# Cislo & Thomas LLP PNC Flowchart

PNC Calls/Emails/Fills out website form

Referred to Dan Specifically?
Give call to Dan's Assistant (Ashling)

Referred to a specific attorney?
Collect contact information and notify that attorney

General Call from Google or General Firm Referral?
Give call to Marketing (Christina)

Take Call using PNC Call Form

If consultation is needed, after collecting their information and availability, assign to an attorney.
*Note: All attorneys can handle all matters, these are just some of their preferred work

Patent Request?
- Wook Pak (includes high tech/medical work)
- David Sandelands
- Katherine Sales
- Peter Veregge

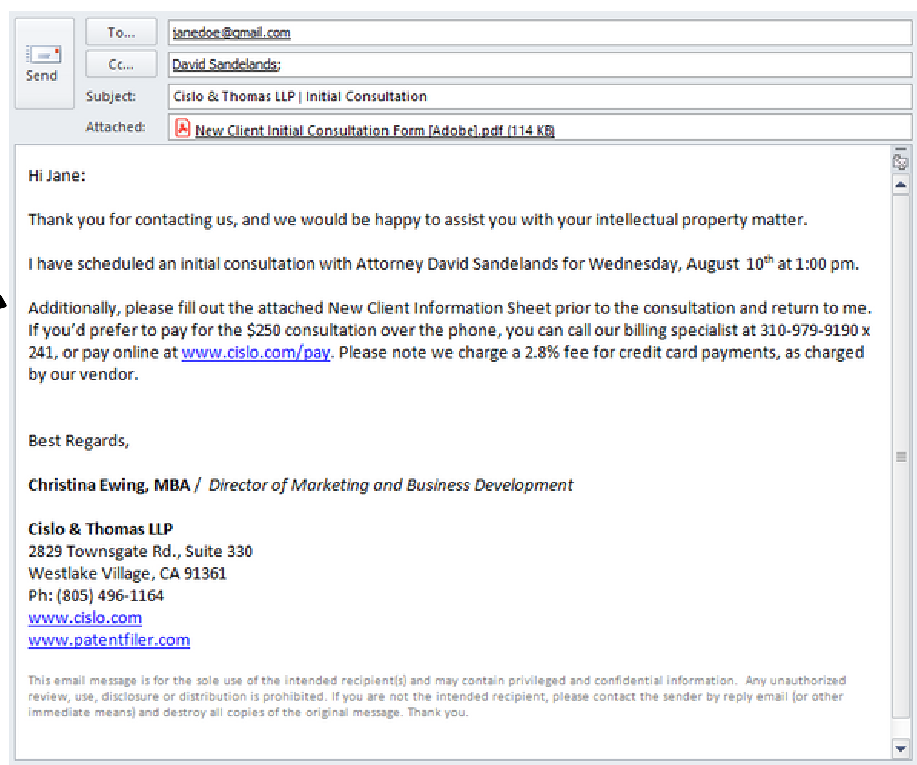
Trademark Request?
- David Sandelands
- Katherine Sales
- Katherine Bond
- Peter Veregge
- Rebecca Makitalo
- Kristin Kosinski

Copyright Request?
- David Sandelands
- Katherine Sales
- Katherine Bond
- Peter Veregge
- Rebecca Makitalo
- Kristin Kosinski

Litigation Request?
- Wook Pak
- David Sandelands
- Katherine Sales
- Katherine Bond
- Peter Veregge
- Kristin Kosinski (if TTAB related)

Email Attorney for their availability and Coordinate with PNC's availability

Email PNC notifying them of scheduled consultation and request to fill out New Client Information Sheet and Payment



To... janedoe@gmail.com
Cc... David Sandelands;
Subject: Cislo & Thomas LLP | Initial Consultation
Attached: New Client Initial Consultation Form [Adobe].pdf (114 KB)

Hi Jane:

Thank you for contacting us, and we would be happy to assist you with your intellectual property matter.

I have scheduled an initial consultation with Attorney David Sandelands for Wednesday, August 10th at 1:00 pm.

Additionally, please fill out the attached New Client Information Sheet prior to the consultation and return to me. If you'd prefer to pay for the $250 consultation over the phone, you can call our billing specialist at 310-979-9190 x 241, or pay online at www.cislo.com/pay. Please note we charge a 2.8% fee for credit card payments, as charged by our vendor.

Best Regards,

**Christina Ewing, MBA** / *Director of Marketing and Business Development*

**Cislo & Thomas LLP**
2829 Townsgate Rd., Suite 330
Westlake Village, CA 91361
Ph: (805) 496-1164
www.cislo.com
www.patentfiler.com

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Add Appointment to Time Matters Calendar
EX.: PNC Consult with Jane Doe (Dave to Handle) (310-979-9190)

Once form is completed and returned, forward form to Dan's Assistant (Ashling) to create matter and secure payment

**Date:__________________**

**NAME:____________________________________**

**PHONE #: _________________________________**

**EMAIL: ___________________________________**

| | |
|---|---|
| **Comments (Type of Work Needed, Important Details, Etc.):** | |
| **Call/Zoom Availability?** | |
| **How did you hear about us?** | |
| **Patentfiler an option?** | YES ____ NO ____ |
| **OK to pay $250?** | YES ____ NO ____ |

C&T

PROCUREMENT AND ENFORCEMENT OF INTELLECTUAL PROPERTY

CISLO & THOMAS LLP
*Attorneys at Law*

PATENT, TRADEMARK COPYRIGHT & RELATED MATTERS

## NEW CLIENT INFORMATION SHEET

Please complete this sheet carefully. We will refer to the information on this sheet to contact you. If any information changes, please be sure to let us know so that we may update our files.

