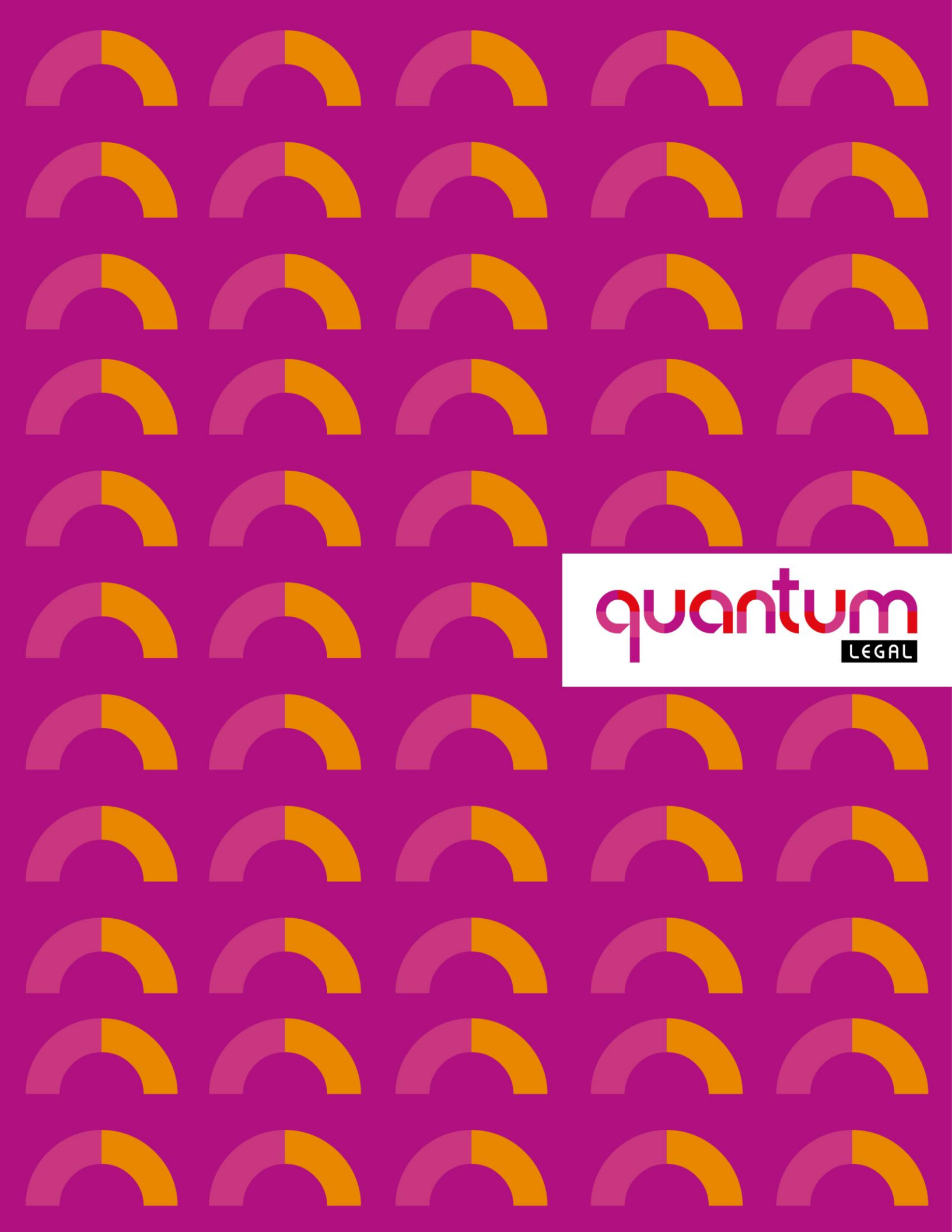
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POL-021: Deadline & Court Calendar Management Policy

Effective Date: 2026.05.01

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Purpose

This policy establishes a standardized framework for managing court dates, procedural deadlines, limitation periods, and related time-sensitive obligations to ensure compliance with court rules, statutory requirements, and professional standards. Effective deadline and calendar management is critical to risk mitigation, client service, and the firm's fiduciary and ethical responsibilities.

Scope

This policy applies to all attorneys, legal officers, paralegals, clerks, assistants, and any staff involved in case handling, court filings, or matter administration across all practice areas and jurisdictions.

Policy Statement

All deadlines, court appearances, and time-bound obligations must be accurately recorded, actively monitored, and independently verified to prevent missed deadlines, adverse rulings, sanctions, or client prejudice. No matter may proceed without proper calendar controls in place.

Primary Responsibilities

Attorneys with carriage of a matter retain ultimate responsibility for identifying, recording, and meeting all deadlines and court dates associated with their files. Support staff may assist with data entry and monitoring, but responsibility is not delegable.

The Accounting & Legal Office and/or designated Operations function is responsible for oversight, periodic audits, and escalation of systemic or recurring issues.

