

Resource Coordinator Handbook

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Log into RB as usual. Pull up these three tabs: **Assign Resources, Calendar Manager** and **Jobs in Progress**. You will work out of these three tabs every day. There are other tabs you will work out of as well, but these three tabs are the most commonly used by the RM.

In the Assign Resources Tab:

This is where you'll spend most of your time. This is where you'll see jobs entered into the calendar that you will start scheduling for. The Client Managers (CMs) input all the data into RB. The jobs will appear automatically, every time you refresh your screen. You will want to "section" off your screen by separating the states and dates. This makes your job easier.

To "Section" off your screen:

- Right click the first grey area you see which "outlines" the data screen. A box will pop up, choose Group by Box.
- From there, you want to choose the tab that says Job Date. Click and drag it upwards all the way to the left as far as it will allow you to go. Drop it there. Now, your jobs are separated by dates.
- Now, you want to choose the tab that says Location State. Click and drag it upwards next to Job Date and drop it there. Now, your jobs are separated by Date and State.
- Now, look at your columns underneath Job Date and Location State. You can click and move these columns to the left or right depending on what you prefer to see first. I prefer to view my screen with my columns like this:

Job number; Resource; Notification; Acknowledged; Notation; Job Date; Start time; Location city; Location state; Case Name; BU; Firm; Contact. From there, the rest of the tabs are not important. You can adjust the length of each column as well to fit the screen.

- Please note: The screen is not large enough to accommodate viewing all of the columns so I only put these certain tabs in my viewing area, the rest do not matter. You can adjust the size of the columns by clicking on the lines in between the tabs.
- Now, your screen is set up and you are ready to schedule. You should know what states are in your coverage area. You will schedule for your states only (unless you are covering for another RM) and you will want to schedule as far in advance as you can in order to stay on top of the settings and not fall behind.

Assigning a Resource:

Scroll down the Resource column in your coverage areas. If the Resource column is blank, you need to schedule the resource. There are many things to keep in mind when scheduling a reporter. Right click on the job and click Job. This will "open" the job so you can view all the details. There are many tabs within each job:

- **General Tab:** This has our client's information, the job date, the time of the depo, the "type" of depo, the witness' name, the case name (and case information) and the BU.
 1. Case: If there is no notice in the JLR (explained further down), you can view the case information by clicking on the notepad icon to the far right of Case.

(Continued) This is also where you'll find the Case-Level Repository, which is where the CMs upload anything important relating to the case such as notices.

2. BU: The BU is the Business Unit. This simply tells Billing which marketer the job is tied to.
- **Location Tab:** This has the location of the deposition. Any details about the location will be listed in the Location Detail box.
 - **Additional Tab:** This is a very important tab for you and the resource. At the top of this screen is Notation.
 1. Notation: In that field are our notation abbreviations such as: TC (Teleconference); RSH (rush); RT (realtime); V (Video), etc. Pay attention to the Notation. You will need to know if this job is RT or RSH.
 2. Due date: This is the due date for the transcript. All Texas due dates are 5 business days. All out of state due dates are 8 business days, unless it is an asbestos plaintiff depo. Asbestos plaintiff depositions are 5 business days.
 3. Billing Rate: This is very important. This is where you'll be able to tell the reporters what their pay rates are. Pay attention to the pay rates. For more information on pay rates, see....
 4. Resource Notification Notes: This is where the reporter will be "warned" for any special information she needs for the job. If there is a TC scheduled, there will be a dial in number listed. If the reporter should bring a speaker phone, there should be notes about that. If it's RT, there should be notes about whether or not the reporter needs to bring a laptop, etc. It is your duty to make sure the notes are there for the reporter, and they should be very clear and easy to understand.
 - **Parties tab:** RMs can disregard this tab.
 - **Resource tab:** If a resource is requested, her name will appear in the Requested Resource field. This is who you should schedule, but make sure it is not a "copied" job where that particular resource would not apply to this job.
 - **Job-level-Repository (JLR):** This is where the notice should be uploaded by the CM. Other information is uploaded here as well, such as captions (if there is not a notice) or exhibits if there are exhibits that the reporter needs to print and bring to the deposition.
 1. Everything the resource must receive should be saved as "Notice", or the resource will not receive it when the confirmation is sent.
 2. Other things uploaded that are not for the reporter (such as hotel room contracts or old notices) should be saved by the CM as anything except "notice" so the reporter does not receive it when the confirmation is sent.
 - **Status Log:** This is for the CMs. It's just the place where they notate the status of the job: New, Will Call Back or Confirmed.
 1. When the job is a new job, it is green.
 2. When the job is at Will Call Back status, it will be orange.
 3. When the job is Confirmed, it will turn blue. When it turns blue (confirms), you can send the confirmation to the reporter.

- **Notes Log:** This is where notes are made regarding the job.
 1. You will need to “note” the job often as to the status of the job for things like keeping track of everyone you called or emailed to cover the job, an ETA of when the job will be turned in, anything that happens that is of any importance pertaining to the reporter, client, or the transcript.
- **Assign the resource.**
 1. Right click on the job and click Assign Resource.
 2. At the bottom of the screen, click on the eraser icon. This will clear out the Search Criteria field.
 3. Next, click on the binocular icon to look up the resource.
 4. In the Display Name field, type the name of the resource and click Search.
 5. Choose the appropriate resource and click Select.
 6. Click Search at the bottom of the screen. If the resource is available, her name will appear in the Available Resources box and the box next to the name will be checked. If the name does not appear, the resource is either already scheduled on a job that day, or the resource is not available that day. Check to see, you may have to choose another resource.
 7. Once you have your resource chosen, click Save and Close.
 8. Your resource’s name should appear as the resource for the job.
 9. If you need to remove a resource, right click on the job and click Remove Resource. Click Yes if you are sure you want to delete the resource.
 10. When you assign or remove a resource, a note is automatically added to the job notes as to whom you assigned or removed.
- **Sending Confirmations:**
 1. When the job confirms, first verify all the information in RB is correct by viewing the notice and comparing it to the data in RB. If there are any discrepancies, email the Client Manager for clarification. Add notes to the Resource Notification notes, if needed.
 2. Once all data is verified to be accurate, send the confirmation to the resource by clicking Show Worksheet Options at the bottom of the screen.
 3. The Worksheet Options grid will open. We work out of the third column which is the Email column. Check the Email box. This is how you’re letting RB know how to send the confirmation; via email. Right click on the job and click Notify.
 4. This will generate an email to the resource with the notice attached and anything else that the reporter should receive (such as a UPS label for exhibits, if needed.) See UPS Labels, pg. ____
 5. In this email, you will want to have copied all the pertinent information from the Resource Notification Notes and you will paste them to the body of the email. Pay special attention to changes in location or time! It’s a good idea to put information like that first, then list any other pertinent information.
 - a. If there is a change in time or location, in your email, ask the resource to CONFIRM that he/she sees the time change or location change. Never assume the resource sees this, make them confirm they see it!

