



2011

EDUCATIONAL

CONFERENCE

SEATTLE, WA

## TABLE OF CONTENTS

Agenda .....	3
Biographies .....	4
Opening Remarks .....	12
How to Deal with High Profile Cases .....	13
Wired for Justice? Smart Phones & Smart Jurors .....	20
Judicial Security.....	21
Lexis Nexis .....	23
Aging/Wellness in Chambers .....	35
Social Networking .....	35
Learning & Development of Chambers Staff.....	38
Doing More with More .....	39
JSAG and the AO .....	41
Temporary Duty Assignments .....	42
Agenda for FJAA Board of Directors Business Meeting .....	44

**FEDERAL JUDICIAL ASSISTANTS ASSOCIATION  
2011 ANNUAL EDUCATIONAL CONFERENCE  
October 6-9, 2011**

**Thursday, October 6, 2011**

- 3:00 p.m. - 5:00 p.m. Executive Board Meeting  
3:00 p.m. - 5:00 p.m. Registration  
6:00 p.m. - 9:00 p.m. Opening Reception - Seattle Marriott Waterfront

**Friday, October 7, 2011**

- 7:30 a.m. Continental Breakfast  
7:30 a.m. - 8:30 a.m. Registration  
8:30 a.m. - 8:45 a.m. Welcoming Remarks from the Conference Committee  
and FJAA President, Gwendolyn Hunter  
8:45 a.m. - 9:00 a.m. Welcome to Seattle, WA - U.S. District Judge Robert S. Lasnik  
9:00 a.m. - 10:00 a.m. U.S. District Judge Richard A. Jones  
Handling Difficult Cases  
10:00 a.m. - 10:15 a.m. Break  
10:15 a.m. - 11:30 a.m. U.S. District Judge Ricardo S. Martinez  
Technology and Jurors  
11:30 a.m. - 1:00 p.m. Lunch  
1:00 p.m. - 2:00 p.m. Deputy U.S. Marshals Craig Nelson and Raymond Fleck, Judicial Security  
2:00 p.m. - 3:00 p.m. Betsy Post-Garza, Esq., Lexis Representative  
3:00 p.m. - 3:15 p.m. Break  
3:15 p.m. - 3:45 p.m. Judge Phyllis Hamilton, 9<sup>th</sup> Circuit, Aging/Wellness in Chambers  
4:30 p.m. - 9:15 p.m. Optional Event- Royal Argosy Dinner Cruise

**Saturday, October 8, 2011**

- 8:00 a.m. Continental Breakfast  
9:00 a.m. - 10:15 a.m. David Decker, Director of Information Technology  
Social Networking and Computer Security  
10:15 a.m. - 10:30 a.m. Break  
10:30 a.m. - 11:30 a.m. Rosann Crawford, Chief Training Staff AO  
11:30 a.m. - 1:00 p.m. Lunch  
1:00 p.m. - 2:00 p.m. Lou Gil, Director San Antonio Training Center  
2:00 p.m. - 3:00 p.m. JSAG presentation  
3:00 p.m. - 3:15 p.m. Break  
3:15 p.m. - 4:30 p.m. Stephanie Lawley, Judicial Assistant, Temporary Duty Assignments (TDY)  
at the Administrative Office  
6:00 p.m. - 9:00 p.m. Banquet

**Sunday, October 9, 2011**

- 8:30 a.m. - 9:00 a.m. Continental Breakfast  
9:00 a.m. - 11:00 a.m. FJAA General Business Meeting (All Members are encouraged to attend)  
11:00 a.m. Conclusion of 2011 Annual Conference

Please note that topics and speakers are subject to  
change due to circumstances beyond FJAA's control.

**Annual FJAA Educational Conference  
Seattle, Washington  
October 6 - 9, 2011**

**Welcome**

**Honorable Robert S. Lasnik  
United States District Court  
Western District of Washington, Seattle**

Judge Robert S. Lasnik just completed his seven year term as Chief Judge of the Western District of Washington in 2011. He was appointed to the United States District Court by President Clinton in 1998. Prior to that he served as a King County Superior Court Judge for nine years. He formerly was Chief of Staff in the King County Prosecutor's Office. Judge Lasnik graduated from Brandeis University with a degree in psychology and sociology and later obtained two Master's degrees from Northwestern University in journalism and in counseling. He is a graduate of the University of Washington School of Law and was an instructor there in Interviewing and Counseling for Lawyers.

In 2010, Judge Lasnik was elected by the District judges of the Ninth Circuit to represent them on the Judicial Conference which is the governing body of the federal courts and is chaired by Chief Justice John Roberts. He served for five years on the National U.S. Budget Committee where he chaired the Congressional Outreach Subcommittee. Within the Ninth Circuit he chaired the Public Information and Community Outreach Committee for four years, served as Program Chair for the 2006 Judicial Conference, Conference Chair in 2007 and served on the Circuit's Judicial Council from 2007 - 2009.

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**Honorable Richard A. Jones  
United States District Court  
Western District of Washington, Seattle**

The Honorable Richard A. Jones is a United States District Court Judge for the Western District of Washington in Seattle, Washington. He served as a King County Superior Court Judge for 13½ years before his appointment to the federal bench in 2007. Judge Jones received a Bachelor of Public Affairs degree from Seattle University in 1972 and is a 1975 University of Washington Law School graduate.

Judge Jones serves on several boards and committees including the National Board of the YMCA of the USA, Washington State Bar Association's Washington Leadership Institute, National Center for Courts & Media, and the Center for Children & Youth Justice. He co-founded two Seattle area law student programs: the Northwest Minority Job Fair and First Year Minority Clerkship Program. He's been a board member with the YMCA of Greater Seattle for nearly 20 years. He served as YMCA Board President from 2000 - 2002 and was honored in 2007 with the YMCA's A.K. Guy Award for his exceptional volunteer contributions to the community.

Judge Jones received Outstanding Judge Awards in 2004 from the Washington State Bar Association, Washington State Trial Lawyers Association, Asian Bar Association of Washington State, and King County Bar Association. Also in 2004, he received the Alumnus of the Year Award from Seattle University. Seattle University's Access of Justice Institute gave Judge Jones an Award of Distinction in Public Service in 2006.

He received a Doctor of Humane Letters Honorary Degree from St. Martin's University in 2008 and most recently received a Doctor of Laws Honorary degree from Gonzaga University in 2010. Judge Richard A. Jones was inducted into Honorary Membership in the Washington Chapter of The Order of the Coif and was selected as a University of Washington School of Law Distinguished Alumnus.

### **How to Deal with High Profile Cases**

The critical ingredient to dealing with high profile cases is preparation and anticipation which will prevent needless perspiration. This will be primarily about things that can be done well in advance in order to avoid unnecessary headaches. Information about media contacts and a media guide are available.

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**Honorable Ricardo S. Martinez**  
**United States District Judge**  
**Western District of Washington, Seattle**

Judge Martinez holds a Bachelor of Science degree from the University of Washington, Seattle (1975), and a Juris Doctorate degree from the University of Washington School of Law, Seattle (1980).

He currently serves on the Ninth Circuit Alternative Dispute Resolution Committee and is a member of the Federal District Court Judges Association. He is a founding member of the Washington Leadership Institute, and a member of the American Judicature Society. He has held membership in the Federal Magistrate Judges Association; the Washington State Bar Association; the King County Bar Association; the Washington State Hispanic Bar Association; the National Association of Drug Court Professionals; and Order of the Coif. He currently serves as a United States District Judge for the Western District of Washington. He was nominated by President Bush on October 12, 2003 and confirmed by the Senate on June 15, 2004.

Judge Martinez has served as a United States Magistrate Judge for the Western District of Washington from June of 1998 to June of 2004. He previously served for almost nine years as a Judge of the Superior Court for King County. He was appointed to that position by Governor Booth Gardner on March 23, 1990. He took his oath of office on April 17, 1990 and was elected unopposed for every term until his appointment to Federal Court. He has served as a general trial judge in the Civil, Criminal and Juvenile departments of Superior Court. During his tenure on the Superior Court bench he gained extensive experience in all aspects of case disposition including serving as the trial judge in a death penalty case. He was responsible for the inception of the first Drug Diversion Court in the state of Washington. He served as the Drug Court Judge in County from 1994 to 1997.

**Wired for Justice? Smart Phones and Smart Jurors**

In today's wired world can we truly stop Jurors from seeking outside information? Does outside research truly bias jurors? Should trial procedures, instructions, and evidentiary rules be revised?

And, Media in the Courtroom? What should and shouldn't be allowed?

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**Raymond F. Fleck, Supervisory Deputy Judicial Security  
United States Marshal , Western District of Washington, Seattle**

**Craig J. Nelson, Judicial Security Inspector  
United States Marshal , Western District of Washington, Seattle**

Ray Fleck has been with the United States Marshals Service for 15 years, the last two in the

Western District of Washington. As the supervisor for Judicial Security Services, he oversees both the physical security of his district's facilities as well as investigating threats against judges and their staff. Prior to Seattle, he was assigned to the Centers for Disease Control and Prevention as a member of the Strategic National Stockpile program that provided counter-terrorism and force protection.

Deputy United States Marshal Craig Nelson has 20 years of experience in Law Enforcement and has been with U.S. Marshals Service for 16 years. He is currently the Judicial Security Inspector and as such, oversees the security operations of the U.S. Court facilities in Western Washington. He also serves as the direct liaison between the Judges and the Marshals Service.

### **Judicial Security**

Identifying threats and “inappropriate communication” (IC). What’s the difference between them and what do you do when you receive a threat or IC?

Judicial Assistants serve as the principle link between the U.S. Marshal Service and the judiciary. We will discuss the important role Judicial Assistant’s play in investigating Inappropriate Communications and more specifically, in identifying sovereign citizen filings.

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**Betsy Post-Garza, Esq.**  
**LexisNexis Representative**

Betsy Post-Garza is the Senior Government Consultant and Account Manager for LexisNexis in the California Region. She has managed state and local government accounts in five states and Washington, D.C. In January, 2008, she was promoted to Senior Government Consultant. She was the recipient of the Shelly R. Miller Memorial Award in 2009.

Prior to joining LexisNexis, Ms. Post-Garza was an attorney in Washington, D.C.

### **Lexis Update**

Learn how to go beyond case law and statutes with the expansive content of LexisNexis at [www.lexis.com](http://www.lexis.com). If you are a novice or a more experienced online researcher who wants a refresher, this course is for you. You'll cover the basics, including screen layout, retrieving individual documents, selecting sources, searching for documents, viewing documents, using the

Focus feature to search within your results set, and printing & downloading. This instruction will cover the Shepard's Citation Service and also how to check quotes in legal documents instantly

Finally: You'll get a "sneak peak" of the *new* LexisNexis user interface that will be released toward the end of 2011—*Lexis Advance!* This new interface will transform the way you conduct legal research. Tired of source selection and tabs? Love the way Google works? You will love *Lexis Advance!*

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**Honorable Phyllis J. Hamilton  
United States District Judge  
Northern District of California, San Francisco**

United States District Judge Phyllis J. Hamilton was appointed in May 2000 by President William Clinton to serve as a United States District Judge for the Northern District of California, in San Francisco. In April 1991, Judge Hamilton was appointed as a United States Magistrate Judge and served the Northern District of California in that capacity until her elevation to the District Court. Prior to her federal judicial career, Judge Hamilton served as a Court Commissioner in the state court for Alameda County and as an administrative judge for the United States Merit Systems Protection Board. Before her judicial career she practiced law as a deputy public defender for the California Office of the State Public Defender. Judge Hamilton received her B.A. degree from Stanford University and her J.D. *cum laude* from Santa Clara University. In addition to her membership on various committees of the Northern District of California and the 9th Circuit, she currently serves as the Chair for the 9th Circuit Wellness Committee.

