

GUIDELINE

**THESE ARE ONLY GENERAL GUIDELINES
REMEMBER: IF YOU HAVE ANY QUESTIONS OR COMMENTS ABOUT
YOUR DUTIES OR RESPONSIBILITIES, ALWAYS ASK THE RESPONSIBLE
ATTORNEY. DO NOT GUESS IF YOU ARE UNSURE AS TO HOW TO PROCEED.**

DO NOT GUESS IF YOU ARE UNSURE AS TO HOW TO PROCEED.

BOOKLET HANDLING AND PROCESSING

PURPOSE: This guideline outlines how to handle and process booklets for use by our clients and ourselves.

CROSS REFERENCES:

NOTE: THE LAW AND THE FLORIDA BAR RULES OF PROFESSIONAL CONDUCT REGARDING THESE MATTERS MAY CHANGE. IT IS THE RESPONSIBILITY OF THE ATTORNEY TO ALWAYS VERIFY THE PROCESS AND LAW CITED COMPLY WITH THE CURRENT LAW AND THE FLORIDA BAR RULES OF PROFESSIONAL CONDUCT.

TABLE OF CONTENTS/REFERENCE GUIDE

(Hover over specific section heading and hold CTRL and click to go directly to relevant page)

Section

Page

The table of contents is empty because you aren't using the paragraph styles set to appear in it.

[PREPARE INTRODUCTION AND THEN LIST EACH BOOKLET SEPARATELY WITH INFORMATION ON EACH AS LISTED BELOW]

I. INTRODUCTION

A. Purpose of Booklets

Booklets are sent with Client Letters as the case progresses in order to provide the Client with reference guides they may use to review information discussed with their attorney or case manager. Booklets will provide general answers about how a typical case may proceed, allowing clients to focus on asking specific questions relevant to their individual case.

B. Updating the Booklets

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It is important to make sure that all booklets are up to date and current. The most current version of the booklet will be available in the Pleadings Tab in JBA-GUIDELINES. All booklets will be filed under 'BOOKLETS' in the Party tab. Each booklet is also available as a template, filed under the Ancillary tab. The most current version should be available in both the original template and the version located under the Pleadings Tab. Furthermore, all booklets will state the Client Letter(s) to which they are attached. Make sure that an appropriate, updated booklet is attached to the corresponding client letter. If there is a discrepancy, review both the original template and the Pleadings tab version to find the most current version.

C. Booklet Categories

Some booklets are used in multiple client letters. For example, the Mediation Preparation Booklet is used in Personal Injury cases and Employment cases. The booklet is the same, but needs to be attached to the appropriate client letter, which will be located under its corresponding Category.

Additionally, a client letter may call for more than one booklet to be attached. Review that the appropriate booklets are attached to the client letter and updated before sending.

II. BOOKLET.EL.FLSA.UNPAID WAGES AND OVERTIME FAQ

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

- 1. **L.C.CFA EXECUTED.EMPLOYMENT (FLSA) WITH QUESTIONNAIRE, BOOKLET, AND SURVEY.**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for Employment Claims dealing with FLSA. This booklet answers frequently asked questions regarding the client's case, including 1) an overview of the case 2) investigating and evaluating the case 3)

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settlement negotiations 4) litigation procedures 5) addresses damages and 6) provides material for the client's reference.

- D. This letter should be sent to the client within ____ days after the client retains our firm.

III. BOOKLET.EL.FMLA.UPAID WAGES AND OVERTIME FAQ

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letters:
1. **L.C.CFA EXECUTED.EMPLOYMENT (FMLA) WITH QUESTIONNAIRE, BOOKLET, AND SURVEY.**
 2. **L.C.CFA EXECUTED.EMPLOYMENT (OTHER) WITH QUESTIONNAIRE**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for Employment Claims dealing with FMLA. This booklet answers frequently asked questions regarding the client's case, including 1) an overview of the case 2) investigating and evaluating the case 3) settlement negotiations 4) litigation procedures 5) addresses damages and 6) provides material for the client's reference.
- D. This letter should be sent to the client within ____ days after the client retains our firm.

IV. BOOKLET.EL.DEMAND SETTLEMENT NEGOTIATIONS DISABILITY DISCRIMINATION

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:
1. **L.C.DEMAND.EL.DISABILITY DISCRIMINATION**

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It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for Employment Claims dealing with disability. This booklet answers frequently asked questions regarding the client's demand for settlement including 1) an overview of demand/settlement process 2) investigating and evaluating the case 3) settlement negotiations 4) litigation procedures 5) damages and 6) further material for the client's reference.
- D. This letter should be sent to the client within ____ days after the client retains our firm.