Identification of Deadlines

Deadlines must be identified immediately upon receipt of any court order, filing, correspondence, notice, or statutory trigger, including but not limited to filing deadlines, service requirements, hearing dates, limitation periods, timelines agreed between counsel, and internal review deadlines.

Where there is uncertainty as to a deadline, the most conservative interpretation must be adopted pending clarification.

Calendar Entry Requirements

All deadlines and court dates must be entered into the firm's central case management and calendar system within one business day of identification.

Each calendar entry must include the matter name and number, jurisdiction and court, description of the deadline or hearing, responsible attorney, and any preparatory milestones.

Personal calendars may be used as supplementary tools but do not replace the firm's central calendar.

Dual-Control and Verification

All critical deadlines must be subject to dual-control.
The originating attorney or staff member must enter the date, and a second designated person must independently verify accuracy against the source document.
Verification must be documented within the system or file notes.

Reminder Protocols

Multiple reminder alerts must be set for each deadline, including advance reminders sufficient to allow drafting, review, filing, and contingencies.
Reminders must escalate as the deadline approaches and may not be dismissed without confirmation that required action has been completed or formally deferred with approval.

Court Appearance Management

All court appearances must be confirmed at least one business day in advance, including time, format (in-person or virtual), location or link, and required documents.
Any changes, adjournments, or cancellations must be immediately reflected in the calendar and communicated to all relevant parties.

Filing and Completion Confirmation

Deadlines are not considered satisfied until filing or service is completed and proof is obtained.
Confirmation of filing, acknowledgements, receipts, or stamped copies must be uploaded to the matter file and referenced in the relevant calendar entry.

Escalation of Risks

Any risk of a missed deadline, late filing, or scheduling conflict must be escalated immediately to the responsible attorney, supervising partner, and Accounting & Legal Office.
No attempt should be made to conceal, delay reporting, or independently resolve deadline risks without notification.

Audits and Monitoring

Deadline and calendar compliance will be periodically audited as part of file reviews and operational audits.
Patterns of non-compliance, late entries, or inadequate monitoring may result in corrective action, retraining, or formal performance management.

Training and Accountability

All staff involved in matter management must be trained on this policy and related systems.
Failure to comply with deadline and court calendar management requirements will be treated as a serious operational and professional risk and may result in disciplinary action.

Audit Checklist

This checklist is to be used for file reviews, attorney audits, and ongoing compliance monitoring. Each item should be marked Yes / No / N/A with comments and evidence where applicable.

1. Matter has a designated responsible attorney clearly recorded.
2. All court dates and deadlines are clearly identifiable from the file record (orders, pleadings, correspondence, statutes).
3. All identified deadlines were entered into the firm's central calendar within one business day of identification.
4. Calendar entries clearly state the matter name, matter number, court/jurisdiction, and nature of the deadline or appearance.
5. Preparatory milestones (drafting, review, filing) are reflected where applicable.
6. Critical deadlines are subject to dual-control verification.
7. Second-person verification of calendar entries is documented.
8. Multiple reminders are set for each critical deadline.
9. Reminder timing allows sufficient lead time for drafting, review, and contingencies.
10. No reminders were dismissed without confirmed completion or approved deferral.
11. Court appearances are fully detailed in the calendar (date, time, format, location or link).
12. Court appearances were confirmed at least one business day in advance.
13. Changes, adjournments, or cancellations are promptly updated in the calendar.
14. Completed filings or service are supported by proof (receipt, acknowledgment, stamped copy).
15. Proof of filing/service is uploaded to the matter file.
16. Calendar entries reference confirmation of completed filings.
17. There is no evidence of unreported missed or at-risk deadlines.
18. Any deadline risks or near-misses were escalated promptly in accordance with policy.
19. File shows no reliance solely on personal calendars for deadline management.
20. Staff involved in the matter demonstrate familiarity with the deadline and calendar management process.
21. No repeat or systemic calendar-related deficiencies are noted for the responsible attorney.

Corrective action or retraining is documented where deficiencies were previously identified.
Reviewer conclusion:

Overall compliance with Deadline & Court Calendar Management Policy is satisfactory.

Comments:

Reviewer name: Date:

Breach of Policy

Failure to comply with this policy may result in corrective action in accordance with firm procedures, up to and including disciplinary measures.

Effective Date

This Policy takes effect on the date of formal approval and remains in force until amended or revoked.

Review and Updates

This policy will be reviewed periodically to ensure it remains aligned with operational needs, regulatory requirements, and best practices in client care.

Employee Acknowledgement and Confirmation

I, _____, acknowledge that I have received, read, and understood the contents of the **Deadline and Court Calendar Management Policy**.

I confirm that:

- I understand my obligations under this Policy and the standards expected of me;
- I agree to comply with the requirements set out herein and any related procedures, guidelines, or standard operating documents;
- I understand that failure to comply with this Policy may result in corrective or disciplinary action in accordance with organisational policies;
- I undertake to seek clarification where any aspect of the Policy is unclear.

I further acknowledge that this signed confirmation forms part of my official HR and compliance record in accordance with organisational requirements.

Employee Name: _____

Signature: _____

Date: _____

Position: _____