President-Elect

Edna W. Garza-Guerra, TBLS-BCP, Texas Board of Legal Specialization, Board Certified—Civil Trial Law

Edna is the President-Elect for the 2019–2020 term. She has been a

member of the Paralegal Division since 2011 and served as the District 15 Continuing Legal Education Committee Sub-Chair

from 2011–pres-

ent. Edna also serves as the Chair of the Procedures Manual Committee.

Edna has 25 years of experience as a Paralegal. She obtained her Paralegal certificate from South Texas Vo-Tech in McAllen, Texas in 1991 and was also a Paralegal Instructor for 4 years at South Texas Vo-Tech from 1994–1998. Edna obtained her board certification in Civil Trial Law by the Texas Board of Legal Specialization in December 2014. For most of her paralegal career, Edna has





worked in litigation, specializing in personal injury/wrongful death cases, commercial/lender-liability, employment and collection work. Edna obtained her real estate license in May 2012 and is a part-time Realtor. Edna is a member in the Greater McAllen Association of Realtors; The Texas Association of Realtors; and the National Association of Realtors.

“My job as PE thus far has been basically to observe and learn from the President, Megan Goor. I get to ask questions when I don’t understand a procedure and/or make comments when necessary in my bi-weekly telephone conferences with Megan (President) and Rhonda (PD Coordinator). I’ve been able to see what goes on behind the scenes first hand in all aspects of this professional organization. The tremendous teamwork associated with all the different committees that make the PD run smoothly is just absolutely amazing—definitely teamwork at its finest! Most Members may not realize all the hard work that goes into making the PD run smoothly. But in reality, we couldn’t do all this work without the help of our volunteers. Great job everyone, your service and hard work is truly appreciated! For those of you looking to volunteer, let me just say that it is an honor and a very gratifying experience, one I hope you get to experience in the future!”—Edna

Treasurer Rebecca Lopez

Rebecca Lopez is currently employed as a Paralegal with the Office of General Counsel for El Paso Water Utilities, City of El Paso. Prior to this she worked with sole practitioners, mainly in the areas of personal injury and medical malpractice, for about 16 years.

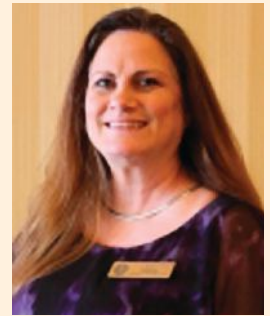


Rebecca has a Bachelor’s Degree in Criminal Justice and an AAS in Paralegal Studies. She recently participated in the local El Paso Community College DACUM (Developing a Curriculum) process which is comprised of a panel of expert workers, in this case paralegals, who analyze the tasks that successful workers in an occupation need to be able to perform on the job. This process was used to create relevant, up-to-date, and localized training programs and in developing the curriculum for a new paralegal program. Rebecca is also involved in various charity events throughout the city, both as a participant and/or volunteer.

Professional affiliations: Paralegal Division of the State Bar of Texas, El Paso Paralegal Association, Texas Bar College, National Association of Legal Assistants and El Paso Bar Association.

Secretary Lisa Pittman

Lisa Pittman has been a paralegal with the law firm of Hayes, Berry, White, & Vanzant, LLP working with partner Richard Hayes for over eighteen years. She has extensive experience in residential and commercial real estate, oil & gas, transnational, eminent domain, and civil litigation.



Lisa served the State Bar Paralegal Division as chair of the Public Relations Committee and Mentor/Protégé Committee from 2009-2012; as subchair for the Public Relations Committee from 2007-2008; and as a TAPS on-site volunteer for eleven years. Lisa is a member of the Denton County Paralegal Association and has served DCPA as Secretary/Parliamentarian in 2006, 2007, 2008 & 2011; and as Treasurer from 2009 to the present. She served as Committee Chair for the Legal Directory Committee, Bylaws Ad Hoc Committee, and Newsletter Committee.

Lisa and husband, Todd, have two adult children, Shaun & Natasha, three beautiful granddaughters, Nevaeh, Savannah & Kelci, one rambunctious grandson, Kason. In her spare time, Lisa also enjoys spending time with her family, road trips with her husband on their Harley Davidson, reading, sewing, and crocheting. Lisa, her husband and daughter breed, raise and show their purebred Arabian horses.



Parliamentarian Susi Boss

Susi Boss has been a paralegal for over 35 years with experience in bankruptcy, personal injury and family law and has been a Senior Paralegal at Higdon, Hardy & Zuflacht, LLP for 15 years.



Susi has been a member of the Paralegal Division since 2003 and currently serving as District 5 Director as well as President of the San Antonio Paralegal Association. Susi has an Associate's Degree in Paralegal Studies from the Kaplan College of Paralegal Studies.

Susi has been married to her husband Russ for 45 years. They have a son and daughter and 5 grandchildren. In her spare time, she is involved in many aspects of her church and enjoys her dogs, cats and horse. She and Russ enjoy cruises.

"I was very excited to become a member of the PD Board three years ago and to be the Parliamentarian for this new year has taken that even further.

I believe the Parliamentarian has a role on the EC that helps bring consistency to the Board in protocols and teaching all of us how to handle our meetings efficiently. I hope my knowledge in this area and work with the other EC members and Board will strengthen the Board and Paralegal Division as a whole."—Susi

Paralegal Division Coordinator Rhonda J. Brashears, CP, TBLS-BCP

Rhonda Brashears is a paralegal with the firm of Underwood Law Firm, P.C., Amarillo, Texas, and has been in the legal profession for over 30 years. She specializes in personal injury and civil trial defense law. She received her B.G.S. from West Texas A&M University in 1998, her Certified Paralegal designation from the National Association of Legal Assistants in 1996, and was board certified by the Texas Board of Legal Specialization in Personal Injury Trial Law in 1998.



Rhonda has been a member of the

Paralegal Division since 1990. She currently serves the Division as an Ambassador. In addition, she served as Director of District 7, 1996 until 2001, Secretary, 1999 to 2001, President Elect in 2001 and 2007, and President of the Division in 2002 and 2008. She has also previously served as Chair of the On-Line CLE Committee, the TAPS Planning Committee, the Publications Committee and as Editor of the *Texas Paralegal Journal*. Rhonda is a member of the Texas Panhandle Paralegal Association, where she has served as President, President-Elect, Treasurer and NALA Liaison.

"I serve as the Paralegal Division Coordinator. My role on the EC is one of mentor, to provide historical and procedural information about the Paralegal Division. I hope to continue to assist the EC with their goals to meet the needs of the Paralegal Division."—Rhonda



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We provide... leadership • professionalism • public service

Join PD and reap the benefits!

Below is a highlight of a few of the benefits that can make your membership invaluable.

- » **E-Group Forum:** Join the members-only forum with hot topics, forms, ethics, and general questions posted and answered by paralegals. The eGroup is a way for members to share information and to obtain input to help address questions. Say you have a question and think the group would be a good resource; you could send your question to the eGroup. In a matter of minutes, you can have an answer to your question, a fresh idea about the matter, or a lead in the right direction. The amount of time that you can save with the eGroup is worth the cost of membership alone.
- » **CLE:** The Paralegal Division provides many opportunities to obtain CLE. Every year the Paralegal Division sponsors the Texas Advanced Paralegal Seminar (TAPS), a 3-day CLE seminar where you can obtain up to 14 hours of CLE for one low great price. A majority of the topics are TBLS approved for those board certified paralegals. If you are not able to attend TAPS, the Paralegal Division provides other opportunities by providing at least 3 hours of CLE in your district and online CLE. The Paralegal Division has over 60 different CLE topics available online for those paralegals that are not able to attend CLE outside of the office. You can obtain your CLE hours while at your computer.
- » **Mentor Program:** The mentor program is available to all members of the Paralegal Division. The purpose of this program is to provide support on topics such as ethics, career advancement, professionalism, and the Division. Mentors will provide support, guidance, and direction to new paralegals that will strengthen their links to the paralegal community, and contribute to their success as a paralegal. Protégés also have access to valuable networking opportunities with other paralegals and the legal community through their mentor, as well as at state-wide and district Paralegal Division events.