V. BOOKLET.EL.DEMAND SETTLEMENT FLSA

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

1. **L.C.DEMAND.EL.FLSA. DRAFT FOR REVIEW AND APPROVAL WITH BOOKLET**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for Employment Claims dealing with FLSA. This booklet answers frequently asked questions regarding the client's demand for settlement including 1) an overview of demand/settlement process 2) investigating and evaluating the case 3) settlement negotiations 4) litigation procedures 5) damages and 6) further material for the client's reference.
- D. This letter should be sent to the client within ____ days

VI. BOOKLET.EL.DEMAND SETTLEMENT NEGOTIATIONS FMLA

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.

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- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

1. **L.C.DEMAND.EL.1981 USERRA.DRAFTROFOR REVIEW AND APPROVAL WITH BOOKLET**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for Employment Claims dealing with FMLA. This booklet answers frequently asked questions regarding the client's demand for settlement including 1) an overview of demand/settlement process 2) investigating and evaluating the case 3) settlement negotiations 4) litigation procedures 5) damages and 6) further material for the client's reference.
- D. This letter should be sent to the client within ____ days

VII. **BOOKLET.EL.DEMAND SETTLEMENT NEGOTIATIONS RACE DISCRIMINATION**

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

1. **L.C.DEMAND.EL.RACE DISCRIMINATION**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for Employment Claims dealing with race discrimination. This booklet answers frequently asked questions regarding the client's demand for settlement including 1) an overview of demand/settlement process 2) investigating and evaluating the case 3) settlement negotiations 4) litigation procedures 5) damages and 6) further material for the client's reference.
- D. This letter should be sent to the client within ____ days

VIII. **BOOKLET.EL.DEMAND SETTLEMENT NEGOTIATIONS WHISTLEBLOWER
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- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

- 1. **L.C.DEMAND.EL.WHISTLEBLOWER.DRAFT FOR REVIEW AND APPROVAL WITH BOOKLET**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for Employment Claims dealing with the Whistleblower Act. This booklet answers frequently asked questions regarding the client's demand for settlement including 1) an overview of demand/settlement process 2) investigating and evaluating the case 3) settlement negotiations 4) litigation procedures 5) damages and 6) further material for the client's reference.
- D. This letter should be sent to the client within ____ days

IX. BOOKLET.PI.MOTOR VEHICLE ACCIDENT FAQ

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent

- C. This booklet provides information for motor vehicle injury claims, including 1) the typical process for pursuing a motor vehicle claim, 2) special considerations for motor vehicle claims.
- D. This letter should be sent to the client within ____ days after the client retains our firm.

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X. BOOKLET.PI.NURSING HOME ABUSE AND NEGLECT FAQ

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:.

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent

- C. This booklet provides information for nursing home abuse and neglect claims, including 1) the typical process for pursuing a nursing home claim, 2) special considerations for the elderly.
- D. This letter should be sent to the client within ____ days after the client retains our firm.

XI. BOOKLET.PI.DEMAND SETTLEMENT NEGOTIATIONS

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letters: (There appears to be slight variations between the Demand/Settlement Booklet included in each L.C. Should there be separate booklets for different categories?)

1. **L.C.DEMAND.IC.FIRE.DRAFT FOR REVIEW AND APPROVAL WITH BOOKLET**
2. **L.C.DEMAND.IC.LIFE.DRAFT FOR REVIEW AND APPROVAL WITH BOOKLET**
3. **L.C.DEMAND.IC.SINKHOLE.DRAFT FOR REVIEW AND APPROVAL WITH BOOKLET**
4. **L.C.DEMAND.IC.WATER.DRAFT FOR REVIEW AND APPROVAL WITH BOOKLET**
5. **L.C.DEMAND.PI.DRAFT FOR REVIEW AND APPROVAL WITH BOOKLET**
6. **L.C.DEMAND.PI.FINAL FOR REVIEW AND FILES WITH DEMAND, NEGOTIATIONS, AND SETTELEMENT BOOKLET**

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It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for demand/settlement negotiations. It includes information regarding 1) the demand letter 2) counter offers and negotiating with the defendant 3) and the benefits of settlement.
- D. This letter should be sent to the client _____.

XII. BOOKLET.PI.EXAMINATION UNDER OATH PREPARATION

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

1. **L.C.EXAMINATION UNDER OATH (EUO) FOR PIP ONLY SCHEDULED, PREPARATION RECOMMENDATIONS, AND STATUS OF CASE**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet answers frequently asked questions about trial. It provides a general guide to 1) the typical EUO procedure, 2) dress code for EUO, 3) tips for how the client should conduct themselves during the EUO and 4) how they should testify.
- D. This letter should be sent to the client once the EUO is scheduled, within ____ days.