**Aging & Wellness in Chambers**

Judge Hamilton will speak about the history and work of the 9th Circuit Wellness Committee, the expanding wellness initiative within the federal judiciary and the importance of raising awareness of health issues among all judiciary staff.

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**David Decker, Director of Information Technology (IT)  
United States District Court, Western District of Washington, Seattle**

Dave Decker has been an IT Director for the Western District of Washington since 2008. He began his career with the federal court as a U.S. Probation Officer in 1996 where he became one

of the first cyber-crime specialists in U.S. Probation history. Dave is a Microsoft Certified Systems Engineer and he began working in Western Washington District Court's IT Department in 2000. He developed and delivers the District's annual security training which is provided to all staff.

**Social Networking**

Social Networking and information sharing via the internet have become increasingly integrated into all aspects of our work and personal lives. This allows us to be more productive and connected than ever before, however, not without certain risks. This session will provide you with the information you need to know in order to use these new capabilities as safely as possible. We'll demystify the terms you frequently hear but don't really understand, give you important information you'll be glad to have when using the internet and give you tips you can use right away to make yourself safer at work and at home.

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**Rosann Crawford, Chief,  
Office of Human Resources Training Staff**

Rosann began her career as a teacher in the public school system in Charles County, Maryland. She then made a career change and began working for the federal government at the Office of Personnel Management before transferring to the Administrative Office of the United States Courts (AO) in 1990. Rosann has worked in several different areas in OHR. Initially she worked in the policy area, then benefits, and now training. As Chief of the OHR Training Staff, she finds it very exciting leading a group that is building an environment of continuous learning for judiciary employees.

**Learning and Development for Chambers Staff (Virtual Presentation)**

This session will discuss a process that has been successful in requesting and receiving approval for use of the Chambers Training Fund to attend an association meeting. It will also discuss a new tool, the Chambers Administrative Staff Learning Guide soon to be introduced in the Judiciary Learning Matrix. The new learning guide will be available shortly to assist chambers staff in discovering other learning and development options that are available.

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**Lou Gil, Director  
San Antonio Training Center**

Lou Gil has been employed by the Systems Deployment and Support Division of the Administrative Office for thirteen years. During his thirty year training career, he has worked as a training developer and presenter for several major financial and customer service oriented corporations and as an independent training consultant. Lou began his tenure with the SDSD training in the Judge's Automation training program. Since then, he has been the primary developer and trainer for the Train-the-Trainer program and has been involved in the development of various electronic learning modules offered by the SDSD.

**Doing More with More**

A presentation about the importance of effective communication in this budget environment.

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**Debra Newman, CP Certified Paralegal  
U.S. Magistrate Judge Valerie P. Cooke  
United States District Court, Reno, Nevada**

Debra Newman received her professional legal secretary diploma from Morrison University in 1992. She went on to obtain certifications in paralegal studies and advanced legal research and writing from the University of Nevada, Reno in 1994. Debra successfully sat for the CLA exam offered by the National Association of Legal Assistants (NALA) in 2006 and now meets the qualifications as a Certified Paralegal.

Debra has worked for Magistrate Judge Valerie Cooke since October 1995 when she began working at the law firm of McDonald Carano Wilson LLP. She then was fortunate enough to be asked to join Judge Cooke as her Judicial Assistant upon her appointment in November 1999. As judicial assistant, Debra has volunteered to serve on various committees, including the CM/ECF implementation, CLEAR Court and Inmate Mediation committees.

For five years, Debra served on the board of the Sierra Nevada Association of Paralegals (SNAP) and was elected to serve as president from 2003 - 2005. SNAP coordinates an educational seminar for its members each year and organizes monthly continuing legal education luncheons. In 2002 and 2004, SNAP proudly hosted the National Association of Legal Assistants (NALA) in Reno for their annual National Convention.

Debra served on the FJSA board from 2005 to 2009 as secretary, vice president, president-elect, and president. She was the chair of the 2008 Albuquerque conference committee, and also served on the annual conference committees in 2004, 2009, and 2010.

Debra is currently the Ninth Circuit Representative on the Judges Secretaries Advisory Group to the Administrative Office of the U.S. Courts.

**JSAG & the AO: A Partnership for Advice,  
Assistance & Education for Judicial Assistants**

An overview of the Judicial Secretaries Advisory Group, its function, responsibilities, membership, mission, and current projects.

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**Stephanie Lawley, Judicial Assistant for the Honorable Timothy M. Burgess  
United States District Court, District of Alaska**

Ms. Lawley has been a Judicial Assistant to the Honorable Timothy M. Burgess, U.S. District Judge for the District of Alaska for five years. Prior to her employment with the U.S. District Courts, she worked for the Alaska State courts as an In-Court Deputy for 10 years, for the Alaska Judicial Council and for the President of the Alaska State Senate. Stephanie received her B.A. in Criminal Justice from Stephen F. Austin State University in Nacogdoches, Texas and her Master's in Public Administration from the University of Alaska Anchorage.

In addition to serving as your 9<sup>th</sup> Circuit FJAA Representative for the past two years, Stephanie is active in Special Olympics Alaska, the American Society for Public Administrators, and the University of Alaska Alumni Association. Stephanie has two daughters—one in graduate school in Manhattan; one who is a flight attendant for Alaska Airlines based in Seattle; and a son who just started college this fall.

**Temporary Duty Program (TDY)**

This presentation will outline the opportunities available for Judicial Assistants as part of Judiciary's Court/AO Exchange Programs, which are designed to facilitate the movement of staff between the courts and the AO. The Temporary Duty (TDY) Program provides an opportunity for qualified Court and AO staff to work on projects outside their regular work responsibilities.

Also, Chambers staff personnel have opportunities to work at the AO on a variety of projects.

Assignments range from a few weeks to several months, depending on the needs of the project and availability of staff. Because most projects will be subject-based, there are discrete starting and ending points for each project. The program is designed to be flexible and to accommodate the needs of the courts, the AO, and the participants. Some projects will be based only on-site, while others will allow for a combination of tele-working and travel to and from the home and TDY sites.

The TDY program is designed for subject matter experts who have the interest and qualifications to contribute to work on projects outside their regular work responsibilities. Chambers staff will benefit by working on projects that may affect the Judiciary as a whole while gaining valuable knowledge and information to take back to their courts.



## OPENING REMARKS

Gwen Hunter opened the conference with a big thank you to the Seattle Conference Committee for all of their efforts and to everyone who helped her make this a great year. She enjoyed her term.

Judge Robert Lasnik, former chief judge, started off our program with this welcomed comment: **“Anyone who doesn't have a judicial secretary should have their head examined!”** He received a resounding round of applause! He indicated that he is now on the executive budget committee and is a strong advocate for judicial assistants, so we should rest assured that we have someone in Washington, D.C. on our side. He also gave us:

### Ten Commandments of Chief Judges

- Know your court culture
- Recognize that there are very few battles worth taking on if there will be bad feelings among colleagues
- Thank your staff at every opportunity
- Honor thy clerk of court
- Reinforce the notion of a court family, it is a family
- Be kind to your state court colleagues
- Learn to say no
- Stay humble
- Make life as easy as possible for your senior judges
- Be grateful, it's a wonderful opportunity



# 2011 FJAA EDUCATION CONFERENCE SUMMARY

## The Honorable Richard A. Jones – How to Deal with High Profile Cases



- Creation of a General Media Order and Public Information Guide
- Creation of a Media Notebook with instructions about Courthouse policies, where media can assemble, courtroom etiquette, etc.
- Set up a pre-trial or pre-hearing meeting with media reps to review media notebook and to answer any questions.
- Review with Marshals on the judge's expectation for reasonable enforcement.

Judge Jones discussed how he deals with the media in high profile cases. He suggested that you put together a media package for your judge to use when needed. Check out J-Net: [http://jnet.ao.dcn/District/Outreach\\_Catalog/Media\\_Relations.html](http://jnet.ao.dcn/District/Outreach_Catalog/Media_Relations.html). Also keep a press log with the date, time, who you spoke with, questions asked and what the answers were. Check out J-Net for info on handling high profile district cases: <http://jnet.ao.dcn/News/Moussaoui.html>. Also online is a Journalists' Guide to the Federal Courthouse. <http://www.uscourts.gov/uscourts/News/docs/JournalistGuide2011.pdf>. They also keep on their court's web page general information about parking, where to sit, etc.

Judge Jones was kind enough to share the three documents he created. Here is the body of the General Media Order:

The above-entitled Court, in the interest of providing the parties a fair trial, preserving the dignity of the judicial process and allowing the media reasonable access to proceedings in this matter, enters the following orders, which shall apply to all future proceedings in this case:

1. The Court has created a "Media Information Guide," which contains relevant information regarding the logistics, procedures and guidelines for media coverage of the proceedings in this matter. Each member of the media who receives a Press Pass shall provide a written acknowledgement of receipt of a copy of the Media Information Guide. The sole purpose of the acknowledgement is to verify receipt of the order, not a restriction on access to the court. The Court's rules of conduct, both within the courtroom and within the courthouse, are contained in the Media Information Guide and all members of the media covering the proceedings within the courthouse will be expected to abide by those rules.

2. The Judicial Conference of the United States (JCUS), the governing body of federal courts, has issued a policy which forbids the broadcasting, televising, recording or photographing of civil or criminal proceedings for the purposes of public dissemination. This policy is set forth in the JCUS publication *A Journalist's Guide to the Federal Courts*, page 14, "Broadcasting the Trial." In accordance with that policy, there will be no cameras (including cell phone cameras), recording devices, or broadcast devices of any kind permitted within the courtroom during the course of the trial or any other hearings associated with this matter.

3. Furthermore, there will be no activated electronic device of any kind permitted within the courtroom while the trial or any other hearings in this matter are in session. All electronic equipment of spectators and members of the media (including, but not limited to, laptop computers, cell phones, BlackBerries, radios, and pagers) must be turned off or deactivated while inside the courtroom. Any activated electronic device (whether in use or not) interferes with the audio and video systems within the courtroom. Persons in violation of this requirement will be subject to removal from the courtroom and possible monetary sanctions.

4. The designated Media Representatives for the proceedings in this matter are \_\_\_\_\_ and \_\_\_\_\_. The Media Representatives will be responsible for media credentialing, for the equitable distribution of media seating for each session of the trial and other proceedings, and for insuring that both the Detroit and out-of-town media are guaranteed a certain minimum number of seats at each session of the trial and other proceedings.