Membership criteria and additional member benefits can be found at www.txpd.org under "Membership" tab. All applications are accepted and processed online at www.txpd.org/apply. Dues payment accepted by check, money order or credit card. Questions regarding membership in the Paralegal Division can be forwarded to pd@txpd.org or memberchair@txpd.org.

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Getting Help from a Financial Professional

By Craig Hackler

Are you suddenly on your own or forced to assume greater responsibility for your financial future? Unsure about whether you're on the right track with your savings and investments? Finding yourself with new responsibilities, such as the care of a child or an aging parent? Facing other life events, such as marriage, divorce, the sale of a family business, or a career change? Too busy to become a financial expert but needing to make sure your assets are being managed appropriately? Or maybe you simply feel your assets could be invested or protected better than they are now.

These are only some of the many circumstances that prompt people to contact someone who can help them address their financial questions and issues.

This may be especially true for women, who live longer than men on average and therefore may face an even greater challenge in making their assets last over that longer life span.

Why work with a financial professional?

- A financial professional can apply his or her skills to your specific needs. Just as important, you have someone who can answer questions about things that you may find confusing or anxiety-provoking. When the financial markets go through one of their periodic downturns, having someone



you can turn to may help you make sense of it all.

- If you don't feel confident about your knowledge of investing or specific financial products and services, having someone who monitors the financial markets every day can be helpful. After all, if you hire people to do things like cut your hair, work on your car, and tend to medical issues, it might just make sense to get some help when dealing with important financial issues.
- Even if you have the knowledge and ability to manage your own finances, the financial world grows more intricate every day as new products and services are introduced. Also, legislative changes can have a substantial impact on your investment and tax planning strategy. A professional can monitor such developments on an ongoing basis and assess how they might affect your portfolio.

- A financial professional may be able to help you see the big picture and make sure the various aspects of your financial life are integrated in a way that makes sense for you. That can be especially important if you own your own business or have complex tax issues.
- If you already have a financial plan, a financial professional can act as a sounding board, giving you a reality check to make sure your assumptions and expectations are realistic. For example, if you've been investing far more conservatively than is appropriate for your goals and circumstances, either out of fear of making a mistake or from not being aware of how risks can be managed, a financial professional can help you assess whether and how your portfolio might need adjusting to improve your chances of reaching those goals.

When should you consult a professional?

You don't have to wait until an event occurs before consulting a financial professional. Having someone help you develop an overall strategy for approaching your financial goals can be useful at any time.

However, in some cases, a specific life event or perceived need can serve as a catalyst for seeking advice. Such events might include:

- Marriage, divorce, or the death of a spouse
- Having a baby or adopting a child
- Planning for a child's or grandchild's college education
- Buying or selling a family business
- Changing jobs or careers
- Planning your retirement
- Developing an estate plan
- Receiving an inheritance or financial windfall

MAKING THE MOST OF A PROFESSIONAL'S EXPERTISE

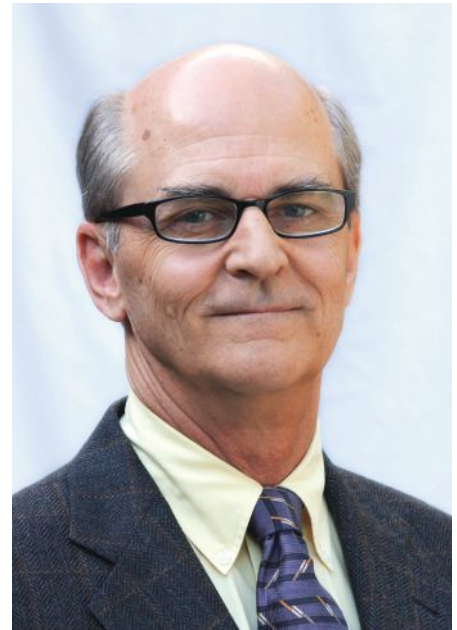
- You'll need to understand how a financial professional is compensated for his or her services. Some

receive a fee based on an hourly rate (usually for specific advice or a financial plan), or on a percentage of your portfolio's assets and/or income. Some receive a commission from a third party for any products you may purchase. Still others may receive some combination of fees and commissions, while still others may simply receive a salary from their financial services employer.

Don't be reluctant to ask about fees; any reputable financial professional shouldn't hesitate to explain how he or she is compensated.

- Even if you're a relative novice when it comes to finances, don't be afraid to ask questions if you don't understand what's being presented to you. You're not being rude; you're simply trying to prevent misunderstandings that could backfire later.
- Don't let yourself be pressured into making a financial decision you're not comfortable with or don't understand. This is your money, and you have the right to take whatever time you need. However, give yourself a deadline for your decision so you don't get caught in "analysis paralysis."
- If you think your financial life simply needs a checkup rather than a complete overhaul, you'll need to clarify the areas in which you're looking for assistance. That can help you decide what type of advice you're looking for from your financial professional, though you should also pay attention to any additional suggestions raised during your discussions. Your plans should take into consideration your financial goals, your time horizon for achieving each one, your current financial and emotional ability to tolerate risk, and any recent changes in your circumstances.
- Don't assume you have to be wealthy to make use of a financial professional. While some do focus on clients with assets above a certain level, others do not.
- Think about the scope of the services you'll need. Do you want comprehensive help in a variety of areas, or would you be better off assembling a team of specialists? Do you need an ongoing relationship, or can your needs be taken care of on a one-time basis? If you're a relative novice or having to deal with decisions you've never had to make before, someone with broad-based expertise might be a good place to start.
- Even if you feel you need detailed advice from several different specialists—for example, if you own your own business—consider whether you might benefit from having someone who can coordinate among them. A financial professional can sometimes be a gateway to other professionals who can help with specific aspects of your finances such as accounting tax and/or estate planning, insurance and investments.
- If you want comprehensive management, you may be able to give a financial professional the independent authority to make trading decisions for your portfolio without checking with you first. In that case, you'll likely be asked to help develop and sign an investment policy statement that spells out the specifics of the firm's decision-making authority and the guidelines to be followed when making those decisions.
- If you feel that consulting an expert might be helpful, don't postpone making that call. The sooner you get your questions answered, the sooner you'll be able to pay more attention to the things—family, friends, career, hobbies—that an organized financial life could help you enjoy.

Craig Hackler, Financial Advisor Holds the Series 7 and Series 63 Securities Licenses, as well as the Group I license (life, health, annuities). Through Raymond James Financial Services, he offers complete financial planning and investment products tailored to the individual needs of his clients. He will gladly answer your questions. Call him 512.391.0919



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Courtroom Effective Technology

Matt Lalande August 14, 2019

This article originally appeared on Law Technology Today at <https://www.lawtechnologytoday.org/2019/08/courtroom-effective-technology/> and can also be found at the author's website at <https://www.hamiltonlawyers.com/>

Jury Attention and Retention is the Goal

Today's trial judges are not only encouraging courtroom technology but they're expecting it. It's become quite infrequent to find lawyers who are prosecuting or defending actions without the use of some sort of visual or audio technology to keep a jury's attention and retention of information.

Why Do Jurors "Expect Some Sort of Technology" in a Courtroom?

Because this is how we live. Technology has changed the way we live in such fundamental ways that we are influenced and transformed by it every day. Think about it this way—over two million smartphones are sold every day! The amount of information being shared by email, text message or social media is absolutely phenomenal. We live in a world where people can transfer messages in nanoseconds to loved ones around the world. We can pay bills, transfer funds, watch any type of television or sporting event from around the world, and send pictures with the touch of a screen. We live in a world of digital media, cloud computing, video conferencing and personal fitness evaluation on our wrists. Do we really expect juries to sit in a courtroom for days on end and listen to over-utilized complex verbal communication without some sort demonstrative evidence by technology? If so, be prepared for your tech-savvy jury members to nod off. In today's world, juries expect to be entertained. Keeping the attention of the finders of fact is absolutely paramount.

Different Types of Courtroom Technology

Depending on your technology comfort level, there are many tools available for lawyers to use in a courtroom, from simple software video presenters to trial presentation software.

