



CHECKLIST FOR CLIENTS AND ATTORNEYS FOR VIRTUAL HEARINGS

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Civil District Hearings: Most Common Mistakes to Avoid

SABA Signature CLE Series

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| CATEGORY | | ACTION ITEMS |
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| <input type="checkbox"/> | REGISTER: ACCOUNT TYPE | <ul style="list-style-type: none"> Click HERE to register for a Zoom account. Free accounts will work for hearings. Remember that the court settings will apply to hearings, so you do not have to worry about the 40-minute limitation. Attorneys are encouraged to purchase the “Pro” version for more functionality. The cost is \$14.99 per month. |
| <input type="checkbox"/> | REGISTER: DOWNLOAD | <ul style="list-style-type: none"> Download the Zoom application to as many devices as you can (computer, phone, tablet, iPad). Always have two ways to connect in case of difficulties with your preferred device. A computer is the easiest way to share and manipulate documents during a hearing. The Zoom desktop client is the best way to use Zoom. You can download the client by logging in and selecting “Download Zoom Client” under the Resources tab. |

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| <input type="checkbox"/> | ZOOM SETTINGS: GENERAL | <ul style="list-style-type: none"> • There are two places to adjust Zoom settings. (1) The administrative settings are on the web (access Zoom.us/profile with your browser). (2) The audio and video settings while Zoom is running are in the Zoom client. • Click HERE to review a list of keyboard shortcuts. |
| <input type="checkbox"/> | ZOOM SETTINGS: ADMINISTRATIVE | <ul style="list-style-type: none"> • Administrative settings are found by clicking "My Account" after you login to Zoom.us/profile. • "Require a password for meetings" is the default setting for Zoom. Don't forget about this when scheduling meetings with your client. • If you have "Mute participants upon entry" selected, make sure your meeting invitees know how to unmute. |
| <input type="checkbox"/> | ZOOM SETTINGS: AUDIO | <ul style="list-style-type: none"> • When joining a meeting, select "Join with Computer Audio." • In audio settings, select "Automatically join audio by computer when joining a meeting" to avoid the audio prompt at the beginning of each conference. • Everyone's favorite shortcut – if you are on mute, hold down the spacebar to make a quick statement – release to go back to mute. • Click HERE for a quick Zoom tutorial on joining meetings with audio and video properly activated. |
| <input type="checkbox"/> | ZOOM SETTINGS: VIDEO | <ul style="list-style-type: none"> • Always use your proper name – no nicknames or initials. • "Gallery View" is best for hearing purposes. Click on the upper-right hand corner to switch back and forth from "Speaker View" and "Gallery View." (Swipe left if using an iPhone or iPad.) |
| <input type="checkbox"/> | ZOOM SESTTINGS: VIRTUAL BACKGROUNDS | <ul style="list-style-type: none"> • Virtual backgrounds for lawyers, clients and witnesses are discouraged. • The lighting in the room will affect your virtual background. If you must use one, make sure you pick even lighting to eliminate distortion and "halo" effects. • If using a virtual background, click HERE for a Zoom tutorial. |

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| <input type="checkbox"/> | ROOM/OFFICE SETTINGS | <ul style="list-style-type: none"> • Pick a room where you can close the door. • Have everything close that you may need – paper, pen, water, tissues, glasses. • Do not hold the phone, camera, or tablet during the call. • Position the camera so that your entire head and neck visible, and fill roughly 1/3 to 1/2 of the video window. • Look all around the room – remove clutter and any pictures, posters, etc. that are distracting or potentially offensive (if you're debating whether something is offensive, remove it). |
| <input type="checkbox"/> | ROOM/OFFICE SETTINGS: CONNECTIVITY | <ul style="list-style-type: none"> • A direct connection (wired) to your router is always the best option. • If you cannot directly connect, sit as close to the router as possible. • If you can't do either of the above, make sure your router is as centrally located in your area as possible, and do not set it on the floor. • Power off all devices not in use so they do not split your WiFi bandwidth. |
| <input type="checkbox"/> | ROOM/OFFICE SETTINGS: LIGHTING | <ul style="list-style-type: none"> • Lighting at eye level from behind the camera works best. • Overhead lighting should be dimmed, if possible. |
| <input type="checkbox"/> | ROOM/OFFICE SETTINGS: SOUND | <ul style="list-style-type: none"> • Eliminate as much background noise as possible. • Do not call from a moving vehicle. • Turn off sound notifications on emails and other notification settings. Click HERE for instructions on turning notification sounds off (Windows). Click HERE for instructions on turning email sounds of (Outlook). |
| <input type="checkbox"/> | PRACTICE | <ul style="list-style-type: none"> • Practice, practice, practice – Zoom with friends and family is great practice, but also practice question and answer with your client. • There are thousands of training and YouTube videos available. Click HERE for the official Zoom help guides. • Practice sharing ALL types of file – video, audio only, pictures, and documents. Practice annotating documents. Practice sharing only a portion of the screen. |

