

# PRACTICE MANAGEMENT RESOURCES ON THE WEB

## Oregon State Bar – Professional Liability Fund – American Bar Association

RESOURCE	WEB LINK
<p><b>AMERICAN BAR ASSOCIATION</b></p> <p>Law Practice Management Section</p> <p>Legal Technology Resource Center</p> <p>Periodicals, Web sites, Blogs, RSS Feeds, E-mail Discussion Groups, Researching Technology, etc.</p> <p>Technology FYIs</p>	<p><a href="http://www.abanet.org/lpm/home.shtml">http://www.abanet.org/lpm/home.shtml</a></p> <p><a href="http://www.abanet.org/tech/ltrc/">http://www.abanet.org/tech/ltrc/</a></p> <p><a href="http://www.abanet.org/tech/ltrc/fyidocs/technologyresearchfyi.html">http://www.abanet.org/tech/ltrc/fyidocs/technologyresearchfyi.html</a></p> <p><a href="http://www.abanet.org/tech/ltrc/fyidocs/">http://www.abanet.org/tech/ltrc/fyidocs/</a></p>
<p><b>ASSOCIATES</b></p>	<p>See Partnership/Of Counsel</p>
<p><b>CALENDARING AND TICKLING</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i></p> <p>Calendaring and File Tickling Systems</p> <p>Diary/Tickler Systems</p> <p>Docket Control Checklist</p> <p>Docket Sheet</p> <p>Follow-Up</p> <p>Mail Handling – Paper and Paperless Filing Systems</p> <p>Supplementary Local Rules</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Docketing &amp; Calendaring</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Docketing &amp; Calendaring</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Docketing &amp; Calendaring</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Docketing &amp; Calendaring</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Docketing &amp; Calendaring</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Mail Handling</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Docketing &amp; Calendaring</a></p>
<p><b>CLIENT AND CASE SCREENING</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i></p> <p>How to Handle Phone Inquiries from Potential Clients</p> <p>Make the Right Match: What If You Only Represented Clients You Like</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p> <p><a href="https://www.osbar.org/publications/bulletin/08jul/practice.html">https://www.osbar.org/publications/bulletin/08jul/practice.html</a></p>
<p><b>CLIENT COMMUNICATIONS</b></p> <p>Administrative Info Brochure</p> <p><i>A Guide to Setting Up and Running Your Law Office</i></p> <p>Billing Info Brochure</p> <p>Client Relations Checklist</p> <p>Client Service Questionnaire</p> <p>Disclaimers for E-Mail, Web sites, etc.</p> <p>E-Writing: tips 4 btr comm</p> <p>How You Can Eliminate Constant Telephone Interruptions</p> <p>Marketing with Firm Brochures</p> <p>Notice to Client re Theft of Computer Equipment</p> <p>Receipt (delivery from client)</p> <p>The E-Mail Blizzard</p> <p>Transmittal</p> <p>Using E-Mail in the Office</p> <p>Using Voicemail in the Office</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a></p> <p><a href="https://www.osbar.org/publications/bulletin/08may/legalwriter.html">https://www.osbar.org/publications/bulletin/08may/legalwriter.html</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Communication</a></p> <p><a href="http://www.osbar.org/publications/bulletin/09apr/practice.html">http://www.osbar.org/publications/bulletin/09apr/practice.html</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Communication</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Communication</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Communication</a></p>

**PRACTICE MANAGEMENT RESOURCES ON THE WEB**  
**Oregon State Bar – Professional Liability Fund – American Bar Association**