5. The Clerk is hereby ordered to post the following court papers in this case in the "Latest News" section of the Court's web site ([www.mied.uscourts.gov](http://www.mied.uscourts.gov)):

Dkt. #1            Complaint

Dkt. #3            Order (list all court papers out)

The court papers shall be posted in chronological order in .pdf format.

(signature block, date, etc)

The Media Information Guide contains:

1. Purpose and Basic Tenets
2. General Policies
3. Media Representatives
4. Definition of “Credentialed Media” and Credential Requests
5. Reserved Seating for the Media
6. Electronic Equipment
7. Case Documents / Court papers
8. Courthouse Security
9. No Interviews with Judge
10. Frequently Asked Questions
11. Contact Information

1. **Purpose and Basic Tenets**

The purpose of this media plan is to provide a working structure to avoid and resolve news coverage problems, and to provide an atmosphere of open communication between the Court and the media. The plan includes guidelines for media coverage for courtroom proceedings in the matter of the United States v. Colton Harris-Moore.

**The goals of this media plan are:**

To maintain an appropriate and dignified atmosphere in the courthouse so that all litigants obtain an orderly hearing, preserving due process and equal protection.

To ensure that the Court adequately accommodates the news media and general public during proceedings of great public interest.

**Basic tenets of the plan:**

The media has a right of access to our justice system.

Other court proceedings must not be adversely impacted by proceedings of great public interest.

2. **General Policies**

There are a number of policies which govern the conduct of members of the media while in the Judge’s courtroom:

No food or drink is allowed in the courtroom.

All electronic devices (cell phones, pages, BlackBerries, iPhones, iPads, laptop computers, etc.) must be **TURNED OFF** *i.e.*, not just silenced, but deactivated. Any person in the gallery with an activated electronic device will be subject to removal from the courtroom and possible monetary sanctions.

No pictures, video recording or audio recording of the courtroom proceedings will be permitted. Use of any such device will subject the user to removal from the courtroom and possible monetary sanctions.

Once admitted to the courtroom, members of the media must remain until the Court’s regularly-scheduled recess. Exceptions will be made for emergencies (medical or otherwise) brought to the Court’s attention during the course of the proceedings.

3. **Media Representatives**

The Court approves the following individuals as Media Representatives:

(list out who your Judge has approved, one newspaper person and one TV person)

Concerns from the print media should be directed to \_\_\_\_\_ (newspaper rep). Concerns from television and radio media should be directed to \_\_\_\_\_ (TV rep).

4. **Definition of “Credentialed” Media and Credential Requests**

There is no federal definition of the term “media,” therefore, the Court will adopt the definition provided by state law.

Pursuant to RCW 5.68.010(5), the term “media” means:

(a) Any newspaper, magazine or other periodical, book publisher, news agency, wire service, radio or television station or network, cable or satellite station or network, or audio or audiovisual production company, or any entity that is in the regular business of news gathering and disseminating news or information to the public by any means, including, but not limited to, print, broadcast, photographic, mechanical, internet, or electronic distribution;

(b) Any person who is or has been an employee, agent, or independent contractor of any entity listed in (a) of this subsection, who is or has been engaged in bona fide news gathering for such entity, and who obtained or prepared the news or information that is sought while serving in that capacity; or

(c) Any parent, subsidiary, or affiliate of the entities listed in (a) or (b) of this subsection to the extent that the subpoena or other compulsory process seeks news or information described in subsection (1) of this section.

All requests for media credentials should be submitted to any of the Media Representatives listed above on the letterhead of the requesting person or organization.

5. **Reserved Seating for the Media**

There will be \_\_ seats available to the media for the hearing. The \_\_ seats reserved for the media will include any sketch artists. Of the \_\_ seats reserved, \_\_\_\_ seats shall be designated for local print media (list them here) and \_\_\_\_ seats shall be designated for local news stations (list them here).

**NOTE:** Once seated, all spectators, **including members of the media**, must remain in the courtroom until a regularly-scheduled recess. Exceptions will be made for emergencies (medical or otherwise) which are brought to the Court’s attention during the course of the proceedings.

6. **Electronic Equipment**

All electronic equipment (including, but not limited to laptop computers, cell phones, BlackBerries, radios and pagers) must be turned off or deactivated while inside the courtroom. Any activated electronic devices (whether in use or not) interfere with the audio and video systems in the courtroom.

Persons in violation of this requirement will be subject to removal from the courtroom and possible monetary sanctions.

7. **Case Documents / Court papers**

All documents and court papers contained in the docket in this matter may be accessed using the computer terminals in the Clerk’s Office on the first floor of the courthouse or through PACER, which may be accessed at <http://pacer.gov>.

8. **Courthouse Security**

All persons entering the courthouse must pass through electronic security screening devices. All persons are subject to search. In the case of members of the media, their equipment is likewise subject to search by the Court Security Officers. There will be no cameras allowed into the courthouse.

All members of the media are required to clear security screening upon **each** entry into the courthouse.

ALL PERSONS SEEKING ENTRANCE TO THE COURTHOUSE MUST PRESENT VALID GOVERNMENT-ISSUED IDENTIFICATION.

Weapons and liquids are not permitted inside the courthouse.

9. **No Interviews with Judge**

The Judge handling the case will not be providing any interviews or statements, nor responding to any inquiries. Please do not contact the Judge's staff to speak with him/her. The only public statements will be made from the bench while the proceedings are in session.

10. **Frequently Asked Questions**

**Is there a telephone number or email to contact about questions concerning the case?**

Public information about the case will be available on the Court's website or through PACER.

**How do I make sure I get a seat?**

There will be \_\_ seats available to the media for the hearing. The \_\_ seats reserved for the media will include any sketch artists. Of the \_\_ seats reserved, \_\_ seats shall be designated for local print media (list here) and \_\_ seats shall be designated for local news stations (list here).

**Can I bring my cell phone into the courtroom?**

Yes. However, all portable electronic devices (including, but not limited to laptop computers, cell phones, BlackBerries, etc.) must be **TURNED OFF** so that there are no electronic signals being broadcasted in or out of the courtroom. Signals from electronic devices are known to cause interference with the courtroom speakers and technology.

**Will I be able to come in and out of the courtroom during the proceedings?**

No. Seating will take place prior to the hearing start time. Once you are seated in the courtroom, you will not be able to leave the courtroom until the court recesses. In addition, once court is in session, you will **NOT** be allowed to enter the courtroom.

**Do I need identification to enter the courthouse?**

Yes. You need a government-issued form of identification to enter the courthouse (e.g., driver's license, passport, etc.).

**Can I bring food or drinks into the courthouse?**

No. Food and drinks are not allowed in the public areas of the courthouse or in the courtrooms.

**Can I use a video camera or use my phone to record video or take pictures during the proceedings?**

No. You may not use your video camera, cell phone, or any other recording device to record video or to take pictures during the proceedings. Judicial Conference policy prohibits electronic recordings in ALL federal courtrooms.

11. **Contact Information**

(insert Case Manager's info here)

If you need to contact the Court while in session, please contact:

(insert Judicial Assistant's info here)

The Public Information Guide contains:

1. General Courtroom Policies
2. Reserved Seating in the Courtroom
3. Courthouse Security
4. Case Documents / Court papers
5. Frequently Asked Questions
6. Contact Information

1. **General Courtroom Policies**

There are a number of policies which govern the conduct of members of the public while in the Judge's courtroom:

No food or drink is allowed in the courtroom.

All electronic devices (cell phones, pagers, BlackBerries, iPhones, iPads, laptop computers, etc.) must be **TURNED OFF** *i.e.*, not just silenced, but deactivated. Any person in the gallery with an activated electronic device will be subject to removal from the courtroom and possible monetary sanctions.

No pictures, video recording or audio recording of the courtroom proceedings will be permitted. Use of any such device will subject the user to removal from the courtroom and possible monetary sanctions.

Once admitted to the courtroom, members of the public must remain until the Court's regularly-scheduled recess. Exceptions will be made for emergencies (medical or otherwise) brought to the Court's attention during the course of the proceedings.

2. **Reserved Seating in the Courtroom**

Unless otherwise reserved by the Court, there will be approximately \_\_\_ seats available to the public for the hearing. The seats will be available on a first come, first served basis.

3. **Courthouse Security**

All persons entering the courthouse must pass through electronic security screening devices. All persons are subject to search.

All members of the public are required to clear security screening upon **each** entry into the courthouse.

ALL PERSONS SEEKING ENTRANCE TO THE COURTHOUSE MUST PRESENT VALID GOVERNMENT-ISSUED IDENTIFICATION.

Weapons and liquids are not permitted inside the courthouse.

4. **Case Documents / Court papers**

All documents and court papers contained in the docket in this matter may be accessed using the computer terminals in the Clerk's Office on the fifth floor of the courthouse or through PACER, which may be accessed at <http://pacer.gov>.

5. **Frequently Asked Questions**

**Is there a telephone number or email to contact about questions concerning the case?**

Public information about the case will be available on the Court's website or through PACER, which may be accessed at <http://pacer.gov>.

**How do I get a seat in the courtroom for the hearing?**

Unless otherwise reserved by the Court, there will be approximately \_\_ seats available to the public for the hearing. The seats are first come, first served. **NOTE:** Once seated, all spectators must remain in the courtroom until a regularly-scheduled recess. Exceptions will be made for emergencies (medical or otherwise) which are brought to the Court’s attention during the course of the proceedings.

**Can I bring my cell phone into the courtroom?**

Yes. However, all portable electronic devices (including, but not limited to laptop computers, cell phones, BlackBerries, etc.) must be **TURNED OFF** so that there are no electronic signals being broadcasted in or out of the courtroom. Signals from electronic devices are known to cause interference with the courtroom speakers and technology.

**Will I be able to come in and out of the courtroom during the proceedings?**

No. Seating will take place prior to the hearing start time. Once you are seated in the courtroom, you will not be able to leave the courtroom until the court breaks for a recess. In addition, once court is in session, you will **NOT** be allowed to enter the courtroom.

**Do I need identification to enter the courthouse?**

Yes. You need a government-issued form of identification to enter the courthouse (e.g., driver’s license, passport, etc.).

**Can I bring food or drinks into the courthouse?**

No. Food and drinks are not allowed in the public areas of the courthouse or in the courtrooms.

**Can I use a video camera or use my phone to record video or take pictures during the proceedings?**

No. You may not use your video camera, cell phone, or any other recording device to record video or to take pictures during the proceedings. Judicial Conference policy prohibits electronic recordings in ALL federal courtrooms.

6. **Contact Information**

(insert Case Manager contact info here)

If you need to contact the Court while in session, please contact:

(insert Judicial Assistant contact info here)



## The Honorable Ricardo S. Martinez – Wired for Justice? Smart Phones and Smart Jurors



General overview of examples of personal electronics in the Courtroom.

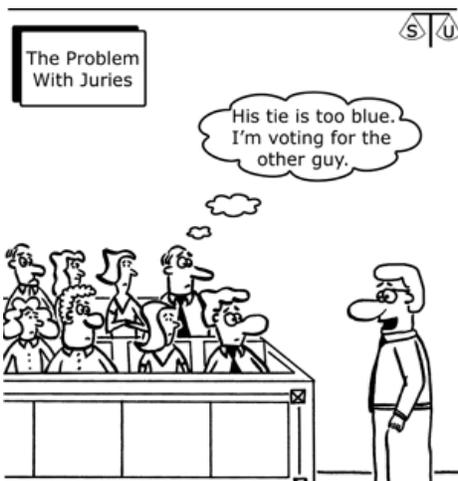
Discussion of problem areas where jurors may do personal research both during trial and on personal time.