Client Company Name (if applicable): ____________________
(This is the ***full legal name*** of the company)
Type of Company (e.g. corporation, LLC, etc.): ____________________

State incorporated in (e.g. California): ____________________

Client Company d/b/a names (if any): ____________________

Client Contact: Jane Doe
(This is the person you wish all legal correspondence to be directed to, and who has the authority to sign on behalf of the company)

Billing Contact (if different from client contact): John Doe

Street Address: 123 Fake Street, Apt. Z

City: Faketown State: CA Zip Code: 01234

Mailing Address (if different from street address): ____________________

____________________

Main Telephone Number: (310) 979-9190
Main Fax Number: ____________________
Direct Number of Client Contact: ____________________
Cell Number of Client Contact: ____________________
E-mail of Client Contact: janedoe@gmail.com
E-mail of Billing Contact (if different): johndoe@gmail.com
How did you hear about Cislo & Thomas LLP? SMBA

Preferred Payment Method: ☐Credit Card on Form ☒Cislo.com/pay ☐ Called Billing Department
Credit Card Type (circle): ☐MC ☐Visa ☐AmEx
Credit Card Number: ____________________
Expiration Date: __________ Security Code: __________ Zip Code: __________
Check No. (if applicable): __________ Other: __________

*I hereby give Cislo & Thomas LLP the right to charge $250.00 for the initial consultation with attorneys. Any further work will require a written retainer agreement in the absence of any subsequent permission to charge the above card in writing. Cislo & Thomas LLP shall keep confidential all disclosures and shall not use them to its advantage, but only for the client pursuant to California Law.*

Client Signature: Jane Doe Date: 8/4/2022

--------------------FOR C&T OFFICE USE ONLY--------------------

PAYMENT REC DATE: STAFF: NEW MATTER (G1) NO.:

CONSULTATION DATE: ATTY: LOG/TMS: ☐

C&T

CISLO & THOMAS LLP
*Attorneys at Law*

PROCUREMENT AND ENFORCEMENT OF INTELLECTUAL PROPERTY

PATENT, TRADEMARK COPYRIGHT & RELATED MATTERS

## NEW CLIENT INFORMATION SHEET

Please complete this sheet carefully. We will refer to the information on this sheet to contact you. If any information changes, please be sure to let us know so that we may update our files.

Client Company Name (if applicable): ______
(This is the ***full legal name*** of the company)
Type of Company (e.g. corporation, LLC, etc.): ______

State incorporated in (e.g. California): ______

Client Company d/b/a names (if any): ______

Client Contact: Jane Doe
(This is the person you wish all legal correspondence to be directed to, and who has the authority to sign on behalf of the company)

Billing Contact (if different from client contact): John Doe

Street Address: 123 Fake Street, Apt. Z

City: Faketown State: CA Zip Code: 01234

Mailing Address (if different from street address): ______

Main Telephone Number: (310) 979-9190
Main Fax Number: ______
Direct Number of Client Contact: ______
Cell Number of Client Contact: ______
E-mail of Client Contact: janedoe@gmail.com
E-mail of Billing Contact (if different): johndoe@gmail.com
How did you hear about Cislo & Thomas LLP? SMBA

Preferred Payment Method: ☐Credit Card on Form ☒Cislo.com/pay ☐ Called Billing Department
Credit Card Type (circle): ☐MC ☐Visa ☐AmEx
Credit Card Number: ______
Expiration Date: ______ Security Code: ______ Zip Code: ______
Check No. (if applicable): ______ Other: ______

*I hereby give Cislo & Thomas LLP the right to charge $250.00 for the initial consultation with attorneys. Any further work will require a written retainer agreement in the absence of any subsequent permission to charge the above card in writing. Cislo & Thomas LLP shall keep confidential all disclosures and shall not use them to its advantage, but only for the client pursuant to California Law.*

Client Signature: Jane Doe Date: 8/4/2022

---FOR C&T OFFICE USE ONLY---

PAYMENT REC DATE: 8/10/2022 STAFF: ACS NEW MATTER (G1) NO.: 22-XXXXX

CONSULTATION DATE: 8/10/2022 ATTY: DBS LOG/TMS: ☒

# C&T Staff Training
## August 17, 2022 acs

- To be used in conjunction with: PNC Training Document.

I. Making Contact Page
   a. Check Contacts.
      i. Existing Page: Change code from PNC to CLI. Confirm that all the information is updated.
      ii. No Page: Click "Add Contact" and follow steps as provided.

II. Making G1
   a. Confirm with Billing Department that payment was received or to charge PNC.
   b. "Add New" – "Matter" – "Automatic Relation"

1. **Title:** [--] General IP Matters
   a. Last Name, First Name
   b. Company Name
   c. Company Name dba Fictitious Name
2. **Code:** G1 – General Matter (not General File)
3. **Staff:** Most likely Dan!
   a. Exception: PNC is an attorney's personal client (tip: check contact page, who is "Staff"?)
4. **Three Dots** to Arrows for Contact
5. **Billing Preferences:** Billing Email
   a. **G1:** Accounts Receivable - Billing Email
   b. **G2:** Advanced – Consolidate with G1 Matter

III. Logging Attorney's Time to the Matter
   a. Follow steps as provided.

IV. New Client Information Sheet
   a. Save Client's sheet
      i. Title: "New Client Information Sheet"
      ii. Code: CORI
      iii. Staff: Yourself
   b. Print Sheet and Fill-Out
      i. Payment Rec. Date: Check with Billing
      ii. Consultation Date: Christina's Email/Calendar
      iii. Staff: Initials (ACS)
      iv. Attorney: Person meeting with PNC (DBS)
      v. New Matter (G1) No.: (xx-xxxxx)

vi. Log./TMS: Reminder to save to TM & Log Attorney's Time

c. Save Final Sheet

i. Title: "New Client Information Sheet"

ii. Code: ADMIN

iii. Staff: Yourself

V. Emailing Attorney (Paralegal/Legal Asst., Billing, & Christina)

a. Follow format as provided in PNC Training Document.