PowerPoint

PowerPoint is a great option and can be extremely effective during your opening and closing statements. By now, even the most digitally unsophisticated lawyer knows how to use PowerPoint or has someone nearby that can help. A simple presentation of medical terms, or of photos and documents admitted to evidence could be easily used to magnify and highlight the important points of your case that you intend to present. Try to not overuse PowerPoint and overload the jury with too much information, do not dilute your message with too many bullet points or let your slideshow water-down your

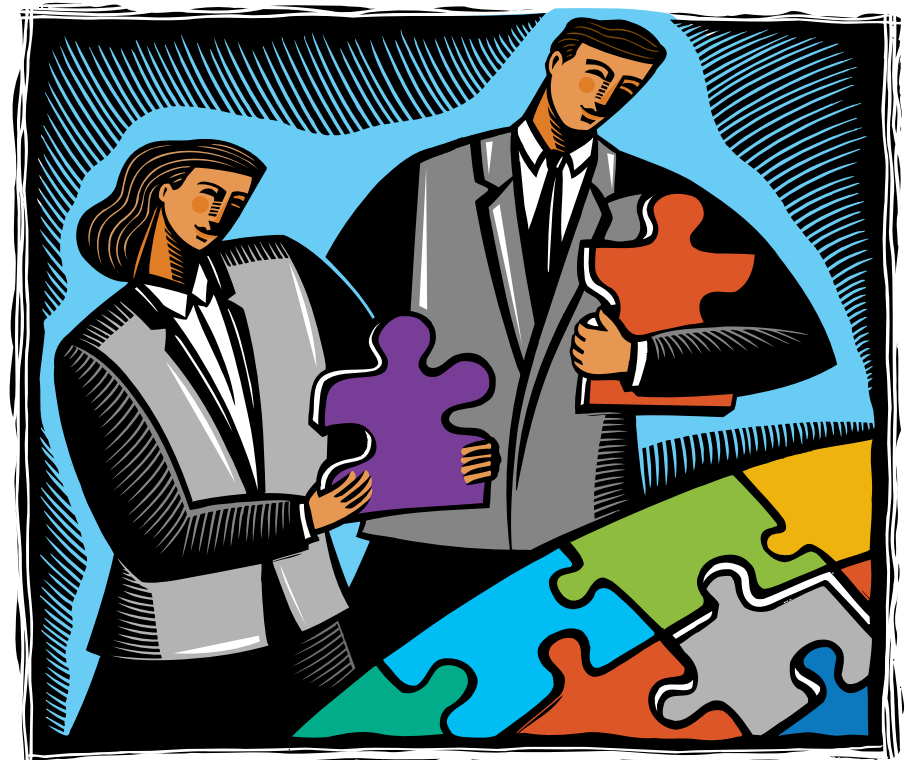
oral persuasion.

The Elmo is Not Dead

The Elmo document camera has been used by trial lawyers for over 20 years. Despite most of our files and documents being paperless, it's still handy (and necessary!) to have a good visual presenter like an Elmo at trial. For lawyers that are not overly confident in using trial presentation software, having an Elmo is still an extremely effective presentation tool to place documents and exhibits up on a screen in front of a jury while questioning witnesses.

Trial Presentation Software

In today's day and age, trial presentation software is quite limitless. When focusing on trial presentation software, it's important to understand the basics of cloud computing. In 1996, Compaq computers started the buzz about cloud computing and how it was predicted that people would increasingly access software and files over the web. Today, this is becoming the basis of all digital usage. Cloud computing can be basically understood as the storage or hosting of your documents and files either on your servers or on servers belonging to a paid service's network such as Dropbox or Microsoft SharePoint.



Storage contents can then be synchronized to computers and/or mobile devices that are part of that particular cloud service.

With trial work, lawyers can quickly assemble documents, exhibits, transcripts, graphics, demonstrative evidence, etc. and upload the information directly into Dropbox or SharePoint, to then reproduce onto a screen via a projector or directly into the courtroom's video input (if that exists in your area).

Trial presentation software, such as Sanction, Trialpad or Trial Director are well known for the storage, management, retrieval and display of documents, photos, images, etc. Trial Director is possibly the most well-recognized trial software program on the market—although very expensive and you will likely need a second body in the courtroom to simply to run the program unless you are using the iPad version, which has an intuitive interface. I have used trial director for iPad during examinations of individual witnesses instead of using an Elmo – although always remember – courtroom technology can be terribly unpredictable. Trials are akin to being in a pressure cook-

er and the last thing you need is for your technology to fail during vital and critical moments. I would highly recommend to always keep the exhibits that you plan to use in paper copy, along with your Elmo handy in case your devices and software backfire. Always have a backup plan.

Courtroom Technology: Plan Ahead

Speaking of courtrooms, if you're attending a trial out of town, always remember that some courtrooms have been properly renovated to meet the demands of demonstrative presentation (such as video displays mounted directly in the jury box that could display exhibits, demonstrative evidence, graphics video, etc) while some have not. Some courtrooms have pulldown screens available to use via projector, while other courtrooms are simply not equipped with anything. It's important to find out ahead of time whether or not the local jurisdiction you're attending has technology enhanced courtrooms. Find out whether or not the courtroom has video displays, monitors, projector screens, a witness monitor, laptop connections, digital input connections, plugs in

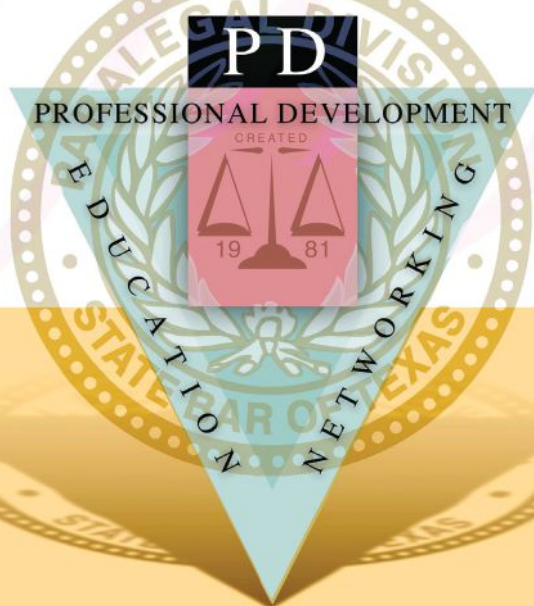
the right place, and wireless internet.

Attention and Retention

In the end, the most important thing is using the technology that you're comfortable with. There are limitless possibilities, but remember, the goal is to keep the jury's attention and keep them motivated. Don't get overwhelmed with the boundless options of software available to you as a trial lawyer. Use technology to not overemphasize or overwhelm a jury, but rather, use it to supplement and enhance your skilled presentation of evidence. Use it a little, use it a lot—but if you use it, and the other side is not, you are already at a major advantage. Technology won't make you a better lawyer, but it will help you increase your jury's attention and retention from start to the end.



Matt Lalande is the founding attorney of Lalande Personal Injury Lawyers, one of Hamilton's most trusted personal injury law firms.



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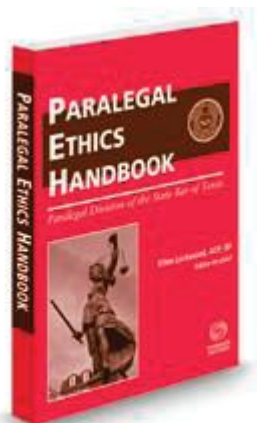
PD provides many benefits for career growth:

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- Powerful CLE opportunities such as Texas Advanced Paralegal Seminar (TAPS)
- Professional Development
- Professional magazine with substantive articles and updates from across the nation

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The Paralegal Ethics Handbook, 2018 ed.

By

Ellen Lockwood, Laurie L. Borski, Rhonda J. Brashears, Debra Crosby, Javan Johnson, Lisa Sprinkle

This handbook is an essential resource for experienced paralegals, those new to the profession, and the attorneys working with them.