Discussion of states (e.g. CA) where there are statutes on the books criminalizing the use of personal technology to interfere with the trial and also for research beyond what is presented in the courtroom.

Federal law does not address the personal technology issues.

Judge Martinez mentioned that the first incident of Internet and juror issues came up in 2001. He indicated that we have to be much more specific when talking to the jury; telling them to stay away from the web won't work. We need to change the *voir dire* exam and the jury instructions. In revising the instructions, we have to mention the specific technology by name, i.e., smartphones, internet, tablets, etc., and educate them on evidence and why it is critical that the only evidence they get on a particular case is what comes from the trial testimony. They have to understand that we are not trying to hide information, but working towards ultimate fairness to all parties. We need to decide on rules to use and this is the best way to get there. Violations can result in serious consequences. During *voir dire*, ask the jury if they can abstain from using any Internet connections. Use more pointed questions.

However, if it happens, does outside research bias jurors? Not necessarily. We can't stop them from getting on the web; we can't sequester them. An idea to combat this problem is how about asking attorneys to conduct web research and then address it to the jury. Jurors want to know everything about a case in order to make the right decision, so maybe we can help them in this regard.





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## **Deputy US Marshals Craig Nelson and Raymond Fleck – Judicial Security**

Discussion on identifying threats vs. inappropriate communications; what to do in each situation.  
Discussion on sovereign citizen filings, what to look for, what to do when receiving correspondence from them.

Don't wear or carry court emblem clothing!

Marshal Nelson said that the JAs are the Marshals' link to the judges. We are the eyes and ears of chambers. We can spot a threat or inappropriate communication before it reaches the judge. What is an inappropriate communication (IC)? This is not as obvious as a direct threat. What to look for: could be verbal, or in writing. (See next page) Forward all threats to the USMS. Occasionally you will come across the sovereign citizen ideology. Be sure to tell the USMS about it. They may sign with UCC on the bottom. If you get repeated calls from the same person, find out if your courthouse has the ability to block certain calls into the building.

There's a new campaign program in Seattle: "see it, say it, plan it, practice it." If you see something suspicious, report it. Know where the shelter area in your courthouse is in case of lock down. Know the evacuation routes and rally location. Don't wait to be saved. Practice with all staff especially when law clerks change.

You should regularly check the web to see what is being said about your judge. Check out [Spokeo.com](http://Spokeo.com) every other month as what you deleted could come back; check out [reputation.com](http://reputation.com) and [fonefinder.com](http://fonefinder.com). Also set up Google Alerts on your judge's name and all variations of it.

The following page has some information contained in the Power Point slides from the presentation.

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### Threats

Allows USMS to investigate to determine if there has been an Inappropriate Communication

Threats can be DIRECT or INDIRECT

Threats can be written, telephonic, verbal, relayed through a third party or seen in suspicious activity.

Example: "I am gonna kill you."

### Inappropriate Communications

A classification that allows the USMS to conduct a full investigation.

Involves several defined characteristics

Not all ICs are categorized as threats.

Can be written, telephonic, verbal, relayed through a third party or seen in suspicious activity.

Example: "There aren't enough Marshals to save you" or "I love sitting in your courtroom all day."

Although all direct and explicit threats are inappropriate, not all inappropriate communications are threats, but please report the following:

#### Communication containing any of the below references:

- Any **threats** i.e. "You'll get yours" or "You better ... or I will..."
- An **extraordinary complaint** or **outrage** over the handling of a case.
- **Pseudo-legal** court filings.
- References to a **special history** or **destiny** shared with you.
- Evidence of **stalking** behavior, or research of your personal affairs.
- **Religious** or **historical** themes involving you
- References to **death, suicide, weapons, violence, assassinations, acts of terrorism or war.**
- Expressions of extreme or obsessive **admiration** or **affection.**
- Obsessive desire to **contact** you.
- Belief that **debt is owed** the person by you.
- Perception of you as someone **other than yourself.**
- References to **public figures** that have been attacked.
- References to individuals (or their acts) who have **attacked public figures** or committed **notorious acts.**
- References or claims of **mental illness.**
- References to **body guards, security, safety, danger, etc.**
- Bizarre or unreasonable **solicitations.**



## **Betsy Post-Garza, Lexis Representative**

Reviewed new features about LexisNexis

Personal Lookup – Startling fact: The personal look up displays the first 5 digits of an individual’s SSN.

Betsy reported that at [www.lexis.com](http://www.lexis.com), Judicial Assistants may have their own password and log in set up at no extra cost. Lexis is compatible with an iPad, if you use one. Once in Lexis, you can add/edit the subtab section to select what you want to see.

You can also go to the Public Records section to see if your judge is on there. You may also check to see if you are on there.

Betsy also indicated that you can get a Judicial Assistant Certificate of Mastery. It takes two or three days but you can break the sessions up. For fleshing out this summary, I contacted Betsy who emailed me the following info about this certificate:

“We do 1-2 hours of instruction followed by a hands-on exercise after each block of instruction. On day one, we spend several hours on the fundamentals of law. It is about the branches of government, where laws are published (in case reporters, etc.), how to understand legal citation formats, etc. The second module focuses on getting documents on LexisNexis and how to conduct searches. The third module is about Shepard's and CheckCite. The fourth module is about news and reference sources. I do an optional fifth module that covers "other" sources. “

Please contact:

Betsy Post-Garza, Esq.

[betsy.post-garza@lexisnexis.com](mailto:betsy.post-garza@lexisnexis.com)

Direct: 760-576-6407

The following five pages will instruct you how to set up alerts for your judge. The two pages after that are ‘At A Glance,’ reference materials that will guide you to whatever you need done. The four pages following ‘At A Glance’ relate to Shepardizing cases.



# Alerts on LexisNexis for Judicial Assistants

Alerts provide you with automatic notification when your judge is mentioned in a newspaper article.

To run an Alert on your judge in the news, follow these steps

1. Sign on to LexisNexis through [www.lexis.com](http://www.lexis.com)
2. If you have never signed onto lexis.com before, your screen should look something like this:

The screenshot shows the LexisNexis website interface. At the top, there is a navigation bar with the Lexis logo, a search bar, and several dropdown menus: 'My Lexis', 'Search', 'Get a Document', 'Shepard's', and 'More'. Below the navigation bar, there is a 'Sources' section on the left, a 'Quick Tools' section on the right, and a 'Search by Topic or Headnote' section. The 'Sources' section is expanded to show a list of categories. The 'News & Business' category is circled in red. The 'Quick Tools' section includes a search bar and buttons for 'Get a Doc', 'Shepardize', 'Find a Source', and 'Lexis@Web'. The 'Search by Topic or Headnote' section includes a dropdown menu and a 'Go' button. The 'Litigation and Transactional Resources' section lists various legal resources.

3. Click **News**

4. The fourth source will be **Mega News, Most Recent 90 Days (English, Full Text)**. Click on this link.

The screenshot shows the Lexis search interface. At the top, there are navigation tabs: "My Lexis™", "Search", "Get a Document", "Shepard's®", and "More". Below this is a "Sources" section with a "News" sub-section. Under "News", there are two columns of links. The link "Mega News, Most Recent 90 Days (English, Full Text)" is circled in red. To the right of the "Sources" section, there are "Quick Tools" and "Award-Winning Solutions" sections. The "Quick Tools" section includes a search bar and buttons for "Get a Doc", "Shepardize®", "Find a Source", and "Lexis®Web". The "Award-Winning Solutions" section lists "LexisNexis® Dossier Suite", "SmartIndexing Technology", and "LexisNexis® Corporate Affiliations".

You will then get the following search screen:

The screenshot shows the Lexis search screen. At the top, there are navigation tabs: "All", "Add/Edit Subtabs", and "News & Business > Combined Sources > Mega News, Most Recent 90 Days (English, Full Text)". Below this is a "Search" section with a "View Tutorial | Help" link. The "Search" section includes a "Select Search Type and Enter Search Terms" section with a dropdown menu for "Terms & Connectors", "Natural Language", and "Easy Search™". To the right of the dropdown menu is a "Search" button and a "Suggest terms for my search" link. Below the dropdown menu is a "Check spelling" link. The "Restrict by Document Segment" section includes a "Select a Segment" dropdown menu and an "Add" button. Below this is a "Note: Segment availability differs between sources. Segments may not be applied consistently across sources." The "Restrict by Date" section includes a "No Date Restrictions" dropdown menu and "From" and "To" input fields. Below this is a "Search Connectors" section with a table of connectors and their meanings. The "How Do I...?" section includes links for "Combine sources?", "Restrict by date?", "Restrict by document segment?", "Use wildcards as placeholders for one or more characters in a search term?", and "View Tutorials".

Search Connectors	How Do I...?
and	Combine sources?
and	Restrict by date?
or	Restrict by document segment?
w/N	Use wildcards as placeholders for one or more characters in a search term?
pre/N	View Tutorials
More Connectors & Commands...	

5. Type your judge's name in using terms and connectors. For example, if your judge's name is John Doe, you should type in the following:

**hon! or judge w/10 John w/3 Doe**

I put 10 words between hon! or judge and the judge's name in case multiple judges are listed in the news article. The article may say something like: "Judges Joe T. Smith and Joe Q. Doe both attended the event."

The screenshot shows a search interface with the following elements:

- Select Search Type and Enter Search Terms**: A heading for the search configuration section.
- Search Type Selection**: Three buttons are visible: **Terms & Connectors** (selected), **Natural Language**, and **Easy Search™**.
- Search Terms Input**: A text box containing the search query: "hon! or judge w/10 marsha w/3 pechman".
- Search Button**: A blue button labeled **Search**.
- Check spelling**: A link to check the spelling of the search terms.
- Restrict by Document Segment**: A heading for a section below the search terms.
- Restriction Instructions**: Text below the heading that reads: "Select a document segment, enter search terms for the segment, then click Add."

6. Click the **Search** button.

7. You will retrieve a list of articles with your judge's name in them. Toward the top, you will see a link that says **Save As Alert**. Click the Save As Alert link.

