

All Phases Contemporaneous Notes Toolkit

Requirement	Ensure timely and accurate recording and appropriate communication of conversations, activities, information, and advice provided on relevant and material issues during the conduct of the matter	
Steps	Make record	The responsible lawyer should record the file note at the time of, or as soon as practical after the communication by: <ul style="list-style-type: none"> • handwriting, dictating, or typing the file note at the time of or immediately following the communication • completing a standard file note template for handwritten notes; and • ensuring all relevant information is recorded including the file number, date, responsible lawyer attending, all parties communicating, and matters discussed (by who)
	Record detail	The responsible lawyer should record sufficient and accurate detail to clearly describe the material information concerning the communication being recorded: <ul style="list-style-type: none"> • Record all instructions received, information communicated, advice given, required follow up action and next steps proposed; and • Take records for all telephone conversations, client meetings, court hearings and any other event where communication of facts, allegations, advice, and information is provided that is not otherwise recorded
	Communicate information	The responsible lawyer should communicate relevant information recorded in the note to internal and external stakeholders: <ul style="list-style-type: none"> • Determine who a relevant stakeholder to the information is and what they need to know • Provide the note via: <ul style="list-style-type: none"> ○ email ○ soft copy email attachment ○ for hard copy file notes, scan and upload to the document storage system and send the scanned copy via email attachment
	Store note	The responsible lawyer must store the file note in a central repository containing matter file information ensuring hard copies are scanned and uploaded to the file along with email and soft copy notes

Sample Contemporaneous Notes template:

Matter			
Date		Start	Finish
Lawyer (s)			
Client (s)			

Other party (s)	
Purpose of discussion	
Meeting type	
Notes on discussion	
Actions	
Signed by lawyer	

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