Calendar Manager:

This is where you can look up an entire case, or pull prior transcripts, or view the transcript once it has been turned in. You can also view production information such as how many copies were sold, how many pages the transcript is and which clients ordered a copy. This information comes in handy at times.

- **To view the entire case:**
 1. Open the job in RB. Copy the case name. Close out of the job.
 2. From there, click on the eraser to clear out the fields. Once cleared, click on the binoculars to look up the case. Paste the case name in the field and click Search.
 3. Highlight the case name if there is more than one, click Select, then Search. Every job in that case will be listed.
- **To pull up a prior transcript in that case:**
 1. Pull up the case in Calendar Manager by using the steps above.
 2. Locate the exact transcript you need by viewing the witness name, date, etc.
 3. Right click on the job and go to Turn In.
 4. Four boxes will appear. In the first box is the ASCII. Double click the ASCII.
 5. Click on the Witness-Level Repository (WLR) tab.
 6. The ASCII, etrans, exhibits are all listed there. Choose either the ASCII if you want to send the ASCII or choose the Etrans if you want to send a word list.
 7. Sending the ASCII: Right click on the ASCII file and click View. Across from File Name, you will see a box with an arrow pointing upward. Click on that box. The transcript will appear. You can then save it to your desktop and send it in an email to the reporter.
 8. Sending the Word List: First, you must pull up the Etrans to get the word list. Follow the steps above, but choose Etrans instead of ASCII by right clicking on Etrans, then View. Click on the box with the upward arrow. The Etrans will appear. Go to File, Print, Word Index. Make SURE you change the "Printer" to say CutePDF Writer, otherwise, it will print the entire word index. Click OK, save it to your desktop and then send it in an email to the reporter.

Jobs In Progress:

This is how we track late transcripts. You will want to "section off" your screen for organization.

To "Section" off your screen:

- Right click the first grey area you see which "outlines" the data screen. A box will pop up, choose Group by Box.
- From there, you want to choose the tab that says Resource. Click and drag it upwards all the way to the left as far as it will allow you to go. Drop it there. Now, the jobs are separated by Resources, which makes it easier to track. Once you do this, your screen should stay this way.
- You may want to move the columns (tabs) on top around to view the most important information. I prefer to view my screen with my columns like this:

Resource, Job Number, Job date, Due date, Turn-in Date, Days Old, Case name, Firm, Contact, Job Type

- Please note: The screen is not large enough to accommodate viewing all of the columns so I only put these certain tabs in my viewing area, the rest do not matter. You can adjust the size of the columns by clicking on the lines in between the tabs.

Checking Jobs in Progress:

You are looking for late transcripts. "Late" means anything that was due by a certain date, but it has not been turned in by that date before 5pm CST. Look at the "Due Date" Column. If a job is due on 10/1, but on 10/2 it is not in yet, it is late and you should check on the ETA.

- You should try to check the late list every single day. Contact every reporter for every late job via email. Once you hear from the reporter, note the job as to the status.
- Follow up daily on jobs that are still not turned in.

To Add a Resource to RB:

Before you add a resource to RB, first do a quick search of the resource's name to make sure he/she is not already in RB. You can add the resource by clicking Setup from the toolbar, then go to Resources. Click Actions, then New.

- In the General tab, fill out all necessary fields such as first name, last name, address, city/town, state, postal code, phone numbers. For the resource type, choose from the dropdown menu.
- In the Additional tab, type in the resource's email address and underneath that, choose "Don't Send" from the dropdown menu. (This is important. If you do not choose "Don't Send", then every time you send a confirmation to any resource, RB will automatically want to send a confirmation email to this resource as well.) You will also type in the Web Account Name and Web Password. For the web account name, we generally use the last four letters from the resources last name, and then the first two letters from the first name. The password can be anything; I usually use the word "reporter". Each is case sensitive.
- In the Pay Info tab, if it's the resource will be a "regular" and will go with our rates without sending invoices, the Pay Rate Group should be Standard. If it's a firm who will send invoices, choose Invoice from the drop down menu. Leave everything else alone. Billing will fill in everything else.
- In the Specialties tab, you can add the resource's "specialty" by clicking Add/Remove. You will want to click every box that the reporter can offer; be sure to include the state where the reporter is certified in. This will help you later when you are looking up reporters for that coverage area.
- In the Resource Level Repository (RLR) tab, this is where you will upload the resources W9. You must NOT forget about the W9. Always follow up with every resource until you receive the W9 or their pay will be delayed.
- In the Notes lob tab, please list how you found this resource and provide all information you have about the resource.

- You will need to make sure you send the reporter the HG documents which include the Deposition Coverage Guidelines, the Reporter Website Guidelines, the Attorney Order Form, a W9, our reporter pay policy (see below). Take the time to READ these documents too, they will help you better understand what you need from the reporter. Each document is attached at the end of this manual.

UPS Labels

Reporters have exhibits to almost every deposition they cover. Videographers have tapes. We either need to set them up with their own UPS account or you should provide each reporter (or vid) with a UPS label for sending exhibits back to HG.