RESOURCE	WEB LINK
<p><b>CLOSING YOUR LAW OFFICE</b></p> <p>Checklists</p> <p>Law Office List of Contacts</p> <p><i>Plan Ahead: Are You Prepared for the Unthinkable?</i></p> <p><i>Planning Ahead: A Guide to Protecting Your Clients' Interests in the Event of Your Disability or Death</i></p> <p>Sample Letters to Clients</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Closing Your Law Office</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Closing Your Law Office</a></p> <p><a href="http://www.osbar.org/publications/bulletin/05jul/practice.html">http://www.osbar.org/publications/bulletin/05jul/practice.html</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Closing Your Law Office</a></p> <p>Also see: <a href="#">Selling a Law Practice and Retiring from a Law Practice</a></p>
<p><b>CONFLICT OF INTEREST SYSTEMS</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i></p> <p>Conflict Audit</p> <p>Conflict Avoidance – What you need to know about conflict of interest systems</p> <p>Conflict Disclosure and Consent Checklists</p> <p>Conflict Disclosure and Consent Letters</p> <p>Conflict of Interest Systems-Procedures</p> <p>Declined Prospect Information Sheet</p> <p>Disclosure Form ORPC 1 – Lawyer in Business w/ Client</p> <p>Ethics Opinion No. 2005-50 Conflicts – Office Sharers</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Conflicts of Interest</a></p> <p><a href="https://www.osbar.org/publications/bulletin/01july/myp.htm">https://www.osbar.org/publications/bulletin/01july/myp.htm</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Conflicts of Interest</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Conflicts of Interest</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Conflicts of Interest</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Conflicts of Interest</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Conflicts of Interest</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Conflicts of Interest</a></p>
<p><b>DEPARTING A FIRM</b></p> <p>Checklists, sample client letters, ethics opinions, etc.</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Departing a Firm</a></p> <p>Also see: <a href="#">Staff</a></p>
<p><b>DISASTER RECOVERY</b></p>	<p>See <a href="#">File Management, Backing Up and Protecting Data</a></p>
<p><b>DISENGAGEMENT</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i></p> <p>Disengagement letters</p> <p>How to Fire a Client: Do's and Don'ts When Ending Representation</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Disengagement Letters</a></p> <p><a href="https://www.osbar.org/publications/bulletin/07jul/practice.html">https://www.osbar.org/publications/bulletin/07jul/practice.html</a></p>
<p><b>ENGAGEMENT</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i></p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p> <p>Also see: <a href="#">File Management, Client Intake</a></p>
<p><b>ETHICS – GENERAL INFORMATION</b></p> <p>Bar Counsel Article Archive</p> <p><i>Ethical Oregon Lawyer</i></p> <p>Ethics Opinions</p> <p>Ethics Questions</p> <p>Oregon Rules of Professional Conduct</p> <p>Oregon Rules, Policies, and Regulations</p>	<p><a href="https://www.osbar.org/ethics/bulletinbarcounsel.html">https://www.osbar.org/ethics/bulletinbarcounsel.html</a></p> <p><a href="http://www.osbar.org/store/pub/pubcat.asp?action=view&amp;cat=Ethics">http://www.osbar.org/store/pub/pubcat.asp?action=view&amp;cat=Ethics</a></p> <p><a href="https://www.osbar.org/ethics/toc.html">https://www.osbar.org/ethics/toc.html</a></p> <p><a href="https://www.osbar.org/ethics">https://www.osbar.org/ethics</a></p> <p><a href="https://www.osbar.org/docs/rulesregs/orpc.pdf">https://www.osbar.org/docs/rulesregs/orpc.pdf</a></p> <p><a href="https://www.osbar.org/rulesregs/toc.html">https://www.osbar.org/rulesregs/toc.html</a></p>