The Paralegal Ethics Handbook is a resource for all paralegals that addresses ethical considerations for 17 practice areas, as well as considerations for in-house, corporate, freelance, administrative, governmental, and regulatory law paralegals. This title:

- Examines topics such as defining ethics, ethical obligations, and remaining ethical
- Addresses ethical considerations for e-filing, e-discovery, and technology
- Provides resources for state information and paralegal association ethics cannons, plus related information
- Contains rules and regulations for all 50 states and Washington, D.C
- Explains how to determine whether an action may be an ethical violation

Features & Benefits:

Format: Book - softbound

Components: Print 1

Pages: 332

Print Product Number: 40638127

Print Price: \$114.00

Price subject to change without notice.

9/26/2018

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Scruples

The Ethics of Signing Trademark Documents for the USPTO

Ellen Lockwood, ACP, RP

Clients and attorneys want everything done even more quickly these days. Many of us also telecommute rather than gathering in an office each day. While electronic filing and email may be more convenient, it also provides more opportunities for shortcuts and may make it more difficult for attorneys to properly supervise their staff. The United States Patent and Trademark Office (USPTO) regulations require the person named as the signatory on an electronic trademark document to be filed with the USPTO to personally enter his or her electronic signature on the documents (either the attorney or the party) (17 C.F.R. 6 2.193(a)(2), (c) and (e)). The signatory must manually enter the elements of the electronic signature, another person may not sign for the signer, and non-attorneys may not sign the attorney's name (TMPEP 611.01(b)). Further, many of these filings include important warning language such as the following:

The signatory being warned that willful false statements and the like are punishable by fine or imprisonment, or both, under 18 U.S.C. 6 1001, and that such willful false statements and the like may jeopardize the validity of the application or submission or any registration resulting therefrom, declares that all statements made of his/her own knowledge are true and all statements made on information and belief are believed to be true.

Recently, the USPTO issued a public reprimand and citation against an attorney. The attorney worked for a worldwide

law firm that specializes in handling intellectual property matters, offering these services at a drastically reduced cost. In the USPTO's order, the attorney admitted she had learned that paralegals were signing clients' names to USPTO trademark filings. She stated the practice began before she joined the firm and she asserted that at that time she did not understand the USPTO regulations that prohibited this practice. The attorney testified she notified her superiors of the practice when she became aware of it but was told corrective action was not needed at that time.

In another recent order, the USPTO issued a public reprimand of an attorney who was the CEO and president of a virtual paralegal service. The order states that there were 35 applications where paralegals typed the electronic signatures of the named signatories. As in the matter mentioned above, the attorney stated he did not adequately understand the rules and relied on a consent from each signatory. He also agreed the paralegals were not adequately supervised.

The USPTO also issued an order this year regarding a Texas attorney and acknowledged his resignation. The attorney was the general counsel, one of the owners, and the only licensed attorney involved with an online firm that handles U.S. trademark applications and related matters. The attorney stated that without his knowledge, paralegals began cutting and pasting electronic client signatures onto trademark documents instead of having the clients electronically sign the documents. In one instance, paralegals submitted an Express Abandonment on behalf of a client without the client's knowledge

or consent, cutting and pasting the client's electronic signature. Paralegals were also giving legal advice to customers regarding their trademark applications.

The ease with which these paralegals violated these rules is, unfortunately, a byproduct of electronic filings, but it also a result of the lack of or ineffective supervision. These situations are another example of the need for strict policies and procedures for electronic filings to ensure the rules are always followed. If your firm does not have such policies and procedures in place, please discuss the need for them with your supervising attorney, paralegal manager, or office managing shareholder.



Ellen Lockwood, ACP, RP, is the Chair of the Professional Ethics Committee of the Paralegal Division and a past

president of the Division. She is a frequent speaker on paralegal ethics and intellectual property and the lead author of the Division's **Paralegal Ethics Handbook** published by Thomson Reuters. She may be contacted at ethics@txpd.org.



PARALEGAL DIVISION

STATE BAR OF TEXAS

BOARD OF DIRECTORS QUARTERLY BOARD MEETING SUMMARY

Summer 2019



*Submitted by President-Elect, Edna W. Garza-Guerra, TBLS-BCP
president-elect@txpd.org*

The Board of Directors had their Summer Board Meeting on June 7–8, 2019, in Dallas, Texas. The directors not only serve their districts, but act as a liaison to certain associations and board advisors to appointed committees. At the meeting, the Directors made their respective reports and did some brainstorming with focus on pro bono work. The President discussed combining all the districts' newsletters into one newsletter with a potential start-off date in July 2019. This would require each Director to submit their district's news and events in a timely manner. The new monthly newsletter format would allow the members across the state to see what is happening in the other districts.

Your Board of Directors and PD Coordinator:

President – Megan Goor, TBLS-BCP (president@txpd.org)

President Elect – Edna W. Garza-Guerra, TBLS-BCP (president-elect@txpd.org)

District 1 – Vacant (district1@txpd.org)

District 2 – Eugene Alcala (district2@txpd.org)

District 3 – Ninfa Cruz (district3@txpd.org)

District 4 – Vacant (district4@txpd.org)

District 5 and Parliamentarian —Susi Boss (district5@txpd.org)

District 7 – Erica Anderson, ACP (district7@txpd.org)

District 10 – Shannon Shaw (district10@txpd.org)

District 11 – Janet McDaniel, CP (district11@txpd.org)

District 12 and Secretary – Lisa Pittman (district12@txpd.org)

District 14 – Shannon Happney CP, TBLS-BCP (district14@txpd.org)

District 15 – Martha Ramirez, TBLS-BCP (district15@txpd.org)

District 16 and Treasurer – Rebecca Lopez (district16@txpd.org)

Paralegal Division Coordinator – Rhonda Brashears, CP, TBLS-BCP (pd@txpd.org)

Paralegal Division Committees

Your committees are hard at work for you as well. Get to know your [Committee Chairs](#). Please reach out to them if you are interested in learning more about how to serve on a committee or volunteer!

President Megan Goor has set various goals she'd like to focus on during the upcoming year (2019–2020). Her primary focus will include: Marketing the Paralegal Division's 40th Anniversary celebration in 2020; conducting a new salary survey; increasing the student ambassador program, the mentor/protégé program, and promoting more Pro Bono projects in each district. She would also like to increase membership benefits and plans to do a spot audit campaign to encourage members to keep their CLE sheets to avoid renewal issues from the members. We always appreciate hearing from you about comments, suggestions, and recommendations to bring to the Board.

The annual meeting (*now in conjunction with TAPS*) is scheduled on September 20–21, 2019, in Austin, Texas.



ETAL. Top Five Apps for Paralegals

Have you ever found yourself feeling as though there are not enough hours in the day to do all the things you need to get done? The following apps may help you save time and increase productivity:

Dropbox – a cloud-based file-sharing, storage, and collaboration app which keeps documents at your fingertips. Dropbox offers free and paid accounts for individuals and businesses. For more information or to sign up, visit www.dropbox.com.

Adobe Scan – scans documents from your cellphone camera and saves them as high quality pdf files. The app uses automatic text recognition technology allowing you to easily edit and save your scans. For more information or to sign up, visit www.adobe.com.

Adobe Sign – fill, sign, and send any pdf form electronically from your desktop, browser, or mobile app. Each pdf document is locked so recipients can be assured that it hasn't been altered since you completed it. Adobe Sign is a paid app but comes with a free 30-day trial. For more information or to sign up, visit www.adobe.com.

Slack – allows you to create teams and communicate with team members through instant messaging. Organize conversations by

topic or project, share and edit documents, and easily integrate tools and services such as Google Drive, Dropbox, Asana, Twitter, and others. Slack maintains a central knowledge base which automatically indexes and archives your team's past conversations and files. The app allows you to customize your notifications so you can stay focused on your priorities. For more information or to sign up, visit www.slack.com.

Free Conference Call – a free online meeting service for screen sharing, web conferencing, webinars and more. Sign up with an email and password then you will be assigned a dial-in number and access code for immediate conferencing. You also receive an Online Meeting ID for hosting meetings with screen sharing and video conferencing. It's always free! For more information or to sign up visit www.freeconferencecall.com.

Add these apps to your library today and start saving time and increasing your productivity!

