



The Official Publication of the  
Montgomery County Paralegal Association

February 2018

**Inside this issue:**

PRESIDENT'S MESSAGE	1
THANK YOU SPONSORS	2
THE CHANGING ROLE OF LEGAL SUPPORT STAFF	3-5
CRIMINAL LAW & FORENSICS CONFERENCE	6
NEWS & ANNOUNCEMENTS	7
UPDATES TO MONTGOMERY COUNTY COURT FILING	8
SAVE THE DATES	11
2018 EDUCATION SUMMIT	14
OFFICERS	15
BOARD OF DIRECTORS	16
COMMITTEE CHAIRS CONTACT INFORMATION	17

**PRESIDENT'S MESSAGE** by Nancy Piechota, Pa. C.P.

*As I start my term as your new President, I want to take the opportunity to tell you a little about myself. I am originally from Milwaukee, Wisconsin and have lived in Pennsylvania for the past 10+ years. I have worked in the legal field for 39 years. I obtained my Associates Degree as a Legal Secretary and started working in my first law firm as an intern in 1979. In 1984 I obtained my Paralegal Certificate from the American Institute for Paralegal Studies. Prior to moving to Pennsylvania I worked for a total of 29 years at 2 different firms. When my husband and I moved to Pennsylvania I needed to find a job in a law firm. I was fortunate enough to only have my resume posted for less than 24 hours and received 2 calls for interviews. I returned to both places the day after my initial interview for a second interview and was offered a position at both places before I returned home from those interviews. I decided to accept the offer at my current firm and started 3 days later. While having experience in subrogation, insurance defense, worker's compensation, estate planning, estate administration, personal injury, real estate, corporate, collection, family law and criminal defense, I was starting at a firm that did Estate and Trust Litigation. We would be working in Orphans' Court and believe me I had no idea what that was. I first thought it was a Court that dealt with children who were orphaned but quickly learned that was not the case.*

*I knew that I was going to have to learn a totally new legal system from what I was used to in Wisconsin. But, I was ready for the challenge and I knew that I could do it. I am a firm believer in taking notes, making form books and most important, asking questions and not pretending I know everything because I knew I didn't. I was extremely fortunate to be working for an attorney who taught me everything I needed to know about Orphans' Court litigation. I recall through my years of schooling to remember that I needed to adapt to the way things were done at my new firm and not how I always did it.*

*After 10+ years at my firm, I can tell you that I am still learning new things and I take great pride in helping others that join the firm to learn how things are done and why they are done the way they are.*

*The reason I wanted to tell you this story was to show you that sometimes you may have to move to another firm or even another attorney in your firm in a field that you are not knowledgeable about. Remember that you can adapt if you really want to. Take the time to make notes, form books or folders on your computer and ask questions if you don't understand something. Always give it your best and know that you have done so will make learning a new area of law or working with a new firm or attorney a bit easier.*

*I want all the members to know that I am dedicated, hard working and I take great pride in what I do and you can be sure that I will do the same for you as your President.*

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MCPA Editing Team:

**Newsletter Committee:**

**Contributing Editor:**

Suzanne Sarver, RP  
Suzannehoffman32@yahoo.com

**Layout Editor:**

Michelle Calkins, Pa.C.P.  
Mcalkins@millerturetsky.com

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# THE CHANGING ROLE OF LEGAL SUPPORT STAFF

*By Cynthia Thomas*

Recent advancements in technology used by law firms have blurred the lines between legal assistants/paralegals and legal secretaries. What were once two separate and distinct positions now overlap, and both jobs have changed significantly.



Traditionally, the terms legal assistant and paralegal were used interchangeably, with both referring to a nonlawyer legal support staff member who, after education and training, performed substantive legal tasks. Legal assistants generally have an advanced understanding of the law and legal proceedings, and routinely perform tasks such as researching cases, preparing discovery, interviewing people involved in cases, preparing case summaries and general case management. These tasks are generally performed independently and are billed to the client. A legal secretary, on the other hand, performs clerical and administrative tasks under the supervision of an attorney or a paralegal. Historically, the legal secretary's tasks commonly include word processing, dictation, handling incoming and outgoing mail, court filings and answering an attorney's telephone. These tasks are not billed to the client. While serving very different functions and having distinct job requirements and responsibilities, legal assistants/paralegals and legal secretaries work very closely together and often rely on each other to play instrumental roles in providing support to attorneys and to the practice of law.