- The easiest way to handle this is to set them up with their own UPS account. Email Production and ask them to set up the resource (give first and last name) and provide the resource's email address. Production will email you a username and password. Copy and paste that information into the resource's notes. Make sure you let the reporter or vid know that you have them set up with UPS. Tell the reporter or vid to expect an email from UPS, and to keep that email in order to access labels.
- To provide a label to a resource, you can use the same information other RCs use to access labels, which is below, or you can ask Production to set you up with your own account so you can get your own labels. Otherwise, instructions are below.
 1. Go to www.ups.com
 2. Click on Access CampusShip to the left of the screen.
 3. The User ID we use is: aculberson62911
 4. Password is Welcome18
 5. Click Log In
 6. In Box 1: Where is Shipment Going? This should be Amanda Reyes if you are making a label for a reporter. If you are making a label for a vid, it should be Jennifer Schwem.
 7. Box 2: Where is the shipment coming from? This should be the resource's address. You can click "Edit" to change this resource. You can change the resource by choosing from the drop down menu. If your resource is not listed, add the address manually and click Save at the bottom.
 - a. The Return address MUST match the Ship From address. If it does not, click "Edit" under Return Address and choose the same reporter as the Ship From address. If these addresses do not match, we are charged more for the shipment.
 8. Box 3: What are you shipping? In the Package type, choose UPS Letter. Under Weight: Choose 1 lb.
 9. Box 4: How would you like to ship? Choose UPS Next Day Air Saver.
 10. Box 5: In the Job Number field, type the job number.
 11. Box 6: How would you like to pay? Leave this box along, it should already state: UPS Account.
 12. Click Next. Read the label and make sure it is correct.
 - a. The Ship To field is Amanda Reyes (if this is for a reporter). If it's for a vid, it should be Jennifer Schwem.

- b. The Ship From and the Return address MUST be the same.
 - c. Check box 3. If your job is a rush, make sure the date in Box 3 will ensure your package arrives on time. Adjust if necessary by clicking “edit.”
13. Click Ship Now.
 14. Click Print.
 15. To save, chose the CutePDF Writer and save the file to your Desktop.
 16. Make sure you upload a copy to the JLR.

Desktop Depos

A Desktop Depo (DD) is something that the videographer usually handles, but in some cases, the client does not want the depo videotaped, which means that the reporter will need to handle the DD. Below is what you would want the reporter to know about DD.

- The reporter will need a laptop with webcam. Josh or Erik in our IT department will walk the reporter through the set up and can do a test run a few days before to make sure the reporter is comfortable with it. It’s not difficult at all. There will be a link that Josh will send to the reporter. Reporter will set up the laptop, aim the webcam at the witness and click on the link provided by Josh or Erik. The witness will be viewed via live internet feed (which our IT department will test a few days before). The client(s) will view the witness from their location and will hear the witness via teleconference.
- There will always be a DD worksheet when the job is created. You will need to fill out the worksheet in order to provide Erick or Josh with the reporter’s information. The worksheet will need to be filled out as soon as you have scheduled the appropriate reporter. You will email the CM and all others involved with that particular job that the DD is updated.
- Make sure your reporter is aware of what he/she will need to bring. RB should also have everything listed under the Resource Notification Notes.
- If you are covering for Jennifer, and a videographer is handling the DD, the vid will need a camera with firewire and a laptop with a firewire port. A test run will also be done with our IT Department.

Also, when you see a DD job in RB, and there is a video job as well, then the vid will handle the DD. The resource to be assigned to that job is “Desktop Depo” so that it does not appear to be an unscheduled job which would create confusion.

Figuring Reporter Rates:

Every job has a Billing Rate table already in the job located in the Additional Tab. You will not have to quote rates to our “regular” reporters, but you will have to quote rates to reporters who are not used to working with HG, or if there are “special” rates in the jobs.

- To view the Billing Rate table, click on the notebook icon to the far right of the Billing Rate. You will see a list of rates. In the Remarks section, the rates are usually listed there, but you can also scroll down to view more rates such as Realtime, Rough, etc. The reporter will get 70% of the rates listed. The only time the reporter will get less, is if it's a California Asbestos Case (see below for more information about that).

For example, if the O&1 is 4.00, that is what we are charging to the client. Take 30% off, and that leaves \$2.80. The reporter will get \$2.80 (which is 70% of \$4.00). Same for the copies: \$2.50 to the client which is \$1.75 to the reporter. (\$2.50 minus 30% equals \$1.75)

- When quoting rates to reporters, you must remember to add extra charges if they apply, such as expert/technical/video, rough, realtime or rush. We charge an extra .25 for expert/technical/video. We charge \$1.00 to the clients for rough drafts. Realtime is usually \$1.50 (but check rate table in that particular job). Rush charges are below.

Our Expedite charges are:

Same Day 125%
24 Hours 100%
48 Hours 75%
Third Day 50%
Fourth Day 25%
Fifth Day 15%
Sixth Day 10%

Here is an example reporter rates for a videotaped, realtime job with rough draft needed, and it's a 24-hour rush: Billing Rate is O&1 is 4.75, \$2.70 copies, \$100 appearance fee.

So you'd add the extra charges for expert/tech/video (.25), add charges for RT (1.50), add charges for rough (1.00) and then add 100% for the 24 hour rush and you get the new rate of: \$15 per page to the client, minus 30% which makes \$10.05 to the reporter.

California Asbestos Cases – AND PROTECTIVE ORDERS

Our California Asbestos cases have “special” rates that you will need to be aware of when scheduling a reporter on any deposition that is asbestos and filed in California. Below is what I send to the reporters in an email. I also paste this information in the Resource Notification Notes in RB. Please note, for CA Asbestos jobs, the reporter percentage is 65%, not 70%.

- For California-filed cases, the reporter rates are __ 0&1 (if videotaped), __ copies (if videotaped) with \$65 app. fee per ½ day; if 4 or more copies are sold, roughs are not billed to clients and reporters are not paid for roughs (but copy sales usually make up for that).
- Also, this is very IMPORTANT. For California-filed asbestos cases, if anyone at the deposition mentions the words "**protective order**" or "**suspend the depo**", the reporter must stop writing immediately and cannot go back on the record until all parties agree to do so. This is unlikely to happen, but it is a rule for CA-filed cases so you will want to copy and paste this information to the Resource Notification Notes Rule is 2025.470.

Asbestos Plaintiff Depos: These depositions are always a 5-business day turnaround. Not any reporter can cover a plaintiff job. Only the best of reporters should cover them due to the length that they go every day, and the fact that the clients will likely request same day rough drafts. We always want to be sure we schedule a reporter who can handle that, plus get the transcripts in on time as well as keep track of all the orders which can change from day to day.

HG Due Dates:

Our due dates vary depending on what type of job it is and where it is located.