Submitted by

Professional Development Committee,
Paralegal Division of the State Bar of Texas



THE NATIONAL ACADEMY OF DISTINGUISHED NEUTRALS

ATTENTION LITIGATION STAFF



OVER 60 OF TEXAS' PREMIER CIVIL-TRIAL
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*This online calendaring service is entirely free, funded by the members of our Texas Chapter of the Academy.
To view the National Academy's free database of over 1000 top-rated mediators & arbitrators, simply visit www.NADN.org/directory*

Welcome to our 2019–2020 Committee Chairs!

Annual Meeting Committee

Chair: Megan Goor, TBLS-BCP

Continuing education committee

Chair District CLE: Mary Mendoza

Board Advisor: Ninfa Cruz

Chair Online CLE: Margie Putman

Board Advisor: Ninfa Cruz

Elections Committee

Chair: Melanie Langford, ACP

Board Advisor: Shannon Shaw

District 1 Committee Member: Anita “CP”
Hamilton, CP

District 2 Committee Member: Melanie
Isaac-White

District 3 Committee Member: Summer
Chappell

District 4 Committee Member: Pamela M.
Etie, ACP

District 5 Committee Member: Cindy
Enloe, BCP

District 7 Committee Member: Juanita
Vasquez

District 10 Committee Member: Alisa
Tilling

District 11 Committee Member: Jo Ann
Dickinson

District 12 Committee Member: Pamela
Snively, ACP

District 14 Committee Member: Jennifer
Britt

District 15 Committee Member: Lisa Dallas

District 15 Committee Member: Rose
Ouderkirk

District 15 Committee Member: Letesia
Rodriguez

District 16 Committee Member: Rebecca
Lopez

Professional Development Committee

Chair: Christine Cook, RP

Board Advisor: Erica Anderson, CP

Professional Ethics Committee

Chair: Ellen Lockwood, ACP, RP®

board advisor: Shannon shaw

Public Relations Committee

Chair: Erica Anderson, ACP

Blog Coordinator: Melanie Langford, ACP

Board Advisor: Martha Ramirez, TBLS-
BCP

Publications Committee

Chair: Shanna Ellis

Board Advisor: Janet McDaniel, CP

TPJ Editor

Shanna Ellis

TPJ Advertising

Advertising Coordinator: Rhonda J.

Brashears, CP, TBLS-BCP

Procedures Manual Committee

Chair: Edna W. Garza-Guerra, TBLS-BCP

Ambassador Ad Hoc Committee

Chair: Joncilee M. Davis, ACP

Board Advisor: Lisa Pittman

Ambassador: Erica Anderson, ACP

Ambassador: Michele Boerder, CP

Ambassador: Rhonda J. Brashears, CP,
TBLS-BCP

Ambassador: Clara Buckland, CP

Ambassador: Debra Crosby

Ambassador: Joncilee M. Davis, ACP

Ambassador: Patricia Giuliano

Ambassador: Megan Goor, TBLS-BCP

Ambassador: Javan Johnson, ACP, TBLS-
BCP

Ambassador: Ellen Lockwood, ACP, RP®

Ambassador: Stephanie Sterling, TBLS-
BCP

Ambassador: Mona Tucker, ACP

Ambassador: Susan Wilen, RN

E-Group Policy Ad Hoc Committee

Chair: Shanna Mello

Board Advisor: Rebecca Lopez

Ethics Handbook Ad Hoc Committee

Chair: Ellen Lockwood, ACP, RP®

Board Advisor: Shannon Shaw

Paralegal Pulse—E-Newsletter

Co-chair: Brenda Colvin, TBLS-BCP

Co-chair: Gabriela Warner

Board advisor: Erica Anderson, acp

Pro Bono Ad Hoc Committee

Chair: Sheila Posey, TBLS-BCP

Board Advisor: Eugene Alcala

Member Renewal Spot Audit Committee

Chair: Debra Pointer

Board Advisor: Shannon Happney, CP,
TBLS-BCP

Mentor Program Ad Hoc Committee

Chair: Debra Pointer

Board Advisor: Eugene Alcala

TBLS Helpful Hints Ad Hoc Committee

Chair: Javan Johnson, ACP, TBLS-BCP

Board Advisor: Martha Ramirez, TBLS-
BCP

Texas Advanced Paralegal Seminar (TAPS) Planning Committee

Chair: Stephanie Sterling, TBLS-BCP

Board Advisor: Megan Goor, TBLS-BCP

Texas Bar College Application Review

Chair: Jena Parker, CP

Board Advisor: Janet McDaniel, CP

Sustaining Member/Vendor Liaison

Chair: Susan Davis, TBLS-BCP

Board Advisor: Susi Boss

40th Anniversary Ad Hoc Committee

Chair: Javan Johnson, ACP, TBLS-BCP

Board Advisor: Shannon Happney, CP,
TBLS-BCP

State Bar of Texas Child Protection Section

Representative: Susi Boss

State Bar of Texas Legal Services to the Poor in Civil Matters

Representative: Megan Goor, TBLS-BCP

State Bar of Texas Pro Bono Workgroup

Representative: Stephanie SSterling, TBLS-
BCP

State Bar of Texas Unauthorized Practice of Law Committee—Northern Region District 6

Representative: Eugene Alcala

Texas Bar College Paralegal Division Representative

Representative: Jena Parker, CP

COME TOGETHER...

Join your fellow paralegals to celebrate the profession and each other!

District Paralegal Day Events:

- | | | | |
|-------------|--|--------------|--|
| District 1: | October 30 from 11:30 a.m. to 1:00 p.m. at TBD. Brown Bag CLE. Guest Speaker: Vanetta Peterson. Please see your District Director for more details on this event. | | |
| District 2: | October 23, 2019 time TBD at the Belo Mansion (2101 Ross Avenue, Dallas, TX 75202). Hosted by the Dallas Area Paralegal Association, North Texas Paralegal Association, JL Turner Legal Association, SBOT PD. Guest Speaker: Laura Benitez Geisler. District 2 will distribute a flyer confirming the details of this event. | District 7: | TBD. See your District Director for details. |
| | | District 10: | TBD. See your District Director for details. |
| | | District 11: | October 10, 2019 at the Midland Country Club (6101 TX-349, Midland, TX 79705) in conjunction with Court Observance Day. Guest Speaker: Justice Keith Stretcher, 11 th Court of Appeals. Please contact your District Director for approximate times. |
| District 3: | October 30, 2019 from 11:30 a.m. to 1:30 p.m. at Pappadeaux Seafood Kitchen (2708 West Fwy, Fort Worth, TX 76102). Guest Speaker: Justice Elizabeth Kerr, 2 nd COA. | District 12: | TBD. See your District Director for details. |
| | | District 15: | TBD. See your District Director for details. |
| District 4: | October 23, 2019. Joint celebration with the Capital Area Paralegal Association at the Austin Bar Association House (816 Congress Avenue # 700, Austin, Texas 78701). Please see your District Director for more details regarding times and events. | District 16: | October 17, 2019 from 8:00 a.m. to 1:00 p.m. at the Stanton Tower Auditorium (100 N. Stanton Street, El Paso, TX 79901). A half day CLE seminar sponsored by the El Paso Paralegal Association, with lunch provided by the Association and door prizes. Guest Speakers: TBD. |
| District 5: | October 24, 2019 from 12:00 p.m. to 1:00 | | |

COME TOGETHER ... TO SERVE

“The highest of distinctions is service to others” – King George VI

Join your fellow paralegals to give back to the communities where we live and work!

District Pro Bono Service Events:

- | | | | |
|-------------|---|--------------|--|
| District 1: | TBD. See your District Director for details. | | |
| District 2: | TBD. See your District Director for details. | District 5: | October 15 at 5:30 p.m. Will's Clinic at St. Mary's University Center for Legal & Social Justice (tentative event). Please contact you District Director for confirmation. |
| District 3: | Food Pantry with the Fort Worth Paralegal Association (tentative event). Please see your District Director for confirmation. | | |
| District 4: | CAPA (Capital Area Paralegal Association) is involved with the Austin Bar Association Veteran's Clinics and will have a free legal clinic for veterans on October 21, 2019. Bell County Bar Association Paralegals work with Bell County Bar to do a Veteran's Clinic- the next one is on November 8, 2019. Bell County | District 7: | TBD. See your District Director for details. |
| | | District 10: | TBD. See your District Director for details. |
| | | District 11: | TBD. See your District Director for details. |
| | | District 12: | TBD. See your District Director for details. |
| | | District 15: | TBD. See your District Director for details. |
| | | District 16: | TBD. See your District Director for details. |



Accessed from free downloadable version at <http://acrossthefence.co/imgs/>

TO VOLUNTEER!