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RESOURCE	WEB LINK
<p><b>FEES</b></p> <p>2008 Hourly Rates Survey  2007 Economic Survey  <i>A Guide to Setting Up and Running Your Law Office</i></p>	<p><a href="https://www.osbar.org/surveys_research/08hourlyratesurvey">https://www.osbar.org/surveys_research/08hourlyratesurvey</a>  <a href="https://www.osbar.org/docs/resources/07EconSurvey.pdf">https://www.osbar.org/docs/resources/07EconSurvey.pdf</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p>
<p><b>FILE MANAGEMENT</b></p> <p><b>General Information</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i></p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p>
<p><b>Backing Up and Protecting Data</b></p> <p>After Disaster Strikes: A Checklist  Application Service Providers  Do-It-Yourself Security: Help Keeping Your Data Safe  Easy to Use or Easy to Lose? How to Protect Mobile Devices  How to Backup Your Computer  Identity Theft Protection Resources  Managing Practice Interruptions  Protect Client Information from Identity Theft  Protecting Your Firm</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Disaster Recovery</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a>  <a href="https://www.osbar.org/publications/bulletin/09febmar/legalonline.html">https://www.osbar.org/publications/bulletin/09febmar/legalonline.html</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <i>In Brief</i>, then August 2008 issue  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <i>In Brief</i>, then August 2008 issue  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Disaster Recovery</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <i>In Brief</i>, then August 2008 issue  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Disaster Recovery</a></p>
<p><b>Client Intake</b></p> <p>Engagement Letters and Fee Agreements  Fee Agreement Compendium  New Client Information Sheet  New Client Information Sheet with Disclaimer  How to Handle Phone Inquiries from Potential Clients  How You Can Eliminate Constant Telephone Interruptions</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Engagement Letters</a>  <a href="http://www.osbar.org/store/pub/pubcat.asp?action=view&amp;cat=Law+Practice+Management">http://www.osbar.org/store/pub/pubcat.asp?action=view&amp;cat=Law+Practice+Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Client Relations</a></p>
<p><b>Declined Clients</b></p> <p>Declined Client Prospect Information Sheet  Nonengagement Letters</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Nonengagement Letters</a></p>
<p><b>File Closing and Retention</b></p> <p>Client Files Revisited  Disengagement Letters  Document Destruction  File Closing Checklist  File Retention</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Disengagement Letters</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <i>In Brief</i>, then June 2005 issue  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a></p>
<p><b>File Documentation</b></p> <p>Memo of Conversation  Memo of Conversation (I Said/They Said)</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a></p>

# PRACTICE MANAGEMENT RESOURCES ON THE WEB

## Oregon State Bar – Professional Liability Fund – American Bar Association

RESOURCE	WEB LINK
<p><b>Organization of Electronic Files</b></p> <p>Checklist for Imaging Client Files/Disposition of Originals Digital Signatures Is It Time To Go Paper-Less? Going Paperless? Ethical Considerations Mail Handling – Paperless Filing System Managing Client E-mail Our Paperless World Retention of Electronic Records Technology Tips - Using Acrobat 9 in the Law Office</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">In Brief</a>, then February 2009 issue  <a href="http://www.osbar.org/publications/bulletin/09apr/barcounsel.html">http://www.osbar.org/publications/bulletin/09apr/barcounsel.html</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Mail Handling</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Technology</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">In Brief</a>, then August 2008 issue</p>
<p><b>Organization of Paper Files</b></p> <p>Mail Handling – Paper Filing System Setting Up an Effective Filing System</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Mail Handling</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a></p>
<p><b>Providing Files to Clients</b></p> <p>Client Files Revisited Going Paperless? Ethical Considerations OSB Formal Ethics Opinion 2005-125</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a>  <a href="http://www.osbar.org/publications/bulletin/09apr/barcounsel.html">http://www.osbar.org/publications/bulletin/09apr/barcounsel.html</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">File Management</a></p>
<p><b>FINANCIAL MANAGEMENT</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i> Billing and Time Slips Cash Flow Worksheet (6 Month and 12 Month) Daily Time Sheets General Ledger Monthly Budget Portland Multnomah Business Tax Start-Up Budget</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Financial Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Financial Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Financial Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Financial Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Financial Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Financial Management</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Financial Management</a></p>
<p><b>LAW LIBRARY/LEGAL RESEARCH</b></p> <p><b>Books and Legal Research Tools</b></p> <p>BarBooks Online (OSB CLE Publications) Casemaker Information Casemaker Login <i>In Brief</i> (PLF Newsletter) Online Resources for Oregon Lawyers (main portal) <i>Oregon Statutory Time Limitations Handbook</i> State of Oregon Law Library Willamette Law Online</p>	<p><a href="http://www.osbar.org/legalpubs/BarBooksTeaser.html">http://www.osbar.org/legalpubs/BarBooksTeaser.html</a>  <a href="https://www.osbar.org/docs/casemaker/usersguide.pdf">https://www.osbar.org/docs/casemaker/usersguide.pdf</a>  <a href="https://www.osbar.org/secured/login.asp?">https://www.osbar.org/secured/login.asp?</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">In Brief</a>  <a href="https://www.osbar.org/resources/eresources.html">https://www.osbar.org/resources/eresources.html</a>  <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a>  <a href="http://www.oregon.gov/SOLL/">http://www.oregon.gov/SOLL/</a>  <a href="http://www.willamette.edu/wucl/journals/wlo/">http://www.willamette.edu/wucl/journals/wlo/</a></p>