PNC - Miguel Zepeda-Rosales

AS Ashling Sugarman
To David Sandelands
Cc Stephanie Navarro; Billing Dept Cislo & Thomas LLP; Christina Ewing

Reply | Reply All | Forward | ...

Fri 8/5/2022 3:48 PM

New Client Information Sheet-0001.pdf
306 KB

Hi Dave,

Miguel's initial consultation fee was paid today for your initial consultation on **Monday, August 8th**. The G1 matter is: 22-45742. I have logged your time to the matter already.

Please let me know if myself/Stephanie should draft a No Further Work Letter or Engagement Letter. Thank you!

Best regards,

**Ashling Sugarman** | *Assistant to Daniel M. Cislo*
**Cislo & Thomas LLP**

12100 Wilshire Blvd., Suite 1700
Los Angeles, CA 90025-7103
Tel: (310) 979-9190
Fax: (310) 394-4477
www.cislo.com



VI. Follow-Up with Attorney after Meeting

a. Draft an Engagement Letter (Conflict Check) or No Further Work Letter.

C&T Staff Training
August 17, 2022 acs

## Standard PNC Protocols (Dan's Assistant Handles):

1. Send PNC the New Client Information Sheet over email (Christina handles this step for "Firm" PNCs)

2. Receive the New Client Information Sheet back (Christina usually forwards this to you once she receives it from the PNC)

3. Ask Billing to confirm payment or to charge the PNC.

4. Check to make sure that the PNC does not already have a contact page in Time Matters. If they do, change the Code from PNC to CLI. Then, click the "Billable" box since all clients are billable.

    Note: This step avoids having double contact records of the same person in Time Matters.

    **OR** If there is not a PNC contact for the PNC, or if you are scheduling/handling this PNC on your own, create a new contact record for the client using the code "CLI".

    *For further instructions on how to change a PNC to a CLI or how to create a new CLI contact record see the following pages.*

5. After creating the client contact, open a new G1 matter for the client.

    *For instructions on how to create a G1, see the following pages.*

    Note: All firm PNCs are considered Dan clients regardless of who meets with the PNC, so when creating the client contact and G1 matter, Dan is the "Staff" and the Originating and Responsible Attorney in the Billing Preferences

6. Log the respective attorney time for the consultation if consultation payment was made

    *For instructions on how to log attorney time for the consultation, see the following pages.*

7. Email the G1 matter number to the attorney & billing for the PNC so they can locate the client in Time Matters and apply the payment

8. Fill out the "Office Only" section on the New Client Information sheet and scan and save the completed New Client Information Sheet and any Attorney Notes from the consultation to the G1

9. Ask the attorney (if the attorney does not already tell you) which letter to send to the PNC (initial engagement letter or no further work letter)

10. If we are sending an engagement letter, send a Conflict Check email to "Conflicts" by using the signature outline previously provided. Once the attorney confirms that there is no conflict, send the engagement letter.

11. For Initial Engagement Letters: Follow up as necessary. After 3 Awaiting Responses (Follow-ups) send a Drop Letter.

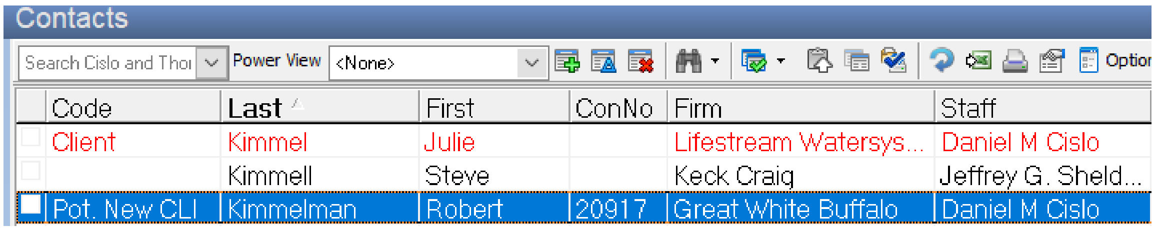
C & T New Client Intake/PNC Procedures and Forms I C&T Ref. No.: 21-44662

- New Client Information Sheet (Print/Adobe Versions)
- Letter to Client Enclosing Engagement Agreement (Current Client)
- Letter to Client Enclosing Engagement Agreement (new client)
- Engagement Agreement
- No Further Work Letter
- New Business Intellectual Property Checklist

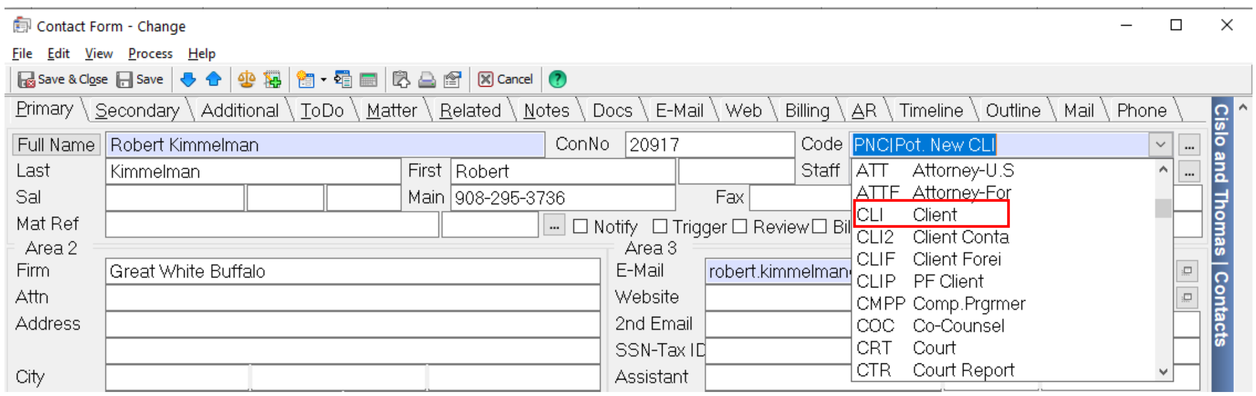
# How to Change a PNC to CLI:

Changing an existing contact record of a PNC to CLI helps avoid having two of the same contact records in Time Matters.