Asbestos plaintiffs – 5 business day turnaround

Texas – 5 business day turnaround

Out of state depositions – 8 business day turnaround unless it’s an asbestos plaintiff depo

Realtime Jobs

Some jobs in RB will be realtime. You will need to schedule a realtime reporter to cover realtime jobs. The notation in RB should have RT in it, and the request for RT should also be listed by the CM in the Resource Notification Notes so that the RC and the reporter are aware of what equipment to bring. If the client is bringing his own laptop, it is a good idea to arrange for the reporter to go ahead and bring her own laptop too, just in case the attorney’s laptop is not working for some reason.

Most of the time, clients request RT with Livenote. This is actually the “old” way of doing RT, but for now, most attorneys prefer Livenote because that used to be the most popular way to view RT, however, there are many ways for the reporter to supply RT to the clients. The most current version of RT is through CaseView Net. This is where the reporter brings an iPad and the client will view RT using the iPad. There is also Bridge. All RT reporters know how to set up their own RT feed. **If the attorney wants RT with Livenote at the

depo and he is bringing his own laptop, he must have the Livenote software installed on his laptop in order to view the RT. See more information under Livenote Stream set up.

Livenote Stream:

If an attorney knows ahead of time that they cannot be at the deposition physically, but they still want to attend remotely and view RT, they can ask us to set up a RT stream. We do so by using Livenote Stream. Instructions are below. Livenote Stream is expensive. The CM may want to make sure they know about the charges ahead of time. See Livenote Stream Rates below.

Livenote stream set up:

Go to this website: <https://stream.livenote.com/>
(24 hour advance notice is preferred.)

Go to Schedule a Future Session. Scroll down a little bit.

Enter in all information in the fields; including CORRECT reporter email address.

For Video Streaming, always chose No.

- For the Attendees section: Enter the email address(es) of the attorney(s) who are attending the stream in the field provided. Next to it, under Invited by which Law Firm, enter in the attorney(s) firm name. For Instant Messaging Group, choose Group A from the drop down menu. Next to it under Role, choose Attorney from the drop down menu. You will do the same for EVERY attorney that you enter. Confirm that all your information is correct, click Submit.

*****Important*****

A few hours or so later, Livenote will send you a confirmation that the stream is set up. If you do not receive the confirmation email, please call them at 1-800-548-3668 and let them know you have not received the confirmation. After receiving the confirmation, copy and paste the pertinent information into the job notes (such as: Your Livenote Stream session has been set up; include the email addresses in the confirmation)

- Confirm with the reporter that he/she has received his/her confirmation email. The reporter's email will have instructions for him/her to do the stream. The attorneys will also receive an email. Their email will consist of directions on how to view the stream.

*****Important*****

All attorneys viewing Livenote in person or via the stream MUST have Livenote downloaded on their laptops. (If in person, sometimes the reporter brings her own laptop for them to use, which is fine, but if the attorney brings his/her own laptop, he/she MUST have Livenote installed.)

- If the client does not have Livenote on his/her laptop, he/she can download a FREE version of the Livenote software and it's good for 15 Realtime sessions. Client needs to go to: store.westlaw.com/software. Look for Case Notebook and go from there.

It's self-explanatory, but if the client needs help or has questions, he/she can call 800-290-9378.

Livenote Stream Rates:

Livenote charges us: \$100.00 set up fee; \$125.00 per connection per day. We charge \$1.50 a page per connection to the client, and we should be charging back for the stream.

- If you email west.livenote@thomson.com, you can request a report for your stream jobs and they will tell you who actually logged in to each job. They just need the date, location and case.

RT Tokens:

If your reporter ever calls during a RT deposition and she asks for tokens, below is the information for transferring a token to the reporter.

- You need the Livenote Icon on your desktop. Click on the icon. A box will come up, click Cancel. From the toolbar, click Options, Manage Tokens. A box will come up, click on the 2nd tab: Transfer Tokens Out. The reporter will give you the Transfer Number, type it in the box. Make sure the number 1 is in the box for Number of Tokens. Then click Transfer Out. Another box will come up. You will give that number to the reporter, she will need that to complete the transfer. Copy and paste that number in the job notes and make sure you add a note to Billing about transferring a token.

To download tokens to your computer:

You need the Livenote Icon on your desktop. Click on the icon. A box will come up, click Cancel. From the toolbar, click Options, Manage Tokens. A box will come up, click on the 3rd tab: Download Tokens.

- Account Number is: 155 70584
Pin Number is: 7898
Type in the number of tokens you need
Type in a job number (any RT job number will do)
- Service Rep for tokens
1-800-548-3668, Press 5

California Hearings

Any reporter can cover a hearing if the hearing is scheduled at an attorney's office or some other location that is not in court, however, if the hearing is scheduled in court, use reporters who are current or former officials. (The format for the transcripts is very different than the format for depositions, so we use officials because they are already aware of the rules for formatting, and rules for the court.)

Finding the right reporter:

- In the Resources tab, clear the search criteria. In the "Specialty" drop down menu, choose "Court Official – Mosk" if the hearing is at Mosk Courthouse. Choose "Court Official – CCW" if it is at Central Civil West. There are several listings there for you to choose. Pay attention to the location, and you will find where to pull the reporter from. (San Francisco if the hearing is in San Francisco or Oakland, etc.)
- Any reporter listed will be able to cover any hearing in their coverage area unless there is a warning note not to use them for any reason. You can always find more reporters, if needed, by searching the internet for: Superior Court of ____ and fill in the city. Search that website for a directory of court reporters, or you can search the NCRA website for officials within that ZIP code.

Department 324 Hearings

First, determine if it's HG's week or AW's week to cover in Dept. 324. (We take turns each week covering that department.) On my desk is a calendar. Every Monday is labeled as HG's week or AW's week. If it's HG's week, you'll need to find a reporter. Detailed instructions are below. If it's AW's week, Kelly Roemer with Aiken will tell you who the reporter will be. Detailed instructions below.

- **HG'S WEEK TO COVER:** Find the resource in RB by searching under Specialties. Choose from any reporter on the list that is not marked with "Do not use for Dept. 324"

Once you find a reporter, assign her. Please check to make sure the Resource Notification Notes state the following: Time of hearing, Type of hearing, reporter instructions, and the case caption. Also, reporter's per diem is \$281.30 if there is only one hearing. If there are two hearings or more, it's \$142.50 per hearing with a maximum of five motions. After five motions, get another reporter. Example below.