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| <input type="checkbox"/> | REVIEW COURTHOUSE RULES | <ul style="list-style-type: none"> • Check HERE for the latest Bexar County District Court updates. The San Antonio Bar Association also provides comprehensive information. • Use the Bexar County settings/fiat form provided by the District Courts. Click HERE for the latest version. • Familiarize yourself with Dropbox and Google Drive – both have free versions and are frequently used in court. • CONFER ON ALL ITEMS – time announcements, witnesses, exhibits. • Email civildistrictpresiding@bexar.org if there is a change in your hearing (dropped, agreed, etc.) • For interpreters (other than Spanish) and sign language, call Liz at court administration at (210) 335-2300 at least 24 hours before the hearing. |
| <input type="checkbox"/> | PREPARE CLIENT/CASE | <ul style="list-style-type: none"> • Prepare your digital file in a similar way to what the Court expects: one folder for Pleadings, one folder for Exhibits (Admitted), and one folder for Exhibits (Not Admitted). • Save every document as a searchable PDF. Click HERE for instructions on how to save a file as a PDF. • If two people involved in the hearing are in the same location, make sure they are on different devices and in different rooms with a closed door between them. |
| <input type="checkbox"/> | PREPARE CLIENT/CASE: EXHIBITS | <ul style="list-style-type: none"> • Produce and provide proposed exhibits to your client as soon as possible for review. Remind them that the exhibits will be produced to opposing counsel before the hearing. • Premark your exhibits with a digital sticker. Click HERE for Adobe instructions on creating exhibit stickers. Click HERE for a detailed YouTube tutorial on how to make a digital sticker in Adobe Acrobat DC or similar paid versions. • If you do not have a digital sticker, scan your document after it is marked. Another option is to type your exhibit number using text. • Save the exhibits so that they are easily identifiable (ex. Petitioner's #1 – Police Report). |

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| <input type="checkbox"/> | PREPARE CLIENT/CASE: PLEADINGS | <ul style="list-style-type: none"> • Make sure all live pleadings are available to the Court. • Highlight those pleadings that will be useful to the Court during the hearing. • Create a pleading index with links to the pleadings or embedded documents. |
| <input type="checkbox"/> | PREPARE CLIENT/CASE: RULES | <ul style="list-style-type: none"> • Review T.R.E. Rule 612 with clients. No notes or files should be in front of the witness during testimony. • Tell all clients and potential witnesses about T.R.E. 614, "invoking the Rule." Have the client inform all friends and family that if they watch the proceedings, they may not be allowed to testify. |
| <input type="checkbox"/> | PREPARE CLIENT/CASE: DRESS | <ul style="list-style-type: none"> • Courthouse Rules! Lawyers should appear in suits/professional attire. Clients and witnesses should appear in church or business dress. • Solid, medium tones look best on camera. |
| <input type="checkbox"/> | HEARING DAY | <ul style="list-style-type: none"> • Make sure all devices are on and fully charged or plugged in. • Clean your camera lens. • Don't forget that you and your client are always on camera! Assume you are not muted. Watch your facial expressions and hand gestures. • The Courts require that you not turn off your video during the hearing. • If you need a break or to confer with your client in private – ask! • Be patient – every hearing has a mistake or technical glitch. |