**Make an impact on your community by signing up for your district's
Pro Bono Service Project
this Fall!**

PDQ

“Paralegal Division QuickNotes”

2019–2020
www.txpd.org

The Paralegal Division (PD) provides great benefits to its members and works hard to establish educational opportunities and professional growth, as well as leadership opportunities. Here are some of the great membership benefits offered by the PD:

► Officers and Board of Directors

The 2019–2020 [Officers and Directors](#) are working hard to provide CLE events, networking opportunities, and additional avenues to grow professionally as well as advancing the paralegal profession. Many of these leaders participate in the Mentor program to protégés around the State. Some may even promote TBLS board certification! The PD Board and Officers look forward to hearing your feedback.

► All Membership Applications Online

Have you heard? All new membership applications and renewals are now handled online. Apply now at <http://www.txpd.org/> under the Membership tab. Renewal applications will be available beginning May 1, 2019.

★ CLE Online

► Online CLE

The Paralegal Division offers Online CLE to both members and non-members, but members receive a discount. Browse through the available topics or search for a specific topic in a specialty area of law on the website by clicking on the [CLE Online](#) tab. You'll be surprised at the variety and selection of seminars.

► CLE Calendar

If you are looking for CLE in your area, click on the searchable CLE calendar on the home page of the PD website at www.txpd.org. All CLE offered to paralegals throughout the state, including the PD's 12 districts, approximately 32 local paralegal associations in Texas, as well as other legal organizations and private CLE vendors, can be submitted at no cost for inclusion in the PD's CLE Calendar. To submit an event on the website, from the “CLE/Event” tab choose [Submit CLE Event](#).

► TAPS 2019

SAVE THE DATE! The Texas Advanced Paralegal Seminar (TAPS) will be held in Austin on September 18–20, 2019. Be sure to save the date now and help us celebrate the 20th Anniversary of this fabulous event! This event offers up to 14 hours of CLE with excellent speakers and topics, fabulous socials, and superb networking opportunities with paralegals from across the State of Texas. Don't miss this event!

► Travel Overseas to Europe

The Paralegal Division is hosting a travel group to Europe (Bratislava & Budapest) on April 17–25, 2020. Travelers have all been educated on previous trips as well as forged friendships and enjoyed culture from around the world.

www.tbls-bcp.org

► TBLS – Paralegal Board Certification

Have you considered applying for Texas Board of Legal Specialization (TBLS) certification? There are currently fewer than 400 elite Board Certified Paralegals (BCP) in Texas. TBLS offers 9 specialty areas of laws to paralegals: Bankruptcy Law, Criminal Law, Civil Trial Law, Family Law, Estate Planning/Probate Law, Personal Injury Trial Law, Real Estate Law and Oil, Gas and Mineral Law. Visit www.tbls-bcp.org for more information.

► TBLS Helpful Hints Guide

The Paralegal Division developed a TBLS Helpful Hints Guide to prepare for and study for the Texas Board of Legal Specialization (TBLS) specialty certification exam(s) for paralegals. This Guide offers tips for each specialty area of law, along with general tips for taking the exam. It is created by PD leaders and available to members of the Paralegal Division. You can find it in the Members Only area at www.txpd.org.



► **Definition & Paralegal Standards Adopted by the State Bar of Texas Board of Directors**

In 2005, the State Bar Board of Directors unanimously approved standards for the previously approved paralegal definition. The standards will assist the public in understanding the paralegals' role in quality legal services, assist attorneys in the effective utilization of paralegals, and guide judges when awarding attorney fees. These standards are on the PD's and State Bar's websites. For more information, log onto www.txpd.org and view under "About PD/Paralegal Definition and Standards" or at this [link](#). The Paralegal Standards are also attached as an appendix to the Paralegal Division's Standing Rules.

► **Mentor Program**

The Paralegal Division's Mentor/Protégé Program is available! You don't need to be a student or new paralegal; if you are working in an area of law that is new to you and need a mentor in that area of law, take advantage of this wonderful benefit of membership. Please do not forget to reapply as a mentor or protégé each year. **Members can log in under "Members-Only" section on the PD website** to learn how to sign up to become a mentor or protégé of the program.

► **Membership Directory**

PD members are listed in the *Texas Legal Directory (the "Blue Book")*, as well as online at www.txpd.org in the **Members-Only** section of the website. As a member of the Paralegal Division, you may update your record to include your practice area(s) of law by choosing Members Only->Directory->Update My Profile on the PD website.

► **100 PD Club**

Law firms and legal departments with 100% of their paralegals enrolled as PD Members will qualify for the "100 PD Club" and receive recognition in the *TPJ*. For a questionnaire, please e-mail TPJ@txpd.org and type "100 PD Club" in the subject line.

► **PD Ambassadors**

PD Ambassadors are past PD Presidents who travel throughout the state, offer quality CLE and provide information about the PD. If your local organization is interested in having a presentation by a PD Ambassador, please contact Joncilee Davis, ACP, Chair of the Paralegal Division's Ambassador Ad Hoc Committee at Ambassador@txpd.org or find the form located on the PD website under "PD Speakers". *Note: PD will cover the travel expenses of an Ambassador coming to your area to speak (one time on an annual basis).*



► **The Texas Bar College (formerly, College of the State Bar of Texas)**

If you have never considered joining the Texas Bar College, please follow the [link](#) on the [PD website](#) and read all the great benefits that are offered, along with the prestige of being a member. Becoming a member of the Texas Bar College represents another aspect of your professional attainment. In order to be eligible, you must have a minimum of 12 hours of CLE, two of which **must** be in legal ethics or professional responsibility. By attending TAPS, you have the CLE credit needed!

► **Pro Bono College of the State Bar of Texas**

Paralegals may join the Paralegal Pro Bono College if they have performed a minimum of 50 hours of eligible pro bono services in addition to their normal work hours, without compensation, as stated in the membership requirements. To view guidelines and download an application, go to [Pro Bono College](#).

► **Pro Bono Opportunities**

The Paralegal Division has created a list of Pro Bono programs in Texas. If you would like to volunteer your time for a Pro Bono program, you can now find the list of available programs by accessing the "Membership" tab, and then choosing "[Pro Bono Programs](#)" from the drop down menu. To search the database, enter the County in which you work or live and a list of Pro Bono opportunities will appear on the screen. Help us keep it up to date by letting us know if a new program is developed or information changes!

For additional pro bono opportunities, you may also sign up at Texas Lawyers Help via their website at www.texaslawyershelp.org. Texas Lawyers Help is a website for pro bono lawyers and legal services staff. The website contains password-protected resources to help attorneys provide free legal services to low income Texans. Free membership to TexasLawHelp.org is available to staff of Texas-based programs funded by LSC or the Texas Equal Access to Justice Foundation, and Texas attorneys and **paralegals who are interested in volunteering with a Texas pro bono program**.

Information on other pro bono efforts can be found on the State Bar of Texas TexasLawyersHelp website (join in order to receive information on how you can provide pro bono services). You may also access at www.txpd.org and choose from the buttons on the right hand of the home page.



► Keep Track of Your Pro Bono or CLE Hours

As a Member of the Paralegal Division (PD), you can track your pro bono hours as well as your CLE hours in your individual member record on the PD website. This repository can be a very helpful tool in managing both your pro bono and continuing legal education (CLE) hours. The Paralegal Division can also use this tool to tabulate and report on the pro bono efforts of its members to the State Bar of Texas. Add or view your Pro Bono volunteer history by logging into the website, and then choose Directory, and choose either **View My Pro Bono Records** or **View My CLE Records**, and sign-in. To enter the hours for either Pro Bono or CLE, click on “**Add a Pro Bono (or CLE) Item to Your History.**” *Members can now add their CLE attendance hours using the new [Paralegal Division App!](#)*

► MyTexasBar.com

This is a wonderful tool made available by the State Bar of Texas through PD membership. The MyTexasBar page provides legislative tracking, form access, notification of TexasBarCLE opportunities, access to both CaseMaker and FastCase at no charge, and much more. This tool makes your paralegal skills look great to your attorneys! To access this page, go to www.texasbar.com and click on *My Bar Page*. Must be a member of the Paralegal Division to access “MyBarPage.”