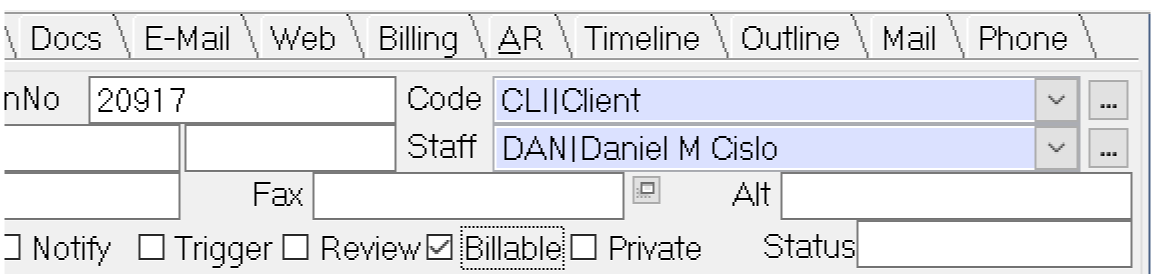
1. In Time Matters, open your Contacts page and find the contact record of the PNC and open the record.




2. In the contact record, change the Code from "PNC" to "CLI"




3. Then click the "Billable Box" to make the client billable




4. Using the executed New Client Information Sheet, fill out any remaining contact information.

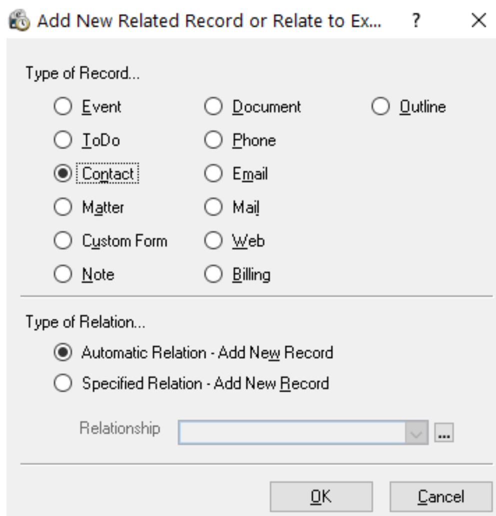
5. Press: "Save and Close".

6. Then, create the client's G1 matter.

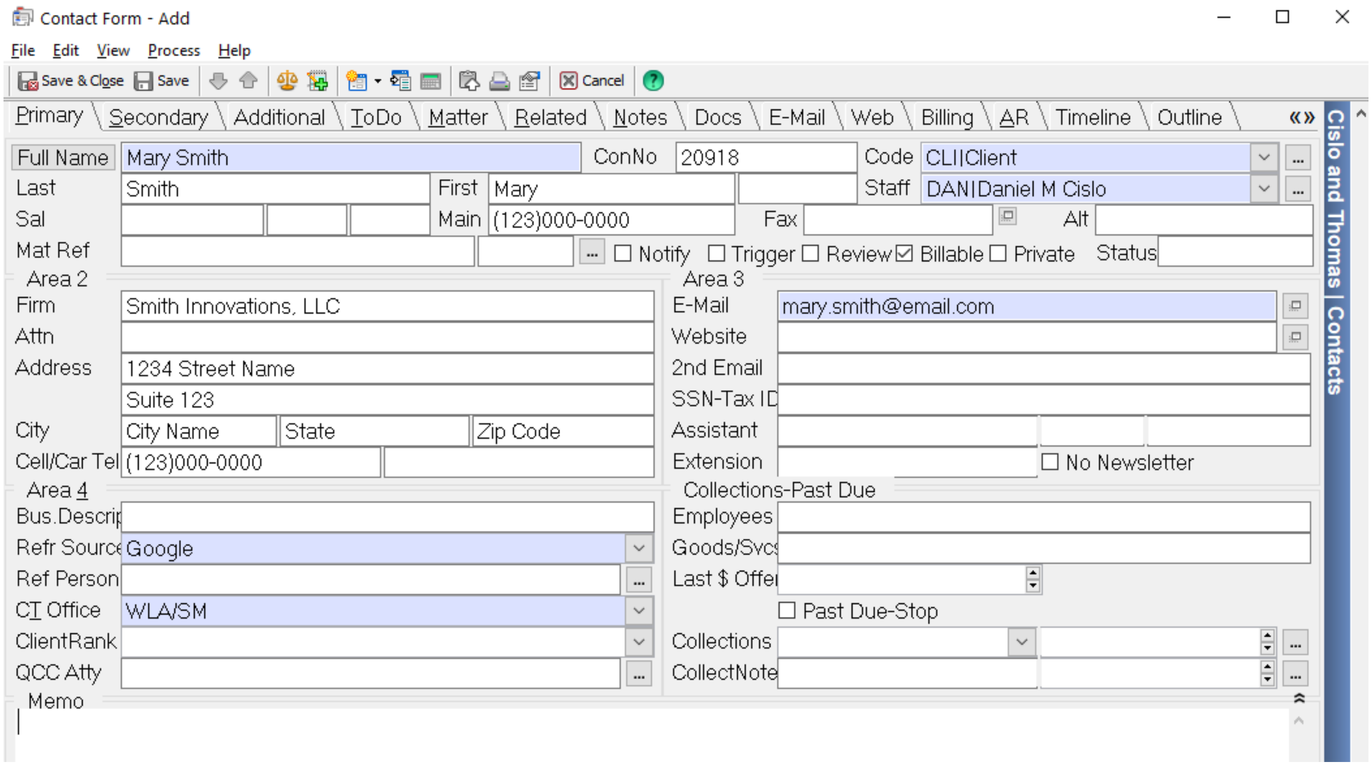
# How to Create a New Client Contact:

1. On the Contacts page in Time Matters, click on the green plus sign to create a new record.


2. In the pop-up window, select “Contact”, then select “Automatic Relation – Add New Record”, press “OK”.



3. Fill out the contact form.

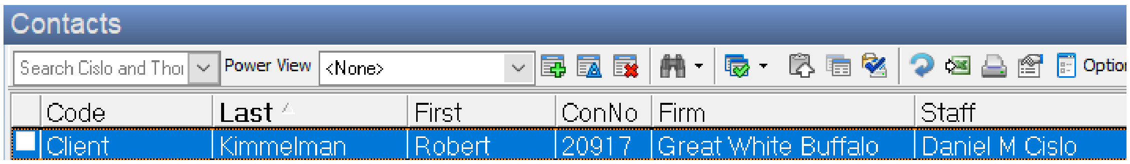



- **Full Name:** First Name, Last Name
- **Code:** CLI
- **Staff:** Dan
- **Main:** Main Phone Number of Client
- **Firm:** Client's Company Name
- **Address:** Client's Mailing Address (if there are 2 addresses, put the mailing one in this field and other address in the memo field)
- **E-mail:** Client's Preferred Email
- **Reference Source:** Choose one of the options from the drop-down menu
- **CT Office:** Choose the office closest to the client's address (WLA or WLV)

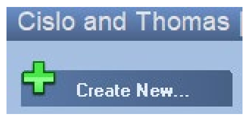
4. Press, "Save and Close".

# How to Create a G1 Matter:

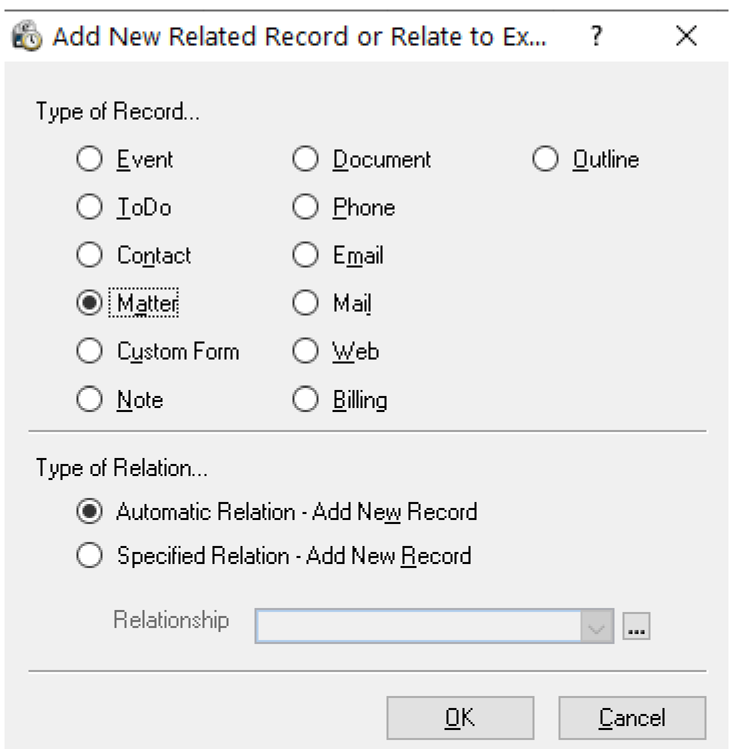
1. Make sure the CLI (Client Contact) has already been saved into Time Matters.
2. On the Contacts page, locate and select the Client Contact, but do not open the contact record.