# PRACTICE MANAGEMENT RESOURCES ON THE WEB

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RESOURCE	WEB LINK
<b>Courts (Oregon)</b> Appellate Decisions Circuit Court Websites & Calendars Court Forms Court Programs	<a href="http://www.publications.ojd.state.or.us/">http://www.publications.ojd.state.or.us/</a> <a href="http://www.ojd.state.or.us/courts/circuit/index.htm">http://www.ojd.state.or.us/courts/circuit/index.htm</a> <a href="http://www.ojd.state.or.us/forms/index.htm">http://www.ojd.state.or.us/forms/index.htm</a> <a href="http://www.ojd.state.or.us/programs/index.htm">http://www.ojd.state.or.us/programs/index.htm</a>
<b>Forms</b> BarBooks Online (OSB CLE Publications) PLF Forms	<a href="http://www.osbar.org/legalpubs/BarBooksTeaser.html">http://www.osbar.org/legalpubs/BarBooksTeaser.html</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a>
<b>Law Library Values</b> Law Library Values	<a href="http://www.osbar.org/docs/resources/libraryvalues09.pdf">http://www.osbar.org/docs/resources/libraryvalues09.pdf</a>
<b>Rules</b> Oregon Administrative Rules Oregon Rules of Appellate Procedure Oregon Rules of Civil Procedure Supplementary Local Rules Tax Court Rules Uniform Trial Court Rules	<a href="http://www.ojd.state.or.us/Web/OJDPublications.nsf/OAR?OpenView&amp;count=1000">http://www.ojd.state.or.us/Web/OJDPublications.nsf/OAR?OpenView&amp;count=1000</a> <a href="http://www.ojd.state.or.us/Web/OJDPublications.nsf/ORAP?OpenView&amp;count=1000">http://www.ojd.state.or.us/Web/OJDPublications.nsf/ORAP?OpenView&amp;count=1000</a> <a href="http://www.ojd.state.or.us/Web/OJDPublications.nsf/ORCP?OpenView&amp;count=1000">http://www.ojd.state.or.us/Web/OJDPublications.nsf/ORCP?OpenView&amp;count=1000</a> <a href="#">Practice Aids and Forms</a> , then <a href="#">Docketing &amp; Calendaring</a> <a href="http://www.ojd.state.or.us/Web/OJDPublications.nsf/TaxR?OpenView&amp;count=1000">http://www.ojd.state.or.us/Web/OJDPublications.nsf/TaxR?OpenView&amp;count=1000</a> <a href="http://www.ojd.state.or.us/programs/utcr/">http://www.ojd.state.or.us/programs/utcr/</a>
<b>Statutes</b> Legislative History Oregon Statutes Statutes – Miscellaneous links	<a href="http://arcweb.sos.state.or.us/banners/legis.htm">http://arcweb.sos.state.or.us/banners/legis.htm</a> <a href="http://www.leg.state.or.us/ors/">http://www.leg.state.or.us/ors/</a> <a href="http://www.osbar.org/resources/eresources.html">http://www.osbar.org/resources/eresources.html</a>
<b>MOVING A LAW OFFICE</b> Moving a Law Office Checklist	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Moving a Law Office</a>
<b>NONENGAGEMENT</b> <i>A Guide to Setting Up and Running Your Law Office</i> Sample nonengagement letters	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Books from the PLF</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Nonengagement Letters</a> Also see: <a href="#">File Management, Declined Clients</a>
<b>OFFICE MANUALS</b> <i>A Guide to Setting Up and Running Your Law Office</i> Office Manual Index and Policy Manual Index Procedure Manual Using Form Books	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Books from the PLF</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Office Manuals</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Office Manuals</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Office Manuals</a>
<b>OFFICE SHARING</b> Checklist for Creating a Work-For-Rent Agreement Office Sharing Ethics Opinions Office Sharing Guidelines	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Office Sharing</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Office Sharing</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Office Sharing</a>

**PRACTICE MANAGEMENT RESOURCES ON THE WEB**  
**Oregon State Bar – Professional Liability Fund – American Bar Association**