► PD E-Group

The PD offers its members the benefit of the PD E-Group! Postings are distributed immediately upon entry and answers to your queries are provided by your peers. Members of the PD E-Group enjoy ready access to paralegals throughout Texas with a rich body of experience and expertise in the many different practice areas of the law. Other benefits offered by the e-group include: statewide networking, access to information on vendors throughout Texas, sharing of forms, expertise in areas of law outside your own practice area, identification of hard to find subject matter experts, just to name a few. Note: You must sign up for the PD E-Group through the **Members-Only** area at www.txpd.org. Membership in the Division does not automatically include enrollment in the PD E-Group.

► The Paralegal Ethics Handbook

The Paralegal Ethics Handbook, 2019 ed., (to be published in the fall), will be the newest edition and serves as a resource that addresses ethical considerations for 17 practice areas, as well as consideration for in-house, corporate, freelance, administrative, governmental, and regulatory law paralegals. This resource is used in offices and education programs both statewide and nationally. Order your copy [here](#).

► “Paralegal Pulse” E-Newsletter

This monthly e-newsletter is e-mailed to members and highlights the various events and happenings of the PD. A new feature of the *Pulse* is a random question that can net you a prize donated by one of our Sustaining Members. If you have not received your monthly e-newsletter notification, please contact pd@txpd.org to check your e-mail address on file or to see whether we need to be added to your non-junk/safe list.

► PD Job Bank

The Job Bank is accessible only to PD members. Job postings are for positions throughout the State of Texas. Members may post jobs for their firms and corporations through this site, free of charge. To post a job, please go to www.txpd.org, access the Members Only area, sign in with your membership number and password, choose “**Job Bank**” and then choose “**Add a Job**”.

Law Firms and Companies may also post a paralegal job vacancy to the PD Job Bank at www.txpd.org under **Contact/Job Bank Submissions**.

► Texas Paralegal Journal

The Texas Paralegal Journal is the official quarterly magazine of the Paralegal Division of the State Bar of Texas. It offers useful articles on various areas of substantive law, practice tips, information on controversial issues at hand in the state, tips on technology, various events scheduled or those having occurred, announcements about the successes of our members, and an ethics column. Check out the [new digital version!](#)

► Texas Bar Journal

This is the monthly publication of the State Bar of Texas for attorneys which includes current statewide matters and events. This benefit allows you access to the same information being received by your attorneys.

▶ **PD Blog.**

Don't miss the Paralegal Division's Blog. We are excited to bring you another way to stay current on all of the events and benefits that the Paralegal Division brings you. Please visit the Blog at <http://blog.txpd.org> or click on the "BLOG.TXPD.ORG" on the PD website, www.txpd.org.



▶ **PD Social Networking**

The Paralegal Division is on **Twitter**, **Facebook**, and **LinkedIn**. Search "Paralegal Division" in **Twitter** and **Facebook** or "Texas Paralegal Division" on **LinkedIn** to find us or click the icons on the PD home page, www.txpd.org.

▶ **Members Eligible for Health Insurance**

State Bar of Texas officials announced the Texas Bar Private Insurance Exchange available to members of the Bar, including Paralegal Division members. The Exchange is a multi-carrier private exchange exclusively designed for members and their dependents. It offers a comprehensive suite of products including dental, vision, disability, life, accident, wellness and more at very competitive prices. For more information on this benefit, go to www.memberbenefits.com/texasbar. **Members must maintain their membership in the PD in order to qualify for this benefit, so ensure that you timely renew your membership each year.**

▶ **Additional Perks for your \$\$**

- Active Members receive a membership certificate suitable for framing and displaying in your office. We encourage our members to proudly display such certificate, as it is symbolic of your professionalism and involvement in your professional organization;
- Discounts on CLE seminars and webinars sponsored by the PD and many State Bar of Texas CLE programs (notably the Texas Paralegal Advanced Seminar and District CLE seminars);
- Notification of continuing legal education courses offered by the State Bar of Texas by signing up at *My Bar Page*;
- Non-voting membership in State Bar of Texas sections, upon payment of section dues;
- Participation in [State Bar activities and benefits](#), including health, life, and dental insurance programs and credit unions (contact the State Bar Insurance Trust at 1-800-460-7248 or visit their website at www.sbotit.com);

Car Rental discounts;

- Car and Home Insurance offered through the State Bar of Texas
- State networking through involvement/service on state-wide committees;
- Professional recognition;
- Communication and promotion of professional conduct and responsibility;
- Continued individual and professional growth as a paralegal; and
- Sense of fulfillment that comes from being involved in the direction of the paralegal profession.

Log on to www.txpd.org for more information on the Paralegal Division!



KEEP YOUR CLE (CERTIFICATES)

Our wonderful Member Renewal Spot Audit Committee Chair, Deb Pointer, has gone above and beyond to help our members keep credit for their CLE's when they can't find their certificates. You can help simplify her job by following the "Pointers" listed below:

- Request a certificate if one is not given to you at the CLE event
- Fill out the certificates
- Keep the certificate
- Regularly update your CLE records on the PD website (www.txpd.org—got to Members Only—Manage My CLE Records and log your CLE credits)
- Keep a copy of your renewal application
- Keep a hard copy and an electronic copy of your CLE certificates and renewal applications as a back up for 2 years just in case
- Consider employing the use of a USB (or thumb) drive to keep the electronic version of your certificates so they stay separate and avoid system/computer crashes
- Download and save the certificate immediately after completing an online CLE
- Keep the hard copies of your certificates in a place away from your other work papers so they don't get mixed up and lost

Deb is not a "Scrubbing Bubble;" in other words, we don't want her to "work hard so we don't have to." Remember, spot audits are random and it is YOUR responsibility to keep proof of your CLE attendance. We all keep track of everything every day at our offices (right?!) so this should be easy! Don't lose CLE credit hours you earned—Keep Your CLE (Certificates)!

Contact Deb Pointer, Member Renewal Spot Audit Committee Chair, at MRC@txpd.org with any comments or questions



Happy
TEXAS
PARALEGAL
DAY
OCTOBER 23

"THROUGH THEIR EXCEPTIONAL TALENTS AND EXPERTISE, PARALEGALS PROVIDE VALUABLE SERVICES THAT CONTRIBUTE SIGNIFICANTLY TO THE EFFICIENT FUNCTIONING OF THE JUDICIAL SYSTEM IN THE LONE STAR STATE, AND THEY ARE INDEED WORTHY OF SPECIAL RECOGNITION."



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Paralegal Division
Utilization and Compensation Survey

Salary Survey for Texas Paralegals
The Salary Survey is available starting January 15, 2020 until 5:00 pm CST February 15, 2020.

Please share this email with all paralegal colleagues.

Take the Survey for a Chance to Win 1 of 5 \$100 Visa Gift Cards!
Sponsored by The Center for Advanced Legal Studies

The Paralegal Division's Utilization and Compensation Survey of paralegals in Texas is coming soon! The information from this survey will be used to generate reports that will allow paralegals in Texas to see how their compensation packages compare to others in their geographic region.

Questions cover educational backgrounds, work environments, duties and responsibilities, billing and salary levels, and regional demographics affecting paralegal utilization and compensation. Participation in the convenient "scroll-and-click" survey is totally anonymous. Each question can be answered by simply checking a response or filling in a blank. The survey is open to all paralegals – not just members of the State Bar of Texas Paralegal Division. Please participate and tell others of this opportunity. By completing the survey you are helping the Paralegal Division to provide the most accurate and up-to-date information.

Please complete this survey by **February 15, 2020.**

Thank you for your participation. This information will provide summary demographic information about paralegal work, compensation, benefits, and job satisfaction in Texas. The survey findings will be summarized and published on our website after completion.