FOCUS™ Terms hon! or judge w/10 marsha /3 pechman Search Within Original Results (1 - 34)  Advanced

View     **Save As Alert**

Source: **News & Business > Combined Sources > Mega News, Most Recent 90 Days (English, Full Text)**

Terms: **hon! or judge w/10 marsha /3 pechman** (Suggest Terms for My Search)

Duplicate Options

1. **US Official News**, September 26, 2011, 268042511, 431 words, Washington: Former Microsoft Manager Sentenced to Prison for Embezzlement Scheme.  
**CORE TERMS:** CURRY, prosecutor, scheme, third party, supervised, sentencing, discovered, sentenced, purchased, download, employer, careful, fraud  
 ... internal investigation of his criminal conduct. At sentencing today Chief U.S. District **Judge Marsha J. Pechman** noted that the public has grown incre. outraged over those who lie to line their own ...
2. **Detroit Free Press (Michigan)**, September 25, 2011 Sunday, FRONT PAGE; Pg. A1, 3013 words, SUICIDE OR the PERFECT MURDER?, By, JOE SWICKARD  
**CORE TERMS:** Widlak, Anne, Dave, Marchese, Macomb, Grosse Pointe, FREE PRESS, Central Bank, Edsel Ford, Lott, Bagno, Ford, marriage, mystery, smart, Caribbean, Dingell, Clemens, Jesuit, Clair, Stroh, Booth, Lake, troubled, colonial, divorced, wake-up, New Jersey, New York  
 ... reward authorized by whistle-blower laws. He "did not plan or initiate the scheme," **Judge Marsha Pechman** wrote, but neither did Marchese "swiftly a expose it. Marchese said he ...
3. **States News Service**, September 23, 2011 Friday, 475 words, FORMER MICROSOFT MANAGER SENTENCED TO PRISON FOR EMBEZZLEMENT SCHEME USED U THIRD PARTY VENDOR TO STEAL MORE THAN 400K, States News Service, SEATTLE, WA  
**CORE TERMS:** CURRY, third party, prosecutor, scheme, United States, Attorney's Office, Langlie, Emily, supervised, sentencing, discovered, sentenced, pu download, employer, careful, fraud  
 ... internal investigation of his criminal conduct. At sentencing today Chief U.S. District **Judge Marsha J. Pechman** noted that the public has grown incre. outraged over those who lie to line their own ...
4. **States News Service**, September 23, 2011 Friday, 473 words, FORMER MICROSOFT MANAGER SENTENCED TO PRISON FOR EMBEZZLEMENT SCHEME, State Service, SEATTLE, Wash.

8. On the Save as Alert page, it is recommended that you change the **Frequency** to Business Days and that you ask to be notified by e-mail when a news article with your judge's name is published:

**NOTE:** If you create an alert for a search for which you've set **Duplicate Options = On**, that option will not apply to future alert results.

**Save LexisNexis® Alert** Help

**Name:** Judge Pechman in the news

**Source:** Mega News, Most Recent 90 Days (English, Full Text) - MEGANW;90DMGA

**Terms:** hon! or judge w/10 marsha w/3 pechman

**Frequency:**   time at  ET\*

**Delivery:**  Online only  \*\*Email Email Options

Ex: johndoe@yourcompany.com

Alert me if there are no new results

Do not include duplicate documents

**Notification:** If you want to be notified via email when your search retrieves new results, check this box and enter your email address in the space provided.

\*\*Email  Notification Options

Ex: johndoe@yourcompany.com

\*Eastern Time

\*\*Email Distribution is subject to Terms and Conditions

9. Once you fill in your request, click on the Save button and you will get a confirmation screen. Make sure that you have entered your e-mail address in correctly at this time and click on save.
10. Your search will run Monday through Friday and when your judge's name is published in a news article, you will be notified by e-mail. When you click on the link in your e-mail, you will be directed to the LexisNexis sign in page. Once you sign in, you will be directed to the article. You can then print that article or e-mail it directly to your judge.
11. If you want to edit or delete your Alerts, click the **Alerts** link at the top right of any lexis.com page

The screenshot shows the Lexis website interface. At the top right, there are links for 'Switch Client | Preferences | Help | LiveSupport | Sign Out'. Below this is a navigation bar with 'My Lexis™', 'Search', 'Get a Document', 'Shepard's®', and 'More'. On the far right of this bar, 'History' and 'Alerts' are visible, with 'Alerts' circled in red. The main content area is divided into several sections: 'Sources' (with sub-sections for Legal, News & Business, and Public Records), 'Recently Used Sources' (showing 'Mega News, Most Recent 90 Days'), 'Quick Tools' (with a search input field and buttons for 'Get a Doc', 'Shepardize®', 'Find a Source', and 'Lexis®/Web'), and 'Search by Topic or Headnote' (with a dropdown menu and a 'Go' button).

Edit/Delete Alerts page:

The screenshot shows the Lexis Alerts management page. At the top, there are links for 'Switch Client | Preferences | Live Support | Help | Sign Out'. Below this is a navigation bar with 'My Lexis™', 'Search', 'Get a Document', 'Shepard's®', and 'More'. On the far right of this bar, 'History' and 'Alerts' are visible. The main content area is titled 'Alerts' and has a sub-section for 'Alerts' with links for 'Continuous Alerts', 'Shepard's® Alerts', 'New Docket Alerts', and 'Track Existing Docket'. Below this is a table of alerts with the following columns: Name, Client ID, Retrieve, Last Viewed, Last Updated, Delivery, and Actions. The table contains one alert: 'Judge Pechman in the News'.

Name	Client ID	Retrieve	Last Viewed	Last Updated	Delivery	Actions
Judge Pechman in the News		New   By Date   FOCUS	09/29/2011	09/29/2011	B Daily Online Only	Edit   Delete   Update Now

# lexis.com® At-A-Glance for U.S. Courts

## Sign In

1. Go to [www.lexis.com/uscourts](http://www.lexis.com/uscourts)
2. Enter your LexisNexis ID and password in the Sign In box. (The first time you sign in, you will be prompted to change your password).
3. Click **Sign In**
4. To access [lexis.com](http://lexis.com), click the **lexis.com** tab at the top.

For a lost or forgotten ID, call 800.59COURT (26878)

## Selecting Sources

Get the results you want by selecting specific sources from the unparalleled collection of resources.

### Surface Practice Area or Jurisdictional Content You Need Most by Customizing Your Tabs

Add up to 18 search subtabs to your main [lexis.com](http://lexis.com) page. Move to practice area/jurisdictional content or tasks in one step.

1. Click **+Add/Edit Subtabs**.
2. Select up to 18 options; Click **Next**.
3. You can change tab order and/or set a default starting tab. Click **Set**.

### Your Recently Used Sources **(A)**

Your last 20 selected sources are saved. Select from the drop-down menu. To retain or delete sources, click **Edit Sources**.

### Find a Source by Subject or Source Name **(B)**

Enter a full or partial source name, e.g., *wall street journal*, or subject, e.g., *oil spill*, in the Quick Tools search box and click **Find a Source**. Results are listed by relevance. (Another way to access Find a Source is the **Search** tab drop-down menu.)

### Search by Topic or Headnote

Just choose a legal topic and compile relevant materials—cases, briefs, treatises, news, etc., or build a digest of cases on the fly.

1. Select **Search by Topic or Headnote** under the **Search** tab.
2. Choose your topic. Select a practice area and browse the table of contents. Or enter search words describing your topic, e.g., *trademark significance*.
3. Follow the screen instruction for selecting sources or retrieving headnotes.

### Practice Area/Jurisdictional Sources

Special [lexis.com](http://lexis.com) practice area or jurisdiction pages highlight relevant jurisdictional and practice-area content and tools. Select the **Legal** tab under **Search** and choose a practice area or jurisdiction. Or select [view more sources](#).

### Additional Resources (More Tab)

Related products and services are available at the **More** tab. For example, find links to:

- LexisNexis® Analyzer
- Counsel Selector
- LexisNexis® Total Litigator
- LexisNexis® Verdict & Settlement Analyzer
- and others

## Frequent Research Tasks

Access many of your regular research tasks from the main [lexis.com](http://lexis.com) screen.

The screenshot displays the LexisNexis search interface with several key sections:

- Recently Used Sources (A):** A dropdown menu showing "News, Most Recent 90..." and a "Go" button. Below it is an "Edit Sources" link.
- Quick Tools:** A search box with the placeholder "Enter a citation or term". Below the search box are four buttons: "Get a Doc" (C), "Shepardize" (D), "Find a Source" (B), and "LexisWeb" (E).
- Quick Search (F):** A search box with "New York" selected and "Select Multiple" next to it. Below it is another search box with "Copyright Law" selected and "Select Multiple" next to it. Underneath is a "Source Categories" list with checkboxes: "Law Reviews & Journals" (checked), "Briefs, Motions, Pleadings & Verdicts" (unchecked), "Jury Instructions" (unchecked), "News & Business" (unchecked), and "Cases" (checked). At the bottom left of this section is "\*Entry Required" and at the bottom right is a "Next" button.

Note: Actual screens may vary due to frequent enhancements and product additions.

### Get a Document **(C)**

**By Cite**—full text of a case, statute, law review and more.

1. Enter the citation, e.g., *800 f2d 111*, in the Quick Tools search box.
2. Click **Get a Doc**.

**By Party Name**—full text of a case, docket, brief and more.

1. Click the drop-down menu at the **Get a Document** tab (next to **Search**).
2. Select **By Party Name**.
3. Enter party name(s).
4. Select a jurisdiction, court and/or source.
5. Click **Search**.

### Retrieve Multiple Documents (Get & Print)

Retrieve full-text documents by cite (cases, statutes, regulations, *Shepard's*® reports, etc.) and print all at once.

1. Click the drop-down menu at the **Get a Document** tab (next to **Search**) or the **Shepard's** tab.
2. Click **Get & Print**.
3. Sign in, if prompted.
4. Complete required fields in Get & Print box, e.g., enter cites.
5. Click **Get**.

### Shepardize® **(D)**

Verify cases, statutes, regulations, patents and more.

1. Enter the citation, e.g., *800 f2d 111*, in the Quick Tools search box.
2. Click **Shepardize**.

The *Shepard's* Summary condenses your report and shows why your case or statute received its *Shepard's* Signal™ indicator, e.g., *Caution*. (Another way to access *Shepard's* is by selecting the *Shepard's* tab.)

### Search Web Sources (Lexis® Web) **(E)**

Lexis Web is a legal-specific search engine offering free Web content from legal websites validated by LexisNexis attorney editors.

1. Enter your search words, e.g., *original work of authorship*, in the Quick Tools search box.
2. Click **Lexis Web**.

Find recommended documents from [lexis.com](http://lexis.com) as well as from the Web. Use the left navigation bar to filter results by topic, practice area, source, etc.

### Quick Search **(F)**

Select jurisdictions, practice areas and source categories and Lexis Quick Search compiles a list of relevant sources.

1. Select a jurisdiction then a practice area from the search boxes in Quick Search.
2. Choose source categories, e.g., *cases, forms*, etc., and click **Next**.
3. Enter your search words.
4. Select your sources from the compiled list.
5. Click **Search**.

## View Search Results

**Cite:** Bibliographic references. For cases, includes *Shepard's* Signal indicators, LexisNexis Core Terms and Overview to quickly preview results.

**KWIC™:** Key words in context. You can specify 1 to 999 words on either side of search terms.

**Full:** Full text of document.

**Custom:** Select the document segments you wish to review.



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**Case Law at lexis.com**

**Each Case Search Compiles the Appellate Chain and More Relevant Content**

Now lexis.com case-law searches—federal and state—automatically uncover vital insights. All retrieved documents are organized into one navigation pane to the left of your full-text case. Results may include:

- Official report **PDFs**
- **Prior and subsequent** cases
- **Briefs**, motions & pleadings
- **Dockets**
- Jury **verdicts**
- Trial **transcripts**
- Jury **instructions**

Plus, link to relevant analysis from this exclusive combination:

- **Matthew Bender®** treatises plus U.S. and state practice guides
- **ALR®**, **Am Jur®** and state jurisprudences such as Witkin
- Law reviews

**Search Tip:** A new window opens each time you link to a new document. To return to your navigation pane, minimize document screens.