RESOURCE	WEB LINK
<b>OFFICE SYSTEMS AUDIT</b> Office System Audit	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Office System Audit</a>
<b>OPENING A LAW OFFICE</b> <i>A Guide to Setting Up and Running Your Law Office</i> Checklist for Opening a Law Office Choice of Entity Ethics Opinion 2005-49 – Disclosure of Entity Status Law Office Start-Up: Law Office on a Shoestring Lawyers as PCs, LLCs, and LLPs Opening an Office (article) Virtual Law Office	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Books from the PLF</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Opening a Law Office</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Entity Formation</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Entity Formation</a> <a href="https://www.osbar.org/publications/bulletin/08oct/practice.html">https://www.osbar.org/publications/bulletin/08oct/practice.html</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Entity Formation</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Opening a Law Office</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Opening a Law Office</a> Also see: <a href="#">Office Sharing and Partnership/Of Counsel</a>
<b>OSB SECTIONS</b> Law Practice Management Solo and Small Firm Practitioners Sections (General)	<a href="http://osblpms.homestead.com/">http://osblpms.homestead.com/</a> <a href="http://www.osbar.org/sections/ssfp.html">http://www.osbar.org/sections/ssfp.html</a> <a href="http://www.osbar.org/sections">http://www.osbar.org/sections</a>
<b>PARTNERSHIP/OF COUNSEL</b> Associate Agreement Checklist Ethics Opinions Of Counsel Relationships Partnership Agreement Checklist	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Partnership/Of Counsel</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Partnership/Of Counsel</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Partnership/Of Counsel</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Partnership/Of Counsel</a>
<b>PLF BOOKS</b> <i>A Guide to Setting Up and Running Your Law Office</i> <i>A Guide to Setting Up and Using Your Lawyer Trust Account</i> <i>Planning Ahead: A Guide to Protecting Your Clients' Interests in the Event of Your Disability or Death</i>	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Books from the PLF</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Books from the PLF</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Books from the PLF</a>
<b>PLF COVERAGE</b> Billing and Exemption Guide Disclaimers for E-Mail, Websites, etc. Disclosure of Potential Malpractice Excess Coverage Primary Coverage	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Billing and Exemption Guide (under Primary Coverage)</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Technology</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Disclosure of Potential Malpractice</a> <a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Excess Coverage</a> <a href="http://www.osbplf.org">www.osbplf.org</a> . See <a href="#">Billing and Exemption Guide</a> , <a href="#">Coverage Plan</a> , <a href="#">Policies and Guidelines</a> , and <a href="#">Request an Exemption under Primary Coverage</a> heading

**PRACTICE MANAGEMENT RESOURCES ON THE WEB**  
**Oregon State Bar – Professional Liability Fund – American Bar Association**

RESOURCE	WEB LINK
<p><b>PRACTICE-SPECIFIC MATERIALS</b></p> <p>BarBooks Online (OSB CLE Publications)</p> <p>CLEs – Multnomah Bar Association</p> <p>CLEs – Oregon State Bar</p> <p>CLEs – Oregon Law Institute</p> <p>CLEs – Professional Liability Fund*</p> <p>*There are many CLE providers. These are just a few.</p> <p><b>PLF Practice Aids and Forms</b></p> <p>Adoption</p> <p>Bankruptcy</p> <p>Business</p> <p>Conservatorships</p> <p>Construction Liens</p> <p>Contract Lawyering</p> <p>Criminal</p> <p>Domestic Relations</p> <p>Guardianships</p> <p>Immigration</p> <p>Litigation</p> <p>Probate and Estate Planning</p> <p>Real Property</p> <p>Workers Compensation</p>	<p><a href="http://www.osbar.org/legalpubs/BarBooksTeaser.html">http://www.osbar.org/legalpubs/BarBooksTeaser.html</a></p> <p><a href="https://www.mbabar.org/programlist.php">https://www.mbabar.org/programlist.php</a></p> <p><a href="http://www.osbarcle.org/">http://www.osbarcle.org/</a></p> <p><a href="http://www.lclark.edu/">http://www.lclark.edu/</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then –CLE  <a href="#">Online</a>, <a href="#">Programs on Audio</a>, <a href="#">Programs on Video</a>, or <a href="#">Upcoming Seminars</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a></p> <p>Also see: <a href="#">Law Library/Legal Research</a></p>
<p><b>PRODUCTS &amp; SERVICES</b></p> <p>Discount on WordPerfect Office X4</p> <p>2009 Oregon State Bar Products &amp; Services</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">News</a></p> <p><a href="https://www.osbar.org/adirectory/directoc.html">https://www.osbar.org/adirectory/directoc.html</a></p>
<p><b>PROTECTING YOUR CLIENTS</b></p> <p>Law Office List of Contacts</p> <p>Sample letters, agreements, and checklists</p> <p><i>Plan Ahead: Are You Prepared for the Unthinkable?</i></p> <p><i>Planning Ahead: A Guide to Protecting Your Clients' Interests in the Event of Your Disability or Death</i></p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Closing Your Law Office</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Closing Your Law Office</a></p> <p><a href="http://www.osbar.org/publications/bulletin/05jul/practice.html">http://www.osbar.org/publications/bulletin/05jul/practice.html</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a></p>
<p><b>RETIRING FROM LAW PRACTICE</b></p> <p>Checklist</p> <p>Resources</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Retiring from Law Practice</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Retiring from Law Practice</a></p>
<p><b>SELLING A LAW PRACTICE</b></p> <p>Checklist</p> <p>Resources</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Selling A Law Practice</a></p> <p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Selling A Law Practice</a></p>