9am PST, Dept. 324

If a transcript is ordered, send the ascii to aculberson@hglitigation.com along with any copy orders. Please use the attached worksheet; have attorneys sign if they are splitting the cost of the per diem.

Donald J. Miller, an individual; & Helen L. Miller, an individual v. Alfa Laval, Inc., et al
Superior Ct Cali Cty Los Angeles

BC 461760

Per diem is ____.

- If the reporter does not have the caption, she will NOT know which hearing she is covering. If the CM does not put the case name in RB, you MUST ask for it. If we get any additional hearings in 324, continue to put that same reporter on them but call her or email her upfront to let her know of any additional hearings that are

added. *****VERY IMPORTANT:** Many times the CM has just copied the job to create another hearing in RB. PLEASE make SURE that the caption in the Resource Notification Notes MATCHES the caption in RB. I almost always have to update that! We don't want to send the reporter two different captions.

- Wait until all hearings in 324 have confirmed before you send the confirmations so that we do not send confirmations, then cancellations, then more confirmations. That will just create confusion. In the subject line of the confirmation emails, I usually put "1 of 4 hearings" (or however many there are). This will help the reporter keep them organized. We have had issues in the past with reporters "missing" their hearings.
- At the end of the day before I leave, I send a "final lineup" email to the reporter AFTER I send all the confirmations for the day. This email will list all the hearing times and the captions for each in ONE email so she has them all listed in order of earliest time to latest time. (This will help her see what hearing is next by giving her all the hearings and cases in one email rather than sifting through each confirmation separately.)
- If the reporter does not turn in the ascii by the due day, it's likely that the transcript was not requested. Contact the reporter and find out if a transcript was requested, and if so, ask the reporter to send you the ascii with any copy orders. If the transcript was NOT requested, then you'll need to turn in an appearance fee. Once you get the ascii, it's time to upload! (Some reporters already know how to upload.)
- If there is NO ascii, and it's just an appearance fee, you'll upload the ½ day per diem.
- One last thing: For each hearing, you'll need to put a note to Billing for whatever the pay is. Example: *****BILLING*** Dept. 324, reporter's per diem is \$281.30 (or it's one of X hearings, and it's \$142.50)**

AW'S WEEK TO COVER: If it's AW's week, email Kelly Roemer with Aiken Welch (in RB under Aiken Welch – copy the other emails listed in RB in case Kelly is not in the office). Let them know that you have a hearing on (date) at (time) in the ___ case, and ask if they have a reporter scheduled.

- When she tells you who the reporter is, find that reporter in RB. If the reporter is not in RB, ask her for the reporter's contact information. Put that reporter on the job. It's a good idea to call and email the reporter upfront to let her know that you were informed that she is the reporter covering hearings on that date in 324 for Aiken, and that you have hearings to add, and give her the times to make sure she can cover all of them.
- You MUST make sure the case caption is in the resource notes, as well as the start time. Please make sure the Resource Notification Notes state the following: Time of hearing, Type of hearing, my reporter instructions, and the case caption. Example below.

9am PST, Dept. 324

If a transcript is requested, send the ascii to aculberson@hglitigation.com along with any copy orders. Reporter's per diem is \$281.30 for one hearing. If more than one, it's \$142.50 per hearing.

Donald J. Miller, an individual; & Helen L. Miller, an individual v. Alfa Laval, Inc., et al
Superior Ct Cali Cty Los Angeles
BC 461760

- If the reporter does not have the caption, she will NOT know which hearing she is covering. If the CM does not put the case name in RB, you MUST ask for it.
- If we get any additional hearings in 324, continue to put that same reporter on them but call her or email her upfront to let her know of any additional hearings that are added. *****VERY IMPORTANT:** Many times the CM has just copied the job to create another hearing in RB. PLEASE make SURE that the caption in the Resource Notes MATCHES the caption in RB. I almost always have to update that! We don't want to send the reporter two different captions.
- Wait until all hearings in 324 have confirmed before you send the confirmations so that we do not send confirmations, then cancellations, then more confirmations. That will just create confusion. In the subject line of the confirmation emails, I usually put "1 of 4 hearings" (or however many there are). This will help the reporter keep them organized. We have had issues in the past with reporters "missing" their hearings.
- At the end of the day before I leave, I send a "final lineup" email to the reporter AFTER I send all the confirmations for the day. This email will list all the hearing times and the captions for each in ONE email so she has them all listed in order of earliest time to latest time. (This will help her see what hearing is next by giving her all the hearings and cases in one email rather than sifting through each confirmation.)
- If the reporter does not turn in the ascii by the due day, it's likely that the transcript was not requested. Contact the reporter and find out if a transcript was requested, and if so, ask the reporter to send you the ascii with any copy orders. If the transcript was NOT requested, then you'll need to turn in an appearance fee. Once you get the ascii, it's time to upload! (Some reporters already know how to upload.)
- If there is NO ascii, and it's just an appearance fee, you'll upload the ½ day per diem.
- One last thing: For each hearing, you'll need to put a note to Billing for the per diem. *****BILLING*** Dept. 324; reporter's per diem for one hearing: \$281.30. (If it's more than one, than it's \$142.50 per hearing.)**

OTHER HEARINGS NOT IN DEPT. 324:

We cover many hearings that are NOT in Dept. 324. Some are in Oakland or San Francisco. You'll want to search under Specialties for the resources, either for Court Official – LA or Court Official – San Francisco. So far, these are the only two areas we have a good pool of ex-officials in. Obviously, if it's a hearing in Oakland, you will not want to email reporters who are in the LA area, and vice versa.

- If we get a hearing in a not-so-common place where we do NOT have a pool of ex-officials in RB, such as Sacramento, in order to find ex-officials, you would want to Google "Superior Court of Sacramento" and pull up the website for the court. Search the website for a Directory of Officials and make calls or send emails from that list.