**LexisNexis Case Law Enhancements**

**LexisNexis® Case Summaries** present a concise Procedural Posture, Overview and Outcome section written by attorneys—a LexisNexis exclusive.

**LexisNexis® Core Terms** are descriptive, computer-generated key words drawn directly from the text of case.

**LexisNexis® Headnotes** are the case's key legal points selected by LexisNexis attorney-editors and drawn directly from the language of a case. Headnotes are mapped to LexisNexis legal topics taxonomy.

**Search Tip: Find More Like This Headnote**

Find an on-point LexisNexis headnote and move to other cases with headnotes containing similar language, as well as closely matching opinion language. Just click the **More Like This Headnote** link at the end of the LexisNexis headnote.

**Pricing Information**

Depending on your subscription, some sources may be provided at a separate charge. If you see a dollar sign (\$) next to a source name, click the **\$** for separate pricing information. Or click the  icon next to any source link and scroll to the bottom of the pop-up page.

**Get Search Updates**

**(LexisNexis® Alerts)** 

Get automatic research updates; view via e-mail or online.

1. Review your search results.
2. Click the **Save as Alert** link. (You can save a search with 0 results for future updates.)
3. Fill in the **Save LexisNexis Alert** form.
4. Click **Save**.

To **manage** your alerts, click the **Alerts** icon.

**Research History** 

Re-run a search from a previous session or resume interrupted research. Click the **History** icon. The **Recent Results** tab shows searches and results from the last 24 hours. The **Archived Activity** tab shows activity without results from an additional 29 days.

**Narrow Your Search Results (FOCUS™ feature)**

The FOCUS feature:

- Narrows your results by adding terms and searching some or all documents from your original results
- Delivers a subset of results while retaining original search and results
- Highlights your added search terms in results for easy viewing

To use:

1. View search results.
2. Type additional terms in **FOCUS** terms box at top of page (using terms and connectors).
3. Click **Go**.

To return to original results, click **Exit FOCUS**.

**Print/Deliver Search Results**

**Print** 

Print one or more documents with custom formatting:

1. Click the **Print** icon (see above) and use the print form to print one or more documents and customize delivery format.
2. Print multiple documents at one time. Click the open checkbox beside each document you want to print, then click the **Print** icon and complete the print form.

For a printer-friendly view, click the printer-friendly format icon. 

**Download** 

1. Click the **Download** icon (see above) as you view your search results. Complete the download form.
2. Click **Download** again.

**E-mail** 

1. Once you have viewed your search results, click the **E-mail** icon (see above). Complete the e-mail form. (You can send to up to three addresses.)
2. Click **Send**.

**Fax** 

1. Once you have viewed your search results, click the **Fax** icon (see above). Complete the fax form. (You can send to up to three addresses.)
2. Click **Send**.

**Constructing a Search with Terms and Connectors**

- A **term or word** is any series of letters or numbers with a space on either side (e.g., *contract* or *\$1,234*).
- **Singular, possessive and plural** forms are automatically found (if word ends with s, 's, es, ies).
- **Some common equivalents are found** (e.g., *cal* finds *Calif.* and *California*).
- A **hyphen** is read as a space; a hyphenated word is read as two words.
- A **space** is read as a space.
- Use the @ symbol for the section symbol used in citations (e.g., *Section 305* = @ 305 or @305).
- **Exclamation Point:** Replaces any number of letters after a word root. Use only one ! per word at the end (e.g., *litigat!* finds *litigation, litigate, litigator*).
- **Asterisk:** Replaces one letter. You can use more than one \* in a word, anywhere except as the first letter (e.g., *wom\*n* finds *woman* or *women*; *bank\*\*\** finds *banked* or *banking* but not *bankruptcy*).

**Connectors establish a logical connection among search terms, operating left to right in this order:**

CONNECTOR	EXAMPLE	EXPLANATION
<b>OR</b>	<i>doctor OR physician</i>	Finds documents containing any of the terms or phrases connected by OR.
<b>/n</b>	<i>market /5 share</i>	Finds two search words in same document within n words of each other (n = any number, 1 – 255).
<b>/s</b>	<i>circumstances /S mitigating</i>	Finds words in same sentence.
<b>/p</b>	<i>rule /P sanction</i>	Finds words in same paragraph.
<b>AND</b>	<i>bank! AND deregulat!</i>	Finds documents containing all terms or phrases connected by AND.

For more connector options, see the tips offered with the lexis.com Search Form.

For research support, call 800.59COURT (26878).

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## CheckCite®:

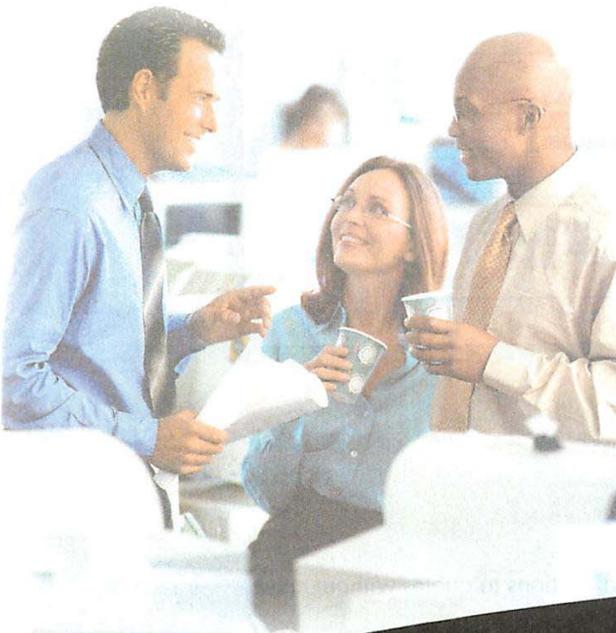
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Sorted A to Z on the end of the table

Case #	Citation	Shepard's®	Auto-Cite®	Quote Check	Full Text
1	200 U.S. 580, 581 (1902)	CA	CA	no quotes	not requested
2	146 U.S. 1, 24 (1902)	none	not requested	no quotes	not requested
3	118 U.S. 451, 456, 662 (1886)	CaseNot	not requested	See report	not requested
4	343 U.S. 214, 224 (1952)	CaseNot	not requested	no quotes	not requested
5	288 U.S. at 648	CaseNot	not requested	no quotes	not requested
6	103 U.S. at 422	not #1	not requested	no quotes	not requested
7	343 U.S. at 218	not #1	not requested	See report	not requested
8	1911 U.S. L2029 1821	CaseNot	not requested	no quotes	not requested
9	176 U.S. 445, 541 (1900)	CaseNot	not requested	no quotes	not requested
10	128 U.S. 141, 184 (1887)	WAZQZNG	not requested	no quotes	not requested
11	88 U.S. 130, 134, 24 (1874)	WAZQZNG	not requested	no quotes	not requested
12	423 U.S. 306 (1975)	CaseNot	not requested	See report	not requested
13	18 F. Cas. 477, 482-34	none	not requested	no quotes	not requested
14	193 U.S. 29, 28 (1904)	CaseNot	not requested	no quotes	not requested
15	146 U.S. at 24	not #2	not requested	no quotes	not requested
16	352 U.S. at 29	not #4	not requested	no	not requested

\*\*\*  
 Cit not requested as valid for app services on LexisNexis®  
 Cit not valid for that jurisdiction version on LexisNexis®  
 Differences found in citation information you entered. See report.  
 Multiple documents found for that citation, see full-text information to choose one.

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## To use *Shepard's CheckCite* to verify citations and quotes in the brief you are viewing:

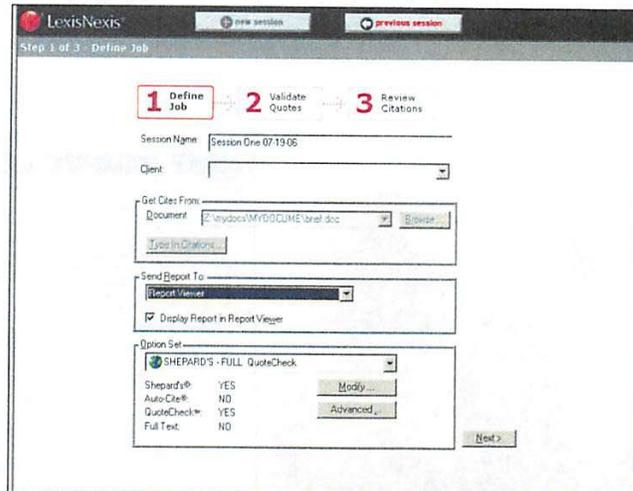
Click the **Shepard's CheckCite** button  in the *Shepard's Brief Suite* toolbar or from your desktop. *Shepard's CheckCite* will walk you through three simple screens to create your CheckCite report:

### 1 Define Job

At this screen, you will:

- Name your *CheckCite* session.
- Identify a client or matter (optional).
- Select a document to verify. (The path for the document you were viewing will display.)
- Select a delivery site for your *CheckCite* report (online report viewer, printer, word processor, fax, etc.).

Default checking options are selected. (See back for details on changing report options.) When you have finished defining your job, click **Next**.



### 2 Validate Quotes

The Validate Quotes screen gives you the opportunity to assign citations to quotes without cites.

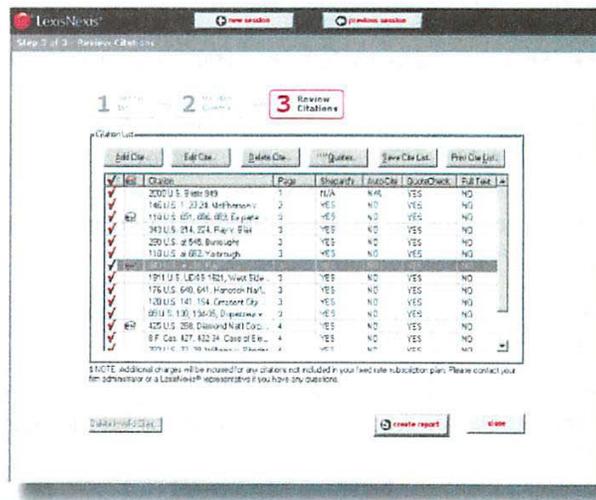
## 3 Review Citations

View your list of citations. You can:

- Add a cite (just click the **Add Cite** button and enter the cite).
- Delete a cite (highlight a cite; click **Delete Cite**).
- Edit a cite (highlight a cite; click **Edit Cite**).
- Delete invalid cites (click **Delete Invalid Cites**).
- Turn a service (e.g., Shepard's, QuoteCheck™, etc.) on/off for one or all citations (right-click on a **YES** or **NO**).

You can also save and/or print this cite list.