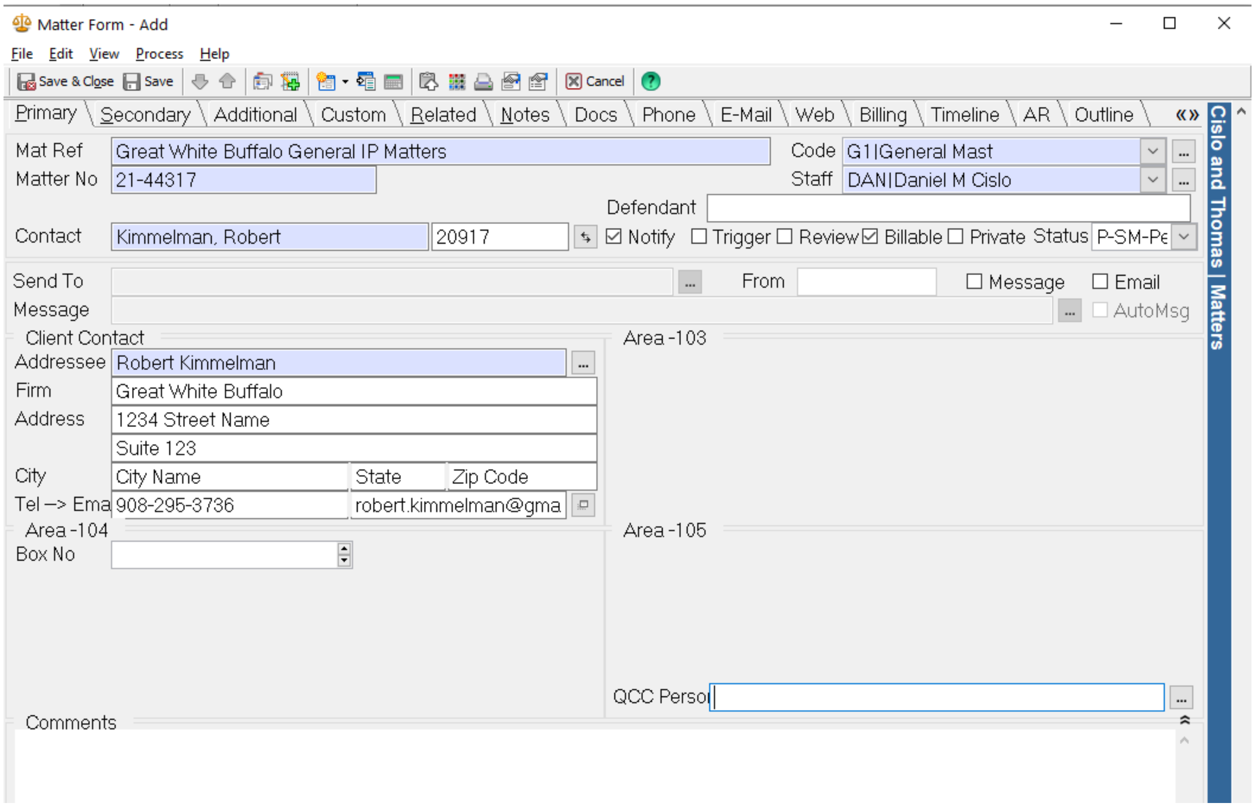

3. On the left-hand side of the Contacts/Matters page, click on the green plus sign to create a new record




4. In the pop-up window, select "Matter", then select "Automatic Relation – Add New Record", press "OK"

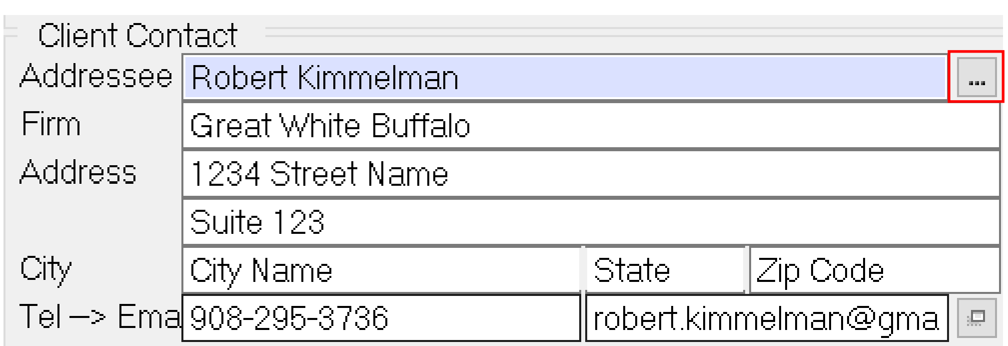


5. In the "Matter Form – Add" window, fill out the following:

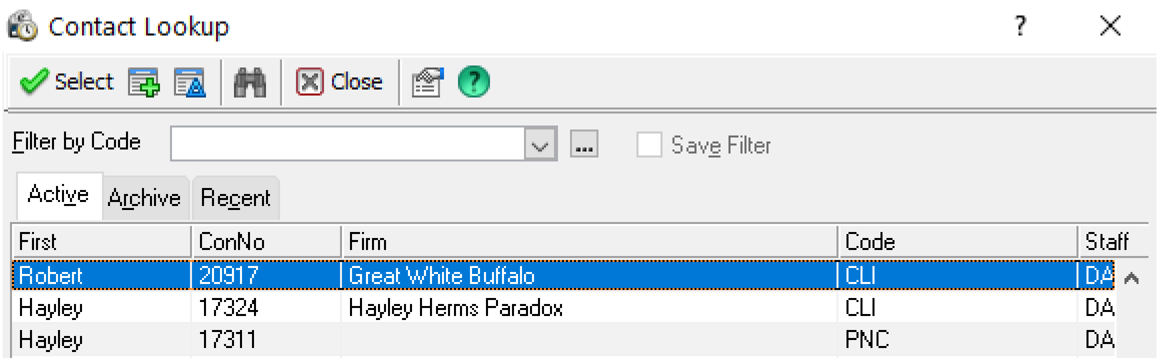


- **Mat Ref:** [Company Name] General IP Matters (If no Company Name then use: [Last Name, First Name] General IP Matters)
- **Code:** G1
- **Staff:** Dan (Usually Dan, unless requested by another Attorney)
- **Status:** Choose one (Usually, "SM or WLV Pending")

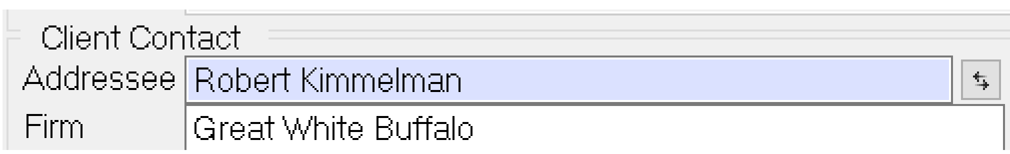
6. In the "Matter Form – Add" window, next to the addressee, find the button with the 3 dots. Click the button.



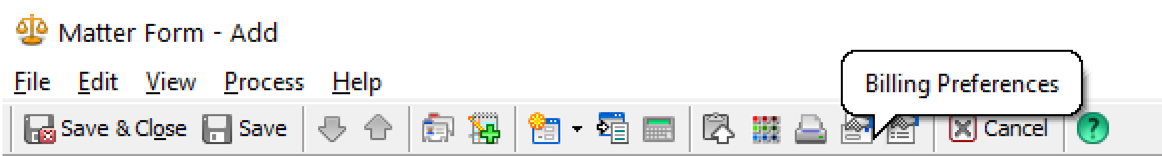
7. A new window should appear, find the client contact with the code "CLI". Double click or press the Green Check to select the client.