Other information/tips regarding reporters or transcripts:

- HG will reimburse our “regular” reporters for speaker phones, up to \$250. However, if you are using a reporter one time only for a hard-to-cover area, please just have that reporter purchase a normal speaker phone from Wal-Mart or Best Buy, and we will reimburse for that (\$30-45).
- When reporters are asked to send rough drafts, we always ask them to copy the RC and Production. Production will upload the rough into the JLR. If anyone else asks for a rough, we can send it to them without having to wait for the reporter to send it. You would need to notify the reporter so she can add that to her billing sheet.
- When you scheduled a reporter on a job, try to keep that same reporter covering the same case. It helps with continuity, and that reporter is familiar with the case.
- When you have continuous days of depositions, the transcripts will be listed as Volume 1, Volume 2, etc. The page numbering will be consecutive. Exhibits are also usually marked consecutively, so if you have a depo that will continue like that but your reporter is not available to continue, you would need to make sure the second reporter covering knows the exhibit number they left off with in the previous volume. She will also need to know the starting page number (the last page used in the previous transcript).
- We try to schedule the closest reporters as possible, and mileage usually is not paid to the reporters unless it is a very rural area. If mileage is necessary for coverage, calculate the mileage round trip, then email the client manager for approval. Always note the job.
- Any time you send an email about a job, you must include the job number in your subject line. Do not include the job number in the body of the email, as you would have to scroll down constantly to view the job number in question.
- We do not email exhibits to clients or reporters. They are supposed to be uploaded to the JLR for the reporter to view and/or print, and to the CLR (Case Level Repository) for clients. If the CM asks you to email the reporter some exhibits for printing and bringing to the depo, upload the exhibits to the JLR. The reporter can view them there and will print them there. The reporter should add this to her billing sheet so she can be reimbursed for the pages.
- If you are made aware that a client decides he no longer needs a transcript, and the transcript has not yet been turned in, it is called a No Write. The reporter’s billing sheet would have the “No Write” on it, plus the appearance fee, plus half the estimated pages. However, if the reporter is almost done with the transcript when we find out they do not need it, if she can get it in the same day, we would go ahead and charge the full amount.

DEPOSITION COVERAGE GUIDELINES FOR HG LITIGATION – You should have this document saved separately on your computer, and you should send this to all newly-added reporters. Take the time to read this document so you will be well-versed on your expectations from reporters.

PLEASE READ ALL INFORMATION WITHIN THE DEPOSITION GUIDELINES PRIOR TO COVERING A DEPOSITION FOR HG LITIGATION

Fill out the attached W-9 form and return via fax or scan to your Resource Coordinator listed at the end of this form. Please send a brief bio describing the types of depositions you have covered in the past, special certifications and what software you are using. HG Litigation also provides direct deposit for Reporters. If you are interested in direct deposit, please contact your Resource Coordinator for the proper form.

DEPOSITION CONDUCT:

- Please arrive to every deposition at least 30 minutes before the start time. Please contact your Resource Coordinator if you will arrive any later, if there is any delay in the deposition start time, and/or if any issues or problems arise at the deposition. It is important that we are kept informed.
- Deposition with a TC (teleconference) requested –Please dial in 10 minutes prior to the start of the deposition. If for any reason you are not able to dial in at this time, please contact your Resource Coordinator immediately so the Attorneys that will be dialing in will know there is a delay. Please identify yourself by giving your name, HG Court Reporter, then City and state you are calling from. When calling in from law firm, do not allow the location attorney to dial in, as this causes the location firm to be charged for the call. The reporter must call in and identify themselves as stated above.
- Reporters must dress in business professional attire.
- Please state you are representing HG Litigation Services & do not solicit for any other company.
- Do not provide your personal business cards. Blank HG business cards will be supplied to you by your Resource Coordinator.
- Only use the attached Attorney Sign-In Sheet at all scheduled depositions. Please have attorneys sign for their copy orders or send you an email. Please keep these written records in case the need ever arises to prove up a copy order.
- When rough drafts are requested, please send the rough directly to the client(s), but also copy your resource coordinator and Production@hglitigation.com. Please put Rough Draft in the subject line.

DEPOSITION COVERAGE GUIDELINES FOR HG LITIGATION Continued

- Realtime depositions -Please bring extra cables and/or USB adaptors. If you supply a loaner-laptop, make sure it is equipped with up to date Realtime software. If tokens are needed, please contact your Resource Coordinator.
- Most Asbestos depositions will require a speaker phone, polycoms are preferred. Please take one to every job. Hotel speaker phones may not have the sound quality necessary for all parties to hear.
- Standard turnaround is 8 business days after the deposition. Plaintiff depositions and depositions taken in Texas are due on the 5th business day after the deposition.
- Call or email your Resource Coordinator after each deposition if a rush is requested, or to inform them whether the deposition is continued or completed, or if there are confidential excerpts that need to be extracted from the transcript.

EXHIBITS:

- Please fill out the attached HG Exhibit Cover Sheet completely and send all your exhibits with-in 24 hours to: HG Litigation Services, Attn: Production Dept., 2501 Oak Lawn Ave, Suite 600, Dallas, Texas, 75219.
- If there are no hard copy exhibits, scanned exhibits can be uploaded to HG Web at www.hglitigation.com, Reporter Resources, Exhibits Upload Form (no log in necessary). Exhibits may also be uploaded when uploading the job for production.

Exhibit delivery:

For shipping Exhibits, you will be supplied a UPS login and password to log into our UPS website using our UPS number. If you do not have a UPS login and password to log into our UPS website, please contact your Resource Coordinator to get one. Until you receive an email from UPS with your UPS login and password, your Resource Coordinator will email you a label to print. We no longer permit reporters to use our account number and will not be able to supply this number to you. All UPS packages should be sent via Standard overnight (excluding Saturday deliveries, as our office is closed on the weekend). If you feel you must send your exhibits expedited or if you have any questions, contact your Resource Coordinator BEFORE shipping.

TELECONFERENCE DEPOSITION (TC ONLY):

- Please dial in 10 minutes prior to the start of the deposition. If for some reason you are not able to dial in at this time, please contact your Resource Coordinator immediately so that attorneys dialing in will be aware there is a delay. When you are calling into a TC, please

DEPOSITION COVERAGE GUIDELINES FOR HG LITIGATION Continued

identify yourself by giving your name, HG Court Reporter, then city and state you are calling from.

- Some TC's do not go forward. If the Teleconference cancels prior to the reporter dialing in, the reporter will not be paid an appearance fee. However, if the job cancels after the reporter has dialed into the TC, then an appearance fee will apply.
- Teleconference participants lists will be uploaded to the JLR (Job Level Repository) two to three days after the deposition is complete. If you see that the participants list is not uploaded, please Contact your Resource Coordinator.