# PRACTICE MANAGEMENT RESOURCES ON THE WEB

## Oregon State Bar – Professional Liability Fund – American Bar Association

RESOURCE	WEB LINK
<b>STAFF</b>	
ABA Model Guidelines for Utilization of Paralegals	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Appointments	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Chart of Professional Organizations for Staff	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Checklist for Departing Staff	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Confidentiality in the Law Office (w/ sample agreements)	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Delegation Memo	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Ethics for Legal Staff	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Finding Della	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
New Secretary Checklist	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
Reception Article and Reception Duties	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Staff</a>
<b>TECHNOLOGY</b>	
An Accelerating Trend: Case Law Just Wants to be Free	<a href="https://www.osbar.org/publications/bulletin/08may/legalonline.html">https://www.osbar.org/publications/bulletin/08may/legalonline.html</a>
Choices: Law Firm Billing and Accounting Software	<a href="https://www.osbar.org/publications/bulletin/08dec/practice.html">https://www.osbar.org/publications/bulletin/08dec/practice.html</a>
Cyber Solutions – Practice management tips for busy lawyers	<a href="https://www.osbar.org/publications/bulletin/02augsep/managing.html">https://www.osbar.org/publications/bulletin/02augsep/managing.html</a>
Debuts of Note: A roundup of new legal sites	<a href="https://www.osbar.org/publications/bulletin/08dec/legalonline.html">https://www.osbar.org/publications/bulletin/08dec/legalonline.html</a>
Fingerprints and Clusters: New Legal Search Tool Has Broad Potential	<a href="https://www.osbar.org/publications/bulletin/08apr/legalonline.html">https://www.osbar.org/publications/bulletin/08apr/legalonline.html</a>
First Look: Martindale-Hubbell Connected	<a href="https://www.osbar.org/publications/bulletin/08oct/legalonline.html">https://www.osbar.org/publications/bulletin/08oct/legalonline.html</a>
In Search of Symbiosis: Networking for Lawyers, Part II	<a href="https://www.osbar.org/publications/bulletin/08augsep/legalonline.html">https://www.osbar.org/publications/bulletin/08augsep/legalonline.html</a>
Listen Up: 10 Essential Podcasts for Lawyers	<a href="https://www.osbar.org/publications/bulletin/08nov/legalonline.html">https://www.osbar.org/publications/bulletin/08nov/legalonline.html</a>
Metadata – Danger or delight	<a href="https://www.osbar.org/publications/bulletin/06may/practice.html">https://www.osbar.org/publications/bulletin/06may/practice.html</a>
Metadata: Guarding Against the Disclosure of Embedded Information	<a href="http://www.osbar.org/publications/bulletin/07apr/barcounsel.html">http://www.osbar.org/publications/bulletin/07apr/barcounsel.html</a>
Resources for Mac Lawyers	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <a href="#">Practice Aids and Forms</a> , then <a href="#">Technology</a>
Social Networking Sites for Lawyers: Part I	<a href="https://www.osbar.org/publications/bulletin/08jul/legalonline.html">https://www.osbar.org/publications/bulletin/08jul/legalonline.html</a>
Super-Powered Websites Three New Sites Worth Perusing	<a href="https://www.osbar.org/publications/bulletin/08jun/legalonline.html">https://www.osbar.org/publications/bulletin/08jun/legalonline.html</a>
The Right Tools – Good software choices can lead to smoother operation	<a href="https://www.osbar.org/publications/bulletin/05may/practice.html">https://www.osbar.org/publications/bulletin/05may/practice.html</a>
Tips, Tools and Traps– Better productivity through technology	<a href="https://www.osbar.org/publications/bulletin/06apr/practice.html">https://www.osbar.org/publications/bulletin/06apr/practice.html</a>
Tips, Traps, and Resources	<a href="http://www.osbplf.org">www.osbplf.org</a> , then <i>In Brief</i> (a recurring column which often contains technology tips)
Tweet 16: 16 ways lawyers can use Twitter	<a href="https://www.osbar.org/publications/bulletin/09jan/legalonline.html">https://www.osbar.org/publications/bulletin/09jan/legalonline.html</a>
Top 10 Top 60: The Most Notable Legal Sites of 2007	<a href="https://www.osbar.org/publications/bulletin/08febmar/legalonline.html">https://www.osbar.org/publications/bulletin/08febmar/legalonline.html</a>
What's New on the Web?: A Roundup	<a href="https://www.osbar.org/publications/bulletin/08jan/legalonline.html">https://www.osbar.org/publications/bulletin/08jan/legalonline.html</a>
	Also see: <a href="#">File Management, Organization of Electronic Files and File Management, Backing Up and Protecting Data</a>