XIII. BOOKLET.PI.MEDIATION PREPARATION

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letters:

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2. **L.C.MEDIATION.DATE, TIME, SUMMARY, AND BOOKLET.PI.**
3. **L.C.MEDIATION.DATE, TIME, SUMMARY (INSURANCE)**
4. **L.C.MEDIATION.DATE, TIME, SUMMARY, AND BOOKLET (EMPLOYMENT)**
5. **L.C.NEUTRAL EVALUATION.SUMMARY AND BOOKLET (Is this different from a standard mediation and specific to certain claims? Should it be a unique booklet?)**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent

- C. This booklet answers frequently asked questions about mediation. The booklet provides a general guide to 1) the typical mediation process, 2) dress code for mediation, 3) tips for how the client should conduct themselves during mediation and 4) how they should testify.
- D. This letter should be sent to the client once mediation is scheduled, within _____ days.

XIV. BOOKLET.PI.DEPOSITION PREPARATION

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letters:
 1. **L.C.DEPOSITION SCHEDULED, PREPARATION RECOMMENDATIONS, AND STATE OF CASE WITH BOOKLET (EMPLOYMENT)**
 2. **L.C.DEPOSITION SCHEDULED, PREPARATION RECOMMENDATIONS, AND STATUS OF CASE WITH BOOKLET**
 3. **L.C.DEPOSITION SCHEDULED, PREPARATION RECOMMENDATIONS, AND STATUS OF CASE**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet answers frequently asked questions about the deposition. It provides a general guide to 1) the typical deposition process, 2) dress code for the deposition 3) tips for how the client should conduct themselves during the deposition and 4) how they should testify.
- D. This letter should be sent to the client once the deposition is scheduled, within ___ days.

XV. BOOKLET.PI.TRIAL PREPARATION

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category ‘BOOKLETS’.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:
 - 1. **L.C.TRIAL.DATE, TIME, SUMMARY, AND BOOKLET.PI.**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet answers frequently asked questions about trial. It provides a general guide to 1) the typical trial procedure, 2) dress code for trial, 3) tips for how the client should conduct themselves during the trial and 4) how they should testify.
- D. This letter should be sent to the client once the jury trial is scheduled, within ___ days.

XVI. BOOKLET.SS.SOCIAL SECURITY FAQ

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category ‘BOOKLETS’.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:
 - 1. **L.C.ATR EXECUTED-SOCIAL SECURITY WITH BOOKLET AND SURVEY.**

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found

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in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for clients with Social Security Claims. This booklet answers frequently asked questions regarding the client's case, including 1) Correspondence between the client and the firm, 2) Overview and timeline of a typical Social Security case 3) Special concerns pertinent to Social Security cases.
- D. This letter should be sent to the client within ____ days after the client retains our firm.

XVII. BOOKLET.SS.SOCIAL SECURITY ADMINISTRATIVE HEARING PREPARATION

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

1. L.C.ADMINISTRATIVE HEARING DATE, PROCESS, AND BOOKLET.

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for clients to prepare for their Social Security Administration Hearing. This booklet answers frequently asked questions regarding the client's case, including 1) The typical process of a Social Security Administration Hearing, 2) how to prepare for a Social Security Administrative Hearing and 3) guidelines for testimony during a Social Security Administrative Hearing.
- D. This letter should be sent to the client when the client's Social Security Administrative Hearing is scheduled, within ____ days.

XVIII. SOCIAL SECURITY COMPULSORY MEDICAL EXAMINATION BOOKLET

- A. This booklet is available in Trialworks under JBA-GUIDELINES. Select the Pleadings Tab and then select under the Party category 'BOOKLETS'.
- B. Make sure that an updated copy of this Booklet is attached to the following client letter:

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1. L.C. COMPULSORY MEDICAL EXAM DATE AND TIME

It is important to make sure all information in this client letter has been updated to match the current copy found in the Pleadings Tab. If the booklet attached to the client letter needs to be updated to match the current version found in the Pleadings Tab, please do so. Remember to update the Table of Contents to make sure all page numbers are consistent.

- C. This booklet provides information for clients to prepare for their Compulsory Medical Examination. This booklet answers frequently asked questions regarding the compulsory medical examination, including how it may progress and important considerations regarding what information to tell the doctor.
- D. This letter should be sent to the client when the client's Compulsory Medical Exam is scheduled, within ____ days.

BOOKLET.EL.UNPAID WAGES AND OVERTIME SPREADSHEET