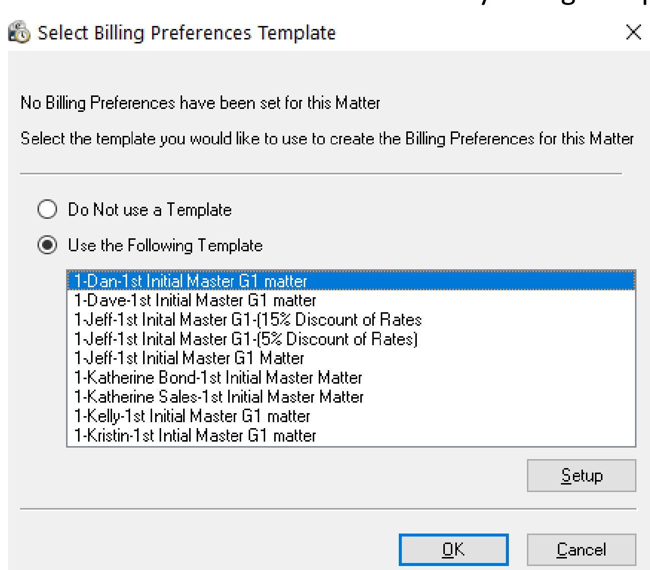

8. Once the client is connected, the button with the 3 dots should have changed to a button with 2 arrows.



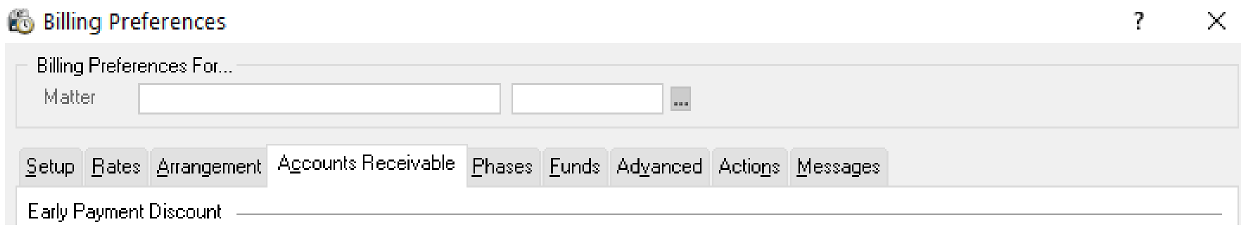

9. At the top of the "Matter Form – Add" window, click on the "Billing Preferences" button.




10. In the Billing Preferences Template page, select the G1 template for the attorney (Usually Dan unless the client is a client that another attorney brought in personally). Press, "OK".

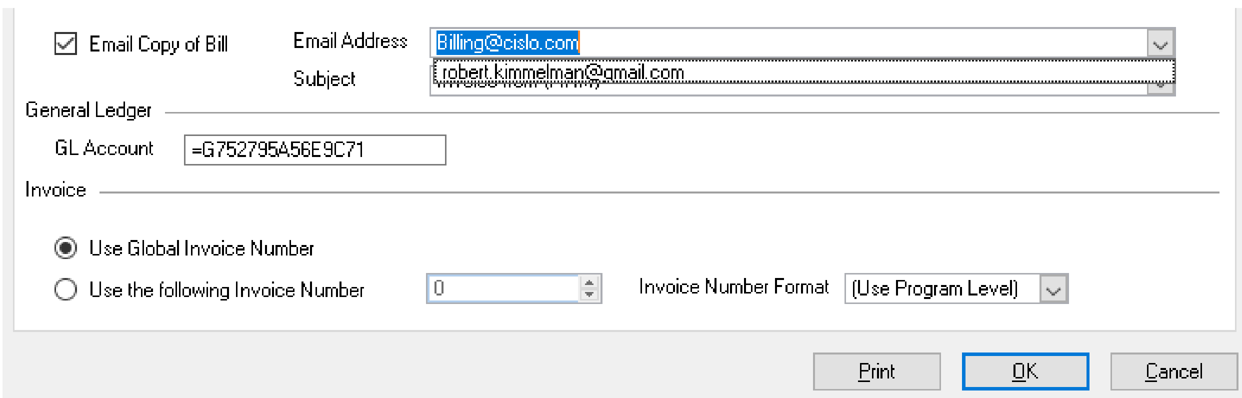


11. A new window should appear. At the top, find and open the “Accounts Receivable” tab.




12. In the email address box, change the email to the client’s email. Then press “OK”.

Note: When making G2’s, this email box should read “hchoi@cislo.com”




13. Press “Save and Close”.

# New Client Information Sheet:

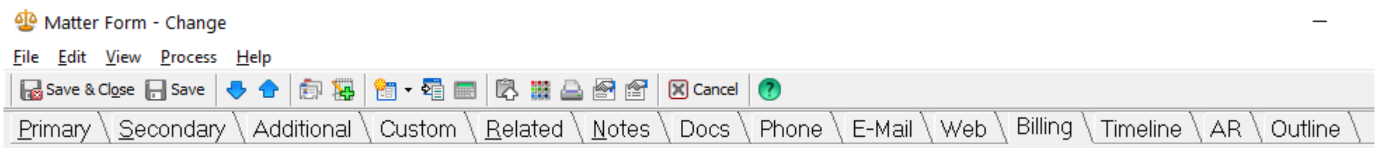
1. Save the PNC's NCIS
   - **Title:** "New Client Information Sheet"
   - **Code:** CORI
   - **Staff:** You