For more information, please contact Edna Garza-Guerra, TBLS-BCP at president-elect@txpd.org.

Sponsored by the Center for Advanced Legal Studies
800 W Sam Houston Parkway
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Phone: 713-529-2778
Toll Free: 1-800-446-6931
<https://www.paralegal.edu>



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ASSOCIATE MEMBERSHIP



Join forces with an elite group of lawyers and paralegals who lead our profession.

Through associate member status, the College honors paralegals that make a commitment to maintain and enhance their professional skills through attending an extraordinary amount of continuing legal education hours.

REQUIREMENTS

A paralegal may become, or may maintain his or her status as an associate member of the College by

- (1) completing twelve hours of accredited CLE in the previous OR current calendar year which must include two hours of ethics,
- (2) paying the required fee,
- (3) submitting an application form on which a licensed Texas attorney verifies the applicant's good character and qualifications as a paralegal, and
- (4) submitting a report identifying the sponsor of the CLE programs attended, the specific topics included, the names and firms of speakers on the programs.

Two of the twelve hours including one hour of ethics may be earned through self-study.

BENEFITS

- A certificate of membership suitable for framing and a leather portfolio with the College logo
- The distinction of attaining a higher level of professional membership
- Unlimited access to TexasBarCLE's Online Library, a searchable database of over 27,000 CLE articles, forms, and case law updates
- Discounts for many live and video replay courses through TexasBarCLE, the State Bar's award-winning CLE department
- Use of the College logo on business cards, websites, letterhead, email signatures, etc.

To join, visit texasbarcollege.com.

TEXAS BAR COLLEGE

PROFESSIONALISM THROUGH EDUCATION

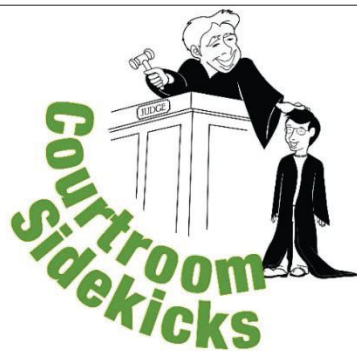


For over 20 years the Registered Paralegal (RP®) credential has meant the highest level of professional competency. What's behind your name?



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Trial Boards

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**GOOD LUCK
TO THOSE
PARALEGALS
TAKING THE
TBLS EXAM ON
NOVEMBER
9TH!!**



PARALEGALS GO TO Bratislava and Budapest

April 17 – April 25, 2020
(Eight Days and Seven Nights)

FRI, April 17, 2020 -- Depart from the USA to Vienna.

SAT, April 18, 2020 (Bratislava) – Arrive in Vienna, meet your expert Tour Manager and transfer to the historic and lovely Bratislava, the capital city of Slovakia, where you'll check-in to your hotel and start exploring. (D)

SUN, April 19, 2020 (Bratislava) – Enjoy a walking tour with your Tour Manager this morning exploring the pedestrian-friendly medieval and Gothic old town nestled along the river. You'll have the balance of the day to continue exploring on your own! (B)

MON, April 20, 2020 (Bratislava) – Today you'll enjoy an excursion to Eisenstadt, Austria, capital of Burgenland. Your guide will take you on a walking tour which includes entrance to the grand Esterhazy Palace where you'll discover its treasures and beautiful gardens. Lunch will be included today, and then you'll enjoy some free time before returning to Bratislava. (B,L)

TUE, April 21, 2020 (Budapest) – Depart Slovakia this morning and continue your journey to Hungary. Today's destination is Budapest, also known as the Pearl of the Danube. This evening enjoy a cruise on the Danube. (B,D)

WED, April 22, 2020 (Budapest) – Meet your local guide for a sightseeing tour of Budapest where you'll learn about the amazing 1,000-year history of this city, split in half by the Danube River—the Buda district on one side and the Pest district on the other (hence the city's name!). See Heroes' Square, St. Stephen's Basilica, and the spectacular Hungarian Parliament building, then cross the famous Chain Bridge to take in wonderful views from the neo-Roman Fisherman's Bastion, and enjoy entrance to Matthias Church. The afternoon is free to perhaps visit the Great Market Hall or reflect on the atrocities of the fascist and communist regimes at the powerful House of Terror museum. (B)

THU, April 23, 2020 (Budapest) – This morning enjoy an excursion to Gödöllo Royal Palace, an imperial and royal palace completed in the 1760s and known for being a favorite of Queen Elisabeth of Hungary (or more commonly known as Sissi). Farewell dinner this evening. (B,D)

FRI, April 24, 2020 (Budapest) – Today you'll enjoy an excursion outside of the capital where you'll experience small-town Hungary with visits to a couple of picturesque towns that may include Eger, Esztergom, Szentendre, and/or Szeged. Be on the lookout for castles, basilicas and lovely Baroque buildings. (B)

SAT, April 25, 2020 - Depart for the USA. (B)



FEE WITH AIR INCLUDED:

Register by August 1, 2019 and receive a \$100 Discount.
Fee is based on registration by December 1, 2019.

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Fee is based on registration by December 1, 2019.

Fees: Departing DFW – \$4,829; Houston \$4,889; Austin/San Antonio - \$4,909; Amarillo/Midland - \$4,969 (includes program fee). **Note:** Registrations after August 1 may include additional fuel surcharges that are finalized 45 days prior to departure; an invoice will be sent at that time if there are any increases. ***Other departure cities available upon request. Fees based on 20 persons and includes airfare, hotel, transportation, tours, and meals as indicated above.***

Additional/Optional fees: Single room supplement: \$665; Ultimate Protection Plan: \$270; Comprehensive Protection Plan: \$225; If the Ultimate or Comprehensive Plan is purchased there is a surcharge for guests ages 66+: \$100

LAND ONLY FEE: (*if you wish to make your own air travel arrangements*): \$3,409

PAYMENT SCHEDULE: **Deadline for registration is December 1, 2019;** Initial non-refundable deposit is \$200; second payment of \$1,000 is due October 1, 2019; third payment of \$1,000 is due on November 1, 2019, with balance due on December 1, 2019. **Non-payment of required on-time monthly payments will result in trip cancellation.**

MAKE IT EASY ON YOURSELF! SIGN UP FOR AUTO PAYMENTS: Automatic Payments plan available. Automatic Payments makes planning your trip budget easy because your payments are spread out evenly, giving you more time to pay. You choose a payment frequency (every 2 weeks, every 4 weeks, monthly, or quarterly) and your payments are automatically deducted from your checking or savings account. **Travelers who use autopay will be given a \$50 discount.** Automatic Payments are available for all registered participants in "My Account:" at www.acis.com/accounts.

So, if you register by August 1 and use auto-pay you can save \$150.00!

EXTENSION: To extend stay at the end of the trip, an Alternate Request Form must be completed (found at https://www.acis.com/cmsfiles/file/Alt_Return_Form.pdf) and returned to ACIS at least 90 days prior to your trip's departure. There will be an additional fee of \$175 for this extension, plus any additional airline ticket costs.

REGISTER at <http://www.acis.com/register> choose **Participant** from the drop-down menu and sign in using: **Group Leader ID: 46775- Group Leader's Last Name: Brashears** - Click on the appropriate circle for your departure city for the **"Bratislava/Budapest Trip"** trip and fill in your information.





MENTOR PROGRAM

BE A MENTOR | HAVE A MENTOR

Protégés:

- Receive guidance/direction/support on topics such as ethics, career advancement, & professionalism.
- Access to valuable networking opportunities with other paralegals and the legal community through your mentors and others at state-wide and district PD events.
- Opportunities to learn more about the PD and PD activities & opportunities to get more involved.

Mentors:

- Opportunity to share your guidance/direction/support on topics such as ethics, career advancement, & professionalism.
- Encourage and promote the Division, and opportunities to participate in the Division.
- Invite Protégés to attend Division functions, and introduce Protégés to Division leadership, as well as some of the members.

*Voting, active members in good standing, with at least seven (7) years of experience as a paralegal, are qualified to serve as Mentors. Mentors must complete the requisite application acknowledging Mentor has read and agrees to follow the Mentor Program Guidelines.

SIGN UP TODAY

For more information contact:
mentorprogram@txpd.org