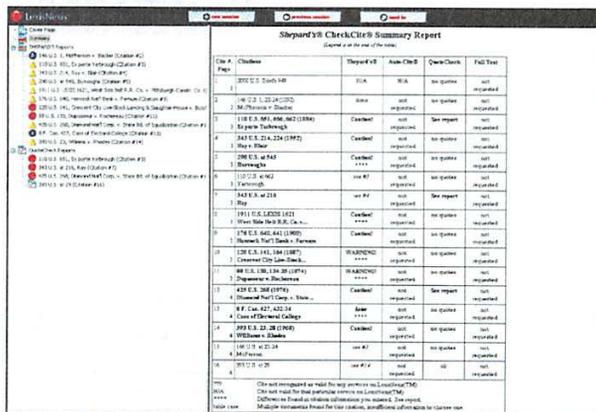
When you have finished reviewing cites, click **Create Report**.



## View Your Summary Report

Problem areas are in bold for fast review. Select **Expand All** from the **View** menu to display *Shepard's Signal*™ indicators as well as links to *Shepard's* reports and full-text documents.

Save your *Shepard's* CheckCite report if you wish to view it again. (Your session is automatically saved in Previous Sessions. Click **Previous Sessions** to view your list of sessions.)



## Editing CheckCite Report Options

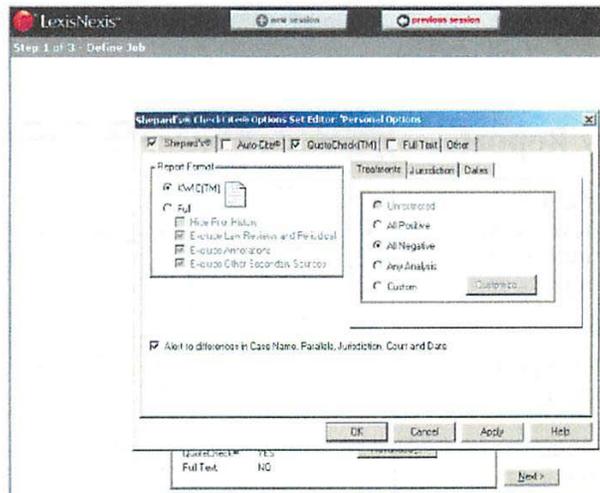
The **Define Job** screen gives you access to a variety of report options to customize your *Shepard's* CheckCite report. To change options for *Shepard's*, Auto-Cite, QuoteCheck and more, go to Option Set and click **Modify**.

Check the boxes on the options tab to include *Shepard's*, Auto-Cite, QuoteCheck and full-text document retrieval to your report. You can also select each tab and edit options. For example, select the options tab for:

- **Shepard's** (select a FULL or KWIC™ report and select specific editorial treatments, jurisdictions and/or dates)
- **Auto-Cite** (include or exclude specific history)
- **QuoteCheck** (request quotes in context, ask CheckCite to ignore short quotes and more)
- **Full Text** (include full-text documents in standard or dual-column layout)
- **Other** (This tab gives you additional formatting and content options, such as excluding duplicate cites.)

Check and uncheck specific options, moving from tab to tab. When you're finished selecting options, click **OK**.

You can save a new, changed option set to use again. Just click **Advanced** on the **Define Job** screen. Then click **New** in the Advanced Options Set Manager screen. Give your new option set a name and save.



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## The Honorable Phyllis Hamilton, 9th Circuit - Aging/Wellness in Chambers



History of the 9th Circuit's Aging/Wellness committee/program  
Launch of website and programs for judges and staff

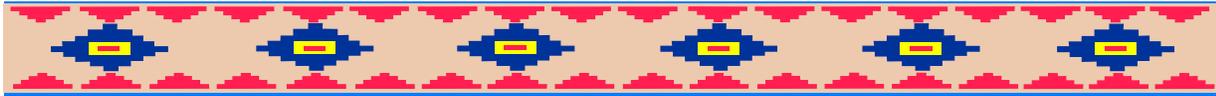
Judge Hamilton indicated that the Ninth Circuit has available a 24/7 hotline to give advice and counseling to those who log on. It is confidential and is available to all of the judges' staff for their own use. The web site is available through J-Net (see 9th Circuit wellness).

<http://wellness.circ9.dcn/>

They also have a quarterly newsletter called 'Courting Good Health.' You may also find this on their web site. In addition, they developed a wellness guide and also have an orientation program for the new judges. She asked if our circuit would benefit from such a program? Everyone agreed!

She has a software program on her computer, called RSI Guard, that makes you stretch, turn your head, and take short breaks. Once she started using it, she made everybody in her chambers use it! There's a free 45 day trial offer on RSI Guard. <http://www.rsiguard.com/download.php?ns=1>

Feel free to email her any suggestions on how JAs can help with the wellness program.



## David Decker, Director of IT, Seattle - Social Networking

Discussion on Spyware, how to clean and prevent future Spyware invasion (see next two pages).

Listing of websites to help: JASIRC, Snopes.com, Threat Explorer, IT Security Awareness Brochures

Tips on how to protect your computer:

Firewalls, secure wireless router, don't use administrator account for everyday use, back up machine to an external hard drive

Discussion on how to create a strong password

Discussion on different viruses, inappropriate posts, phishing scams

Review of Canons of the Codes of Conduct

Discussed social media sites and what makes them different

For your computer at home, set the updates to configure automatically

To lock your screen: hit the Windows logo button and L



From his power point presentation:

According to Consumer Reports, in 2010, eight million U.S. households had serious problems with spyware. 617,000 households had to replace slow or impaired PCs for a total cost of \$1.2 billion.

Phishing Attacks: According to Consumer Reports, in 2010, one million U.S. households lost money or had accounts misused as a result of phishing attacks. There were approximately 29,000 attacks in December of 2009. Many involved financial email scams. Total cost was \$650 million.

# SOCIAL NETWORKING AND COMPUTER SECURITY

## Quick Reference Guide



U.S. District Court  
Western District of Washington

<h3>What To Do If You Get Spyware</h3> <ul style="list-style-type: none"> <li>• Clean it - run a virus scan</li> <li>• Google it - you can find a solution this way, but be careful!</li> <li>• Reimage it - having a backup of your machine is a really good idea.</li> </ul>	<h3>Spyware Precautions</h3> <ul style="list-style-type: none"> <li>• Don't click on buttons in pop-ups.</li> <li>• Be careful of email links, even from people you know.</li> <li>• Be careful when you are warned that you may be infected – including Google</li> </ul>
<h3>For More Information</h3> <ul style="list-style-type: none"> <li>• <b>JASIRC Notifications</b> <a href="http://jnet.ao.dcn/Information_Technology/Computer_Security/Alerts/JASIRC_Notices.html">http://jnet.ao.dcn/Information_Technology/Computer_Security/Alerts/JASIRC_Notices.html</a></li> <li>• <b>Snopes.com</b> <a href="http://www.snopes.com/">http://www.snopes.com/</a></li> <li>• <b>Symantec's Threat Explorer</b> <a href="http://www.symantec.com/business/security_response/threatexplorer/risks/hoaxes.jsp">http://www.symantec.com/business/security_response/threatexplorer/risks/hoaxes.jsp</a></li> <li>• <b>IT Security Awareness Brochures</b> <a href="http://jnet.ao.dcn/Information_Technology/Computer_Security/IT_Security_Awareness_Brochures.html">http://jnet.ao.dcn/Information_Technology/Computer_Security/IT_Security_Awareness_Brochures.html</a></li> </ul>	<h3>Protecting Your Machine</h3> <ul style="list-style-type: none"> <li>• Use a Firewall</li> <li>• Secure Your Wireless Router</li> <li>• Keep Your Machine Up to Date</li> <li>• Don't Use Your Machine with an Administrator Account</li> <li>• Use Symantec Endpoint Protect – free to you as a court employee</li> <li>• Back up your machine to an external hard drive*</li> </ul> <p>*You can purchase an external hard drive with the ability to back up and restore your personal computer for approximately \$150.</p>
<p>SOCIAL MEDIA MARKETING MADNESS</p>	<h3>Creating a Strong Password</h3> <p>Here is an example of using the first letter of a phrase to create a strong password:</p> <ul style="list-style-type: none"> <li>• I Love to Work for the Court</li> <li>• I Love to Work for the Court</li> <li>• ILtWftC</li> <li>• IL2W4tC</li> </ul>
<h3>Definitions</h3> <p><b>GEOTAGGING</b> - is the process of adding geographical identification information to various media such as a photograph or video.</p> <p><b>PHISHING</b> - is a way of attempting to acquire sensitive information such as usernames, passwords and credit card details by masquerading as a trustworthy entity in an electronic communication.</p> <p><b>SOCIAL ENGINEERING</b> - is the art of manipulating people into performing actions or divulging confidential information, rather than by breaking in or using technical cracking techniques.</p> <p><b>SPYWARE</b> - is a type of malware that can be installed on computers, and which collects small pieces of information about users without their knowledge.</p> <p><b>TROJAN HORSE</b> - is a destructive program that masquerades as an application. The software initially appears to perform a desirable function for the user prior to installation and/or execution, but (perhaps in addition to the expected function) steals information or harms the system.</p> <p><b>VIRUS</b> - is a computer program that can copy itself and infect a computer. The term "virus" is also commonly but erroneously used to refer to other types of malware, including but not limited to adware and spyware programs that do not have the reproductive ability.</p> <p><b>WORM</b> - is a self-replicating malware computer program, which uses a computer network to send copies of itself to other nodes (computers on the network) and it may do so without any user intervention.</p>	

## Viruses (not really)

**AT&T virus:** Every three minutes it tells you what great service you are getting.  
**The MCI virus:** Every three minutes it reminds you that you're paying too much for the AT&T virus.  
**Elvis virus:** Your computer gets fat, slow, and lazy and then self destructs, only to resurface at shopping malls and service stations across rural America.  
**Oprah Winfrey virus:** Your 200MB hard drive suddenly shrinks to 80MB, and then slowly expands back to 200MB.  
**PBS virus:** Your PC stops every few minutes to ask for money.  
**Texas virus:** Makes sure that it's bigger than any other file.

## Canons of the Code of Conduct

**Canon 1:** A Judicial Employee Should Uphold the Integrity and Independence of the Judiciary and of the Judicial Employee's Office  
**Canon 2:** A Judicial Employee Should Avoid Impropriety and the Appearance of Impropriety in All Activities  
**Canon 3:** A Judicial Employee Should Adhere to Appropriate Standards in Performing the Duties of the Office  
**Canon 4:** In Engaging in Outside Activities, a Judicial Employee Should Avoid the Risk of Conflict with Official Duties, Should Avoid the Appearance of Impropriety, and Should Comply with Disclosure Requirements  
**Canon 5:** A Judicial Employee Should Refrain from Inappropriate Political Activity

## What is a Phishing Scam

- Email that tries to trick you into sending personal information
- Fake messages from a Facebook friend (if someone's account has been compromised)
- Fake antivirus software that asks you to buy protection – they really just want your account information
- Email links that ask you to log into your account (Facebook, Twitter, or your Bank).