## PRACTICE MANAGEMENT RESOURCES ON THE WEB

### Oregon State Bar – Professional Liability Fund – American Bar Association

RESOURCE	WEB LINK
<p><b>TIME MANAGEMENT</b></p> <p><i>A Guide to Setting Up and Running Your Law Office</i> Reducing the Pressure, PLF CLE</p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Programs on Audio</a> or <a href="#">Programs on Video</a></p>
<p><b>TRUST ACCOUNTING</b></p> <p>25 Ways to Protect Your Firm From Embezzlement Accepting Credit Cards <i>A Guide to Setting Up and Using Your Lawyer Trust Account</i> Client Ledger Card and Trust Journal Ethics Opinion 2005-48 Unclaimed Funds Ethics Opinion 2005-145 Trust Account Cushions Ethics Opinion 2005-149 Fee Disputes Ethics Opinion 2005-151 Fixed Fees Ethics Opinion 2005-172 Credit Cards Frequently Asked Trust Account Questions IOLTA Accounts Notice of Enrollment to OLF re IOLTA Account Oregon Rules of Professional Conduct <i>SO YOU THINK... Your IOLTA Account is Safe from Identity Theft, right?</i> Trust Accounting Trust Account Reconciliation <i>Trust Accounts and the FDIC</i> <i>Waiting for Go Dough</i></p>	<p><a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Books from the PLF</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbar.org/ethics/toc.html">http://www.osbar.org/ethics/toc.html</a> <a href="http://www.osbar.org/ethics/toc.html">http://www.osbar.org/ethics/toc.html</a> <a href="http://www.osbar.org/ethics/toc.html">http://www.osbar.org/ethics/toc.html</a> <a href="http://www.osbar.org/ethics/toc.html">http://www.osbar.org/ethics/toc.html</a> <a href="http://www.osbar.org/ethics/toc.html">http://www.osbar.org/ethics/toc.html</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbar.org/docs/rulesregs/orpc.pdf">http://www.osbar.org/docs/rulesregs/orpc.pdf</a> <a href="http://www.osbar.org/publications/bulletin/05dec/barcounsel.html">http://www.osbar.org/publications/bulletin/05dec/barcounsel.html</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbplf.org">www.osbplf.org</a>, then <a href="#">Practice Aids and Forms</a>, then <a href="#">Trust Accounting</a> <a href="http://www.osbar.org/publications/bulletin/08oct/barcounsel.html">http://www.osbar.org/publications/bulletin/08oct/barcounsel.html</a> <a href="http://www.osbar.org/publications/bulletin/06jun/barcounsel.html">http://www.osbar.org/publications/bulletin/06jun/barcounsel.html</a></p>

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