TRANSCRIPT FORMATTING :

All final transcripts will be produced by HG LITIGATION. Therefore, all transcripts must be uploaded on-line in the following format:

- ASCII text files with No header or footer /25 lines per page.

HG Litigation follows NCRA guidelines.

(<http://ncraonline.org/NCRA/codeofethics/Transcript>).

If your state's local rules differ, please alert us prior to the deposition date and provide us with your local rules and cite reference.

No fewer than nine or 10 characters to the typed inch. Left-hand margin to be set at no more than 1-3/4 inches. Right-hand margin to be set at no more than 3/8 inch.

Also, Time Stamping needs to be on the left side of the page so RealLegal will recognize it and the ASCII will upload properly.

Texas guidelines:

The distance between the left and right marginal lines must be on less than six and one-half (6 ½") inches or between fifty-six (56) and sixty-three (63) spaces or characters per line. The left margin text must be set one character from the left marginal line, and the right margin text, except for the automatic word-wrapping, must be set one character from the right marginal line (not Justified).

- Exhibit Index must be included on all transcripts. If there were no exhibits marked, please indicate such on the index.
- If it is a video deposition or if time stamping is requested, please provide us with both a time-stamped and non-time stamped ASCII.

DEPOSITION COVERAGE GUIDELINES FOR HG LITIGATION Continued

- Errata sheets must be included on all transcripts where witness reserves the right to read & sign. If a witness waives signature, reporter must indicate signature has been waived on the transcript and, therefore, no errata sheet would be included.
- On occasion, the deposition may continue from day-to-day. You will need to ask counsel how they will require the volumes to be numbered and if they want the pages to run consecutively between the volumes or stand alone. The same information should be asked regarding the Exhibit numbering between volumes. Then, please contact your Resource Coordinator and inform them.
- All transcripts must have a Signed Reporter Certificate with HG Litigation's company information listed on the transcript. There are several options for providing a signed certificate page.
 - a.) Reallegal signature-Upload your transcript through Reallegal.
 - b.) Scanned Signed Certificate page-scan your signed certificate page and upload to the job.
 - c.) Fax Signed Certificate page-Fax your signed certificate page to 1-800-656-3275 (Attn: Production). Please fax signed cert page the SAME day you upload the transcript.
 - d.) Send in Original Signed Cert Page (**required of TX reporters if not using RealLegal).
 - e.) For out of state reporters: Note on the upload process in Step One: Production/OK to sign cert w/permission.
- Be sure to use the correct information on your signature block (see Company Information below).

TX and all other states

Jane Doe
CSR 1123
Expiration Date: January 31, 2014
Firm No. Dallas: 69
1-888-656-DEPO
1-888-656-3275 Toll Free Fax

CA only

Jane Doe
CSR in and for the State of California
License No. 1123
Expiration Date: January 31, 2014
Henjum Goucher Reporting Services
Toll Free Fax 1-888-656-DEPO
1-888-656-3275 Toll Free Fax

DEPOSITION COVERAGE GUIDELINES FOR HG LITIGATION Continued

NOTE: We realize errors sometimes occur. However, the costs associated with having to reproduce transcripts have become prohibitive. For that reason, if a transcript does not meet the guidelines stated above, your Resource Coordinator will contact you to correct the issues. This will delay production, billing, and ultimately push your payday to the next cycle. Likewise, if a transcript must be reproduced due to a reporter error (i.e. incomplete case caption, wrong witness name, misspellings, etc.) the cost of reproducing and delivering the corrected transcript (\$50.00 per transcript) will be deducted from the Reporter's pay.

REPORTER PAY STATEMENTS INFORMATION

HG's payment policy is to pay originals within 30 days and copies upon receipt of payment from the client. This allows adequate time for the billing and production teams to ensure jobs are completed correctly and to meet the processing times required by our payroll service. This policy is adhered to as closely as possible and is subject to change without notice. Any exceptions to this policy must be approved in advance by the Payroll Manager.

Please be advised that any errors within the transcript, the upload process, or transcripts turned in late can delay payment. Contact your Resource Coordinator immediately if you are having problems uploading.

Viewing pay statement:

To view, please log on to www.HGLitigation.com. Once you have logged in, you can check your pay statement by clicking Pay Statement. Then you can click the drop down box to the appropriate pay period then select Show Details for more information.

If you have questions regarding your pay, please email payroll@hglitigation.com.

REPORTER WEBSITE GUIDELINES FOR HG LITIGATION – You should have this document saved separately on your computer, and you should send this to all newly-added reporters. Take the time to read this document so you will be well-versed on your expectations from reporters.

HG Litigation has a website for reporters to view jobs, turn in jobs and view pay statements. www.hglitigation.com

All new reporters will need a username and password to sign onto their web-pages. Usernames and passwords will be assigned by your Resource Coordinator. **Please request this upon being scheduled to cover a deposition, if you haven't been assigned one. Contact info for weekday evenings 7pm to 11pm CST AND weekends:
afterhours@hglitigation.com

Resource Coordinators:

Angie Culberson / Resource Coordinator Manager / California, Alaska, Hawaii
Work: 214-459-2696
Cell: 214-232-1094
Email: aculberson@hglitigation.com

Diane Alschbach / Resource Coordinator / Eastern Time Zone and Texas
Work: 214-459-2700
Cell: 214-548-1231
Email: dalschbach@hglitigation.com

Kimberly Childs / Resource Coordinator / Pacific Time Zones (except CA), Mountain & Central Time Zones (Except TX) and Interpreters
Work: 214-443-2329
Cell: 214-604-7791
Email: kchilds@hglitigation.com

Betty Dalton / Resource Coordinator / California, Alaska & Hawaii
Work: 214-459-1682
Cell: 214-406-7746
Email: bdalton@hglitigation.com

Mehdi Brailey / Resource Coordinator / Video Scheduler
Work: 214-459-2682
Cell: 214-437-6518
Email: mbrailey@hglitigation.com

REPORTER WEBSITE GUIDELINES FOR HG LITIGATION Continued

Once you pull up the website (www.hglitigation.com), you can log-in to your personal website by clicking on REPORTER LOG-IN at the top of the screen or by clicking on the Reporter Resource Tab. Under the Reporter Resource Tab you will find other valuable information, so please take time to review the Reporter Resource Tab when you have a moment. After you have logged into the website, you will be directed to **My Web > News**. Please take the time to review the information on this page, as it will include recent updates and news.

