



## How can I set-up a series of dates on the calendar all-at-once based on a starting date such as a “date of loss” (DOL)?

Orion’s Practice Management Systems provides a robust Calendar/Docketing system that can be tailored to the firm’s exact needs. If you do not see the Events tab on your Contacts screen (bottom panel), you may not be granted security rights to see this part of the program or your firm has not implemented Orion Practice Management. Please contact your Firm Administrator or the Orion Support Desk for more information.

### Instructions

To set-up a “To Do” list, or series of dates on the calendar based on a start date such as a DOL date, you will need to use the Critical Date feature.

Click on the **Critical Dates** icon on your task bar and select the **Critical Dates Protocol** from the drop down.

**Note:** Critical Date protocol must be set-up in Orion Administration prior to use. This requires some knowledge of how Orion handles docketing. Orion can provide training for your firm to assist the person who will be responsible for setting up protocols as part of a Practice Management Implementation of Docketing.

*To schedule training, please contact the Orion Support Desk.*

Next, fill out the appropriate set-up information for the critical dates:

- Choose the Matter that the appointments/tasks will be associated with by keying the client matter number in the field or choosing it from the look-up (F8).
- Choose the **Assigned by** person
- Choose the **Default Assigned to** person
- If you need to add additional people, click on the **Assignments List**
- Choose a **Default Venue**
- Choose a **Start Date**
- Click on **Create Critical Dates**

(Continued on Next Page)



# Support Corner

February, 2014

22 Create Critical Dates

Select Protocol SB800

Setup Information

Matter

Assigned By CBS Smith, Charles B.

Default Assigned to CBS Smith, Charles B. Assignment List

Default Venue State of California

Start Date Mon, 11/11/2013

Create Critical Dates Cancel

The system will display the appointments/tasks that will be created to allow you to preview. You may choose to leave them the same or edit as needed.

**Note:** The “time” spacing between appointments/tasks is set-up by the original protocol for a reason, so edit them only if it is truly necessary. If a date is moved and it affects dependent events, you will be prompted to choose if you want the dependent events to move as well. The edit affects only these particular dates you are currently creating, not the default protocol itself.

If the dates are correct, click on **Save Critical Dates**, If you decide not to put them on the calendar, click on **Delete Critical Dates**.

22 Critical Dates Manager: SB800 COPY

Client 007136 - Gene Weaver Start Date

Matter 000001 - Estate Planning

Assigned	Client Name	Matter Code
[-] Smith, Charles B.	WEAVER, GENE	007136-000001
[+] Smith, Charl...	WEAVER, GENE	007136-000001
[-] Smith, Charl...	WEAVER, GENE	007136-000001

Further Questions? Have a Support Tip idea? Let us know, at [support@orionlaw.com](mailto:support@orionlaw.com)