2. Print the Sheet and Fill it Out
   - **Payment Rec. Date:** Check with Billing
   - **Consultation Date:** Christina's Email/Calendar
   - **Staff:** Initials (Ex. ACS)
   - **Attorney:** Person meeting with PNC (Ex. DBS)
   - **New Matter (G1) No.:** (xx-xxxxx)
   - **Log./TMS:** Check box

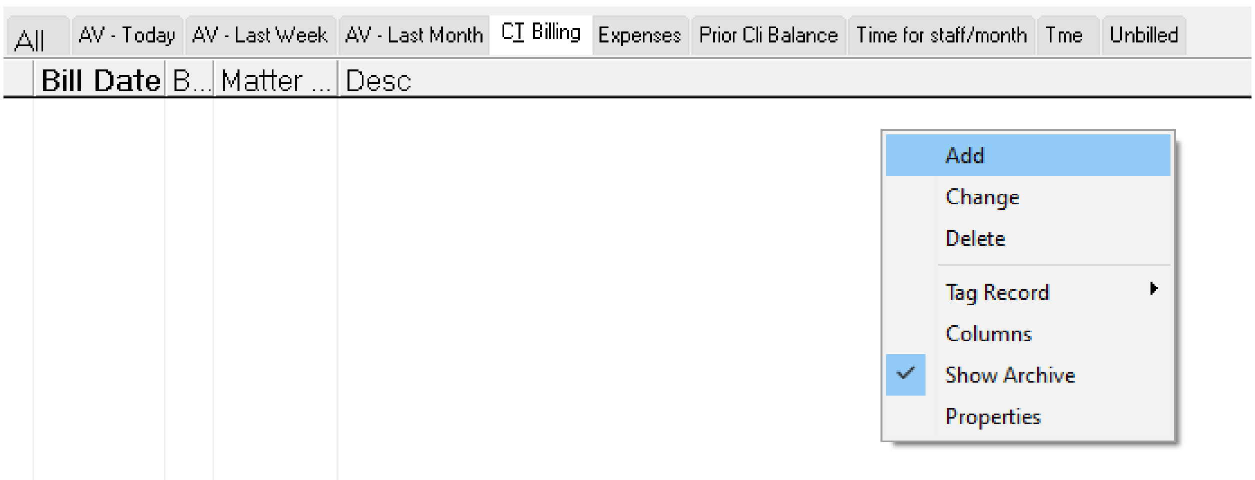
3. Save Final Sheet
   - **Title:** "New Client Information Sheet"
   - **Code:** ADMIN
   - **Staff:** You

# How to Log Attorney Time for Consultations:

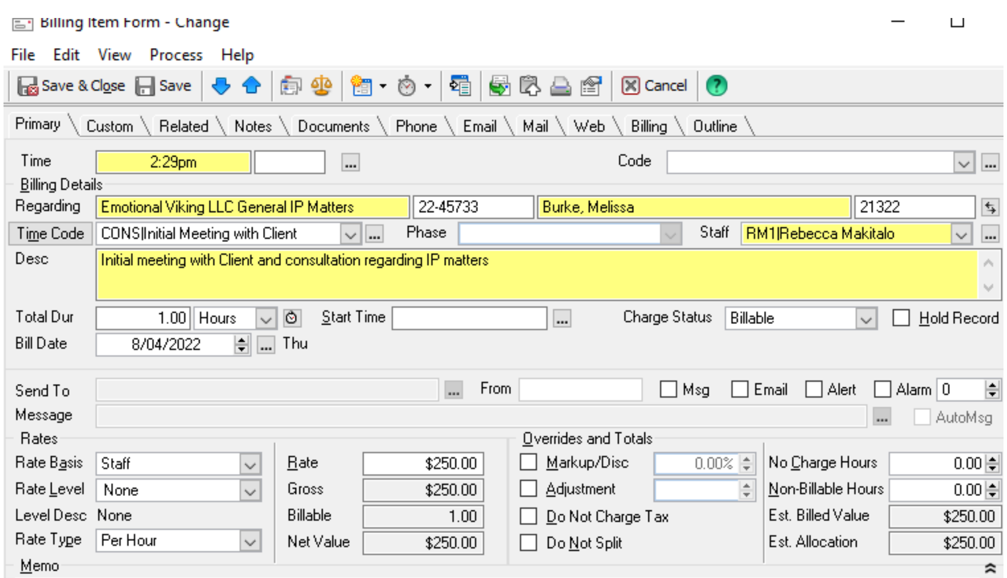
1. Find and open the client's G1. Locate and open the "Billing" tab.




2. In the "Billing" tab, right-click and select "Add"




3. A new window titled, "Billing Item Form – Add" should appear. Fill out the form.




- **<u>Time Code:</u>** CONS (tab over to auto populate)
- **<u>Staff:</u>** Enter the Attorney who handled the consultation
- **<u>Bill Date:</u>** Enter date of initial consultation
- **<u>Description:</u>** (auto populates)

- **Total Dur:** 1.00
- **Rate:** Manually change the rate that was auto populated to: $250.00

4. Press, “Save and Close”.

# Notifying Attorney & Billing Dept:

1. Email Attorney that is meeting with PNC (CC Paralegal/Legal Asst., Billing, & Christina)

*Template:*

Hi [Attorney],

[PNC's] initial consultation fee was paid today. The G1 matter is: []. I have logged your time to the matter already.

Please let me know if I should draft a No Further Work Letter or a LTC enclosing Engagement Agreement. Thank you!

Best regards,

**Ashling Sugarman** | *Assistant to Daniel M. Cislo*
**Cislo & Thomas LLP**

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Los Angeles, CA 90025-7103
Tel: (310) 979-9190
Fax: (310) 394-4477
www.cislo.com



2. Attach the completed New Client Information Sheet to the email.

3. Follow-Up with Attorney after meeting if necessary.
   No Further Work Letter
   Letter to Client Enclosing Engagement Agreement (Conflict Check)