CALENDAR VIEWING:

Above the **My Web > News** you will see three tabs. Click on the Calendar Tab. This is your personal calendar. Listed are jobs you have taken and jobs assigned to you in the weeks to follow. Please familiarize yourself with the information on this page.

- a. To view a job and its repository, click on the job. This should be shown in Blue.
 - b. You will be able to view your worksheet by clicking the tab in the upper right hand corner .
 - c. Scroll down and you will be able to review parties for the case and Repository files for this case, including exhibits. This is called the JLR. Job Log Repository.
- If you have any questions do not hesitate to contact your Resource Coordinator.

TURNING IN JOBS:

Listed below are step by step instructions for uploading your Ascii file and all other information to get your job produced and billed:

First, log in with your username and password. Click on the Turn-in tab.

Step 1 of 5: Edit job

- 1.) Indicate if the job is a rush by selecting the correct information (Yes or No) in the drop down box.
- 2.) In the notes section please list the following:
 - a. All parties' e-mail addresses for those requesting an electronic transcript.
 - b. If there were no exhibits – state NO EXHIBITS. If there are exhibits, please state the delivery date.
 - c. Any special instructions that pertain to this job.
 - d. Then click NEXT!

Step 2 of 5: Witnesses

- a. Please make sure this is the correct witness.
- b. Enter the correct page count, then tab over, so the starting and ending pages will populate. For continuations, you need to enter the correct page count, then must physically enter the correct starting and ending page numbers. Also, fill in the correct volume number for the continuation. (Also, your Ascii should have continuous page numbering if it's a continuing job unless instructed otherwise.)

- c. Exhibit Marked- Enter the last Exhibit marked. This is crucial for jobs where the exhibits are being marked consecutively from volume to volume.
- d. Enter ACTUAL Start Time and End Time, as this may differ from your job sheet.
- e. Send Original To: This is where the original (the read & sign) is being sent for the witness review/signature. If it's the witness's home, please enter the complete address.
- f. Notes for the witness: Please list any special instructions for the witness or production regarding this transcript.
- g. Upload your Ascii file by clicking on Browse then select your Ascii.TXT file.
- h. Select the appropriate file type from the dropdown box.
- i. Then click SAVE & NEXT!

Note: You can also upload any electronic exhibits or other documents pertaining to this job at this step.

Step 3 of 5: Add or prefill parties

- a. Check all ordering parties (It's ok if the box you check for the firm doesn't have the correct attorney's name. You can change this later by clicking the orange pencil after you have saved the prefilled list).
- b. If all counsel is not located in the Prefilled parties you will need to select NEXT! A **New Party** tab will appear. To the right of the new party tab, you will see a magnifying glass . Click on the magnifying glass to look up the firm.
- c. Once you select the Magnifying Glass, an additional screen will appear and you will be asked to enter the firm name (only enter one name of the firm). Select SEARCH!
- d. Double click on the correct Firm (make sure it's the correct office location, the correct city); this will place you back into the **New Party** tab with the correct firm listed.
- e. You will then be able to select the correct Attorney from the drop down list under the **Sold to contact**.
- f. Also check the box listed "Same as Sold To" and make sure the witness is checked. If the job is a rush, please use the dropdown box to list the Rush Type.
- g. Then click NEXT! Repeat this process for all ordering parties.
- h. Once you have finished all orders, click NEXT!

Step 4 of 5: Orders/Services

- a. You can add services by answering "yes" to the question.
- b. Billing Set: Choose Cancellation, CNA, Copy Order or Original Transcript.
- c. Once you choose, you'll have a list of services to select. When adding services, make sure you click the box below to assign those services to the correct ordering party.
- d. Click NEXT when you're done adding services. Should extra services appear by the attorney's name that you did not select, just click the Orange X to delete those services (this happens sometimes).
- e. When you're done adding services to each ordering attorney, click NEXT.

ORIGINAL:

When adding orders to the attorney who set the deposition, always select from the ORIGINAL DROPDOWN BOX BILLING SET:

REPORTER WEBSITE GUIDELINES FOR HG LITIGATION Continued

The setting attorney will be billed for the 0&1 (original and copy). Please make sure you add your appearance fee to the original only. If the ordering attorney requests E-trans. also check the E-trans box. You will need to go to the COPY dropdown box to add additional orders.

COPY:

Select the appropriate copy order item from the COPY DROPDOWN BOX BILLING SET:
NOTE: If several clients are ordering the exact same thing (such as an Etrans only), at the bottom of the screen will be a list of all the parties. Simply select the parties you would like to get the exact order.

Step 5 of 5: Finish turn-in

- 1.) Review all orders, then print or save your worksheet.
- 2.) Select SUBMIT! You must select SUBMIT for your job to appear turned in. Once you have hit submit, this information will go directly to our production and billing departments.

You can go back and change or add additional orders by following the steps listed below.

ADDING ADDITIONAL ORDERS:

- 1.) Once logged in with your user name and password, go to the turn-in screen.
- 2.) In the turn in screen, you will have to change the status of the drop down box from “Not Turned In” to “Turned In”. Enter the job number you wish to add orders to.
 - a. If an Etrans is requested, the attorney’s email address must be entered in Step 1 of 5.
 - b. Go to step 3 of 5 and add only the new ordering Attorney who has requested the order.
 - c. Go to step 4 of 5 and add which services they have ordered by selecting the ordered services from the dropdown box.
 - d. Proceed to step 5 of 5. Print or save your worksheet and select SUBMIT.Once you have submitted the job, Production and Billing will be notified a new order has been entered. They will produce and bill this additional order.

VIEWING PAY-STATEMENTS:

- 1.) Once logged in you can check your pay statement by clicking the Pay Statement tab.
 - a. Click the drop down box “Pay Period”. Select appropriate pay period.
 - b. For more detailed information select Show Details.

Please contact payroll@hglitigation.com if you have any questions regarding your pay statement. Please feel free to contact your Resource Coordinator if you have any questions or concerns.