## Securing Your Wireless Network

From SimpleHelp.net:

1. Download the latest firmware for your device.
2. Change the administrator password.
3. Change your SSID and turn off SSID Broadcasting
4. Enable WPA
5. Limit access by MAC addresses

For more information and links to the most common wireless networking hardware vendors sites:

<http://www.simplehelp.net/2006/07/06/how-to-secure-your-wireless-home-network/>

## Social Media Sites

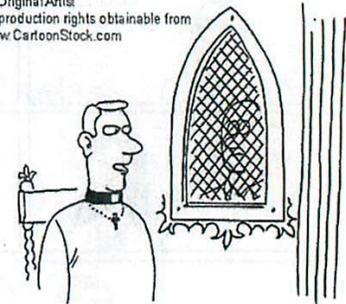
**Facebook** - a social media site typically used by family and friends.  
**Twitter** - a site for micro-blogging. Posts are restricted to 140 characters.  
**YouTube** - a site used for video sharing.  
**Linked in** - a social media site typically used for business networking.  
**Wikipedia** - an encyclopedia site that users can update and edit.  
**foursquare** - a social media site used for posting your location.  
**digg** - a social news web site.  
**flickr** - a site used for picture sharing.  
**Blogger** - a blog site.

### Joke:

**Question:** What did the general do when he learned via Twitter that the battle was going badly?

**Answer:** He retweeted!

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*"Don't you have anything more recent?  
I've already read what you just confessed  
on your blog."*

## Examples of Inappropriate Posts

### Posts Containing:

- Judge's Location or Activities
- Unprofessional Conduct
- Political Affiliation
- Inappropriate Pictures or Language

## What Makes Social Media Different?

- You provide the content
- Data is never truly erased or deleted
- You're not anonymous – you can be traced
- It's Collaborative

Additional info from Mr. Decker's power point presentation:

**SOCIAL ENGINEERING** - is the art of manipulating people into performing actions or divulging confidential information, rather than by breaking in or using technical cracking techniques.

**WORM** - is a self-replicating malware computer program, which uses a computer network to send copies of itself to other computers on the network) and it may do so without any user intervention.

**VIRUS** - is a computer program that can copy itself and infect a computer.

***Worms and Viruses are different, but not enough to matter to us that are infected. It must execute itself and it must replicate itself.***

**TROJAN HORSE** - is a destructive program that masquerades as an application. The software initially appears to perform a desirable function for the user prior to installation and/or execution, but (perhaps in addition to the expected function) steals information or harms the system.

**GEOTAGGING** - is the process of adding geographical identification information to various media such as a photograph or video.



## **Rosann Crawford, Chief Training Staff AO – Learning & Development of Chambers Staff**

Packing the four P's for learning opportunities: Plan, Prepare, Practice, Perform  
Launch of the Judiciary Learning Matrix in December 2011 ([http://jnet.ao.dcn/Training/Judiciary\\_Learning\\_Matrix.html](http://jnet.ao.dcn/Training/Judiciary_Learning_Matrix.html))

From her power point presentation:

You must be your own advocate. It's up to you to keep up your skills and learn new ones that will better help you and your judge.

Once you register and receive a login you will be able to enter the Matrix and go to 'A Learning Guide for Chambers Administration.' The Chambers Administration Matrix offers many learning and development options and it's tailored for you.

More information on the matrix:

What is it? It's a collection of resources linked to job functions specific to judicial assistants and judicial secretaries. The JSAG (Judge's Secretaries Advisory Group) has been working on it - for YOU.

Who is it for? It available for anyone.

When will it be available? It will be live by the end of the calendar year. Watch for a formal announcement. (active now)

Where can we find it? I'll show you in a minute. There will also be a link on the Chambers Staff Training room page.

If you accept the Matrix, it will lead you on journey to learning development opportunities. You will be able to plan many different journeys that will specifically meets your needs. The Matrix doesn't plan the journey. It provides the catalog of opportunities with descriptions of what you can expect to learn and how to "sign up" for the next part of your journey. What will you need to do once you've explored the Matrix?

**Plan** – select some learning activities. Be sure to ask permission before taking any training.

**Prepare** – by scheduling the activities.

**Practice** – what you learned.

**Perform** – perform and show off your new skills.



## Lou Gill, Director San Antonio Training Center – Doing More with More

How to get people to do what you want them to do.  
Discussion of effective communication.  
Understanding people's motivations for doing something.

How do you get people to do what you want them to? How do you get them to want to do it? How do you have to change to get them to want to do what you want them to? An even better question to ask and what we're going to primarily deal with here is: "How do I get myself to do the things that will connect with people so that they will want to do what I want and need them to do...?" We need to do more with less, so what we need is leadership, innovation, communication, and teamwork. We have to be leaders: principled individuals who believe something strongly, and are willing to stand up for our beliefs, and speak out.

You have to find your voice. You can only speak the truth when speaking in your own voice. Ask yourself what do you care about? Our values guide us. Ask yourself two questions: What did I do today to demonstrate a value to believe in? What did I do inadvertently that shows the opposite?

You have to challenge the process. If you expand the work to fit the staff, not all are working to their potential. The work of leaders is change...and all change requires that leaders actively seek ways to make things better. In the very near future, lots of courts are going to have to maintain productivity with a reduced staff and that's a significant change - same or increased amount of work, fewer people. We're going to have to change the way we do business. Well, who knows better how to run the business than those who run it now? Who has more opinions about how things could be better than those experiencing the situation the way it currently exists? US!!

Leaders seize initiative and encourage it in others. A sense of meaning and purpose gets a team through the tough times. Our purpose is service to the American public. You can't pay people enough to care. Innovation requires more listening and communication.

Good leaders want people to speak up, to offer suggestions for improvement and to be straightforward about their constructive criticism. They create an environment that allows their constituents to be ready and willing to seize the initiative without fear of making things worse. Providing a positive role model of someone who is successful at meeting new challenges fosters initiative. "I know we can do it..." rather than "I'm not sure we're going to make it, but..."

Three ways to become more influential:

Make them (people, co-workers) believe why they're important

Sometimes you need to appeal to emotion

Talk about and show the benefits. Wiifm: What's in it for me?

In order to get things done right the first time, you have to have a conversation, not just give directions or orders.

Three universal practices:

Positivity: communication elevates the spirit, is enabling. Become conscious of phrasing your communication with each other in positive terms

Choice: offering choices paves the way to change behavior, build in some element of choice even when it's hard to do

Reflection: ask the person reflective questions, reflective questions are non-coercive, realization of the effectiveness

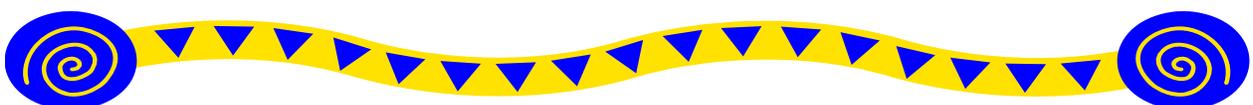
Doing more with more:

It all starts with leadership...more collaboration

An environment that encourages innovation...more efficiency

Open, honest, constructive, two-way interaction...more communication

A sense of community...of team...more productivity



## Debra Newman - JSAG and the AO

The JSAG (Judges' Secretaries Advisory Group) is:

An advisory group that provides advice, assistance and recommendations to the Administrative Office of the U.S. Courts regarding matters affecting judicial assistants.

The Director of the AO appoints one member from each circuit for a term of two years. The presidents of the FJAA and the ABA are also invited to observe JSAG meetings.

JSAG members meet telephonically on a monthly basis and also meet in person annually, as funding allows.

The JSAG is chaired by Michele Reed, Acting Chief, Article III Judges Division, Office of Judges Programs, Administrative Office of the U.S. Courts.

Joseph Phillips, Senior Attorney, Article III Judges Division, is the JSAG contact.

Visit the JSAG web page: JNet-Especially For...Judges-Chambers Staff-Judicial Assistants/Secretaries-Judges' Secretaries Advisory Group

[http://jnet.ao.dcn/Judges/Chambers\\_Staff/Assistants\\_Secretaries/JSAG.html](http://jnet.ao.dcn/Judges/Chambers_Staff/Assistants_Secretaries/JSAG.html)

Responsibilities are:

Provide the Director of the AO with advice on issues affecting judicial assistants and secretaries.

Serve as a liaison between judicial assistants within the circuit and the Administrative Office.

Communicate throughout the year with judicial assistants and secretaries in the circuit concerning policies and procedures that affect the position.

Recommend topics and materials to be addressed at the Chambers Staff Administrative Workshop and through other training avenues such as web-based training.

Facilitate breakout groups at the Chambers Staff Administrative Workshop.

Review policies and recommendations affecting judicial assistants.

What's new:

Chambers Learning Matrix was created by judicial assistants for judicial assistants. It's a one-stop shop for new and not so new judicial assistants to access training materials and is a living document to help you learn at your desk. It's also to assist with training new JAs in your District. Access is free.

[http://jnet.ao.dcn/Training/Judiciary\\_Learning\\_Matrix.html](http://jnet.ao.dcn/Training/Judiciary_Learning_Matrix.html)

# Stephanie Lawley, JA to Judge Burgess, District of Alaska – Temporary Duty Assignment

Four Pillars of Exchange Program:

1. Director's Leadership Program

Residents for discrete projects

Senior and mid-level court staff

1 year assignment in Washington, DC

Professional development opportunity

    Presidential National Security Assessment

    Bankruptcy Manual revision

    USPO Risk Assessment tool developed

2. Temporary Duty Assignment

Participants/Eligibility

Length of TDY Assignments

Subsistence & Expenses

Project examples

    CM/ECF Next Generation

    Strategic Plan for Federal Judiciary

    Software Development

3. Knowledge Exchange Program

AO Staff visit "host courts"

Shadow court personnel on-the-job

Facilitate collaboration between AO & Courts

See challenges firsthand courts face

    Ride-along with USPO

    Brown bag lunches with judges

    Probation & Pretrial Services

#### 4. AO Orientation

Orientation for AO Staff to judiciary

Courts, defender organizations & AO Staff

Judiciary policies & procedures

Appeals

Bankruptcy

Types of temporary duty assignments:

Relocation to Washington, DC

Teleworking

Combination of on-site & telework

Duration—6 months to 1 year assignments

Memorandum of Understanding (MOU)

Who is eligible:

With permission of Judge/Supervisor:

Judicial Assistants

Law Clerks

Subject Matter Experts

Clerk's Office Personnel

Federal Defender Agency Staff

US Probation Office Staff

Subsistence and Expenses:

Responsibility of AO Directorate

Annual Salary, Benefits & Locality Pay

Monthly stipend for housing expenses

Backfill of position for 1 year & 1 day

Where the opportunities are posted: <http://exchangeprograms.ao.dcn/coax/>



Agenda  
Board of Directors Meeting  
Seattle, Washington  
Thursday, October 6, 2011  
3:00 p.m.

- I. Introductions**
- II. Approval of Minutes from September 27, 2011 Board Meeting**
- III. Committee Reports**
  - A. Audit
  - B. Budget & Finance
    - 1. Treasurer's Report
  - C. Legislative
  - D. Long-Range Planning
  - E. Membership
  - F. By-Laws
  - G. Nominations & Elections
  - H. Ways & Means
  - I. Public Relations/Newsletter
  - J. Professional Development & Continuing Education
  - K. History & Archives
  - L. Annual Conference
- IV. Old Business**
  - A. By-laws changes
- V. New Business**
  - A. 2012 Conference
  - B. 2013 Conference