## **WHAT'S HAPPENING TO LEGAL SECRETARIES?**

Times are changing. Goodbye typewriter; hello laptops, smartphones and tablets. The increased use of these electronic devices in law firms allows attorneys to work independently anywhere, any time. These devices, along with voice recognition software, are just a few of the technological advancements that have vastly affected legal secretaries' duties. More attorneys type their own correspondence and use email rather than having a secretary type a letter and send it by U.S. mail. Younger tech-savvy associates need no encouragement to adopt the new technology and, as new generations enter the workplace, it will become the norm. A decrease in traditional clerical duties is also causing a major change in the role of legal secretaries.

Some law firms, wanting to cut costs and increase efficiency, are eliminating legal support staff positions, including secretaries. Those remaining secretaries, who once supported one or two attorneys, are now often supporting five or more, especially when assigned to younger lawyers. In addition, some law firms have retitled "legal secretaries" as "legal assistants," not only so they can bill certain tasks of the secretary (such as drafting correspondence or organizing documents) to clients, but also to entice a new generation of entry-level college-degree workers who view a secretarial job as temporary or transitional.

**CONTINUED**

# THE CHANGING ROLE OF LEGAL SUPPORT STAFF

By Cynthia Thomas

CONTINUED

## LEGAL ASSISTANTS/PARALEGALS?

Legal secretaries, however, are not the only legal support staff affected by computer technology. The role of the legal assistant/paralegal is changing as well. Legal assistants are now required to perform legal research—another activity that the firm can bill the client for doing. This requires that a legal assistant know precisely where to go for any necessary information. Twenty years ago, this would often require going into the law firm's law library and searching through books, spending countless (billable) hours reading and Shepardizing cases. Today most firms have discarded their books in favor of online services such as Westlaw and Lexis for legal research, not to mention the use of the Internet. This allows a legal assistant to perform the research in less than half the time, and with this faster technology the answer is often expected within minutes.



Another major change in the role of legal assistants involves the handling of discovery. Paralegals play a critical role in assisting attorneys with discovery. They help manage the discovery process, especially when large volumes of documents are involved. These documents are no longer housed in banker boxes with spreadsheets. Instead, through the use of computer technology, digital scanners and document management software, discovery documents are stored in electronic format. This use of document management software is another major technological change affecting legal support staff.

Therefore, the traditional role of a legal assistant has transformed into a more tech-savvy one, and paralegals are now training and working with IT personnel to assist in managing the discovery process. Thus, successful litigation legal assistants must now be familiar with document management software, and state and federal e-discovery rules, and they must be able to coordinate with outside litigation support vendors. As a result, the evolution of document management technology has created a new legal support staff member who merges the skills of a paralegal and a computer specialist into a legal technology specialist.

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# THE CHANGING ROLE OF LEGAL SUPPORT STAFF

By Cynthia Thomas

CONTINUED

## **LEGAL TECHNOLOGY SPECIALISTS**

A legal technology specialist provides technical support for large e-discovery projects, document production and document reviews.

This position did not exist 15 years ago. If a specialized database was needed, the firm's IT technician or department would assist a legal assistant in creating one. However, a legal technology specialist not only requires advanced knowledge of document management software programs and database manipulation, but also a thorough understanding of federal and state rules of civil procedure. Not to mention attention to detail, multitasking, analytical skills and great customer service skills. And let's not forget someone who works well with attorneys, legal assistants and legal secretaries.

## **MOVING FORWARD**

So what is the future role of legal secretaries and legal assistants? As technology continues to develop, legal and litigation support staff will continue to grow and remain to fill a vital function within law firms. For current legal secretaries and legal assistants to remain gainfully employed in the legal field today, they must first embrace technology as a survival tool and be willing to become proficient at the emerging software. Second, legal secretaries and legal assistants must adapt to change, demonstrate flexibility, be receptive to new projects and responsibilities, be willing to take on challenges to gain experience, and exhibit a desire for continuous learning and professional development. Third, to accommodate new technology and workflows, they will need to adjust their communications with lawyers so that more information can be shared regarding current projects and clients. Finally, they must be willing to work together and in teams.



Therefore, law firms need to begin to reclassify and create new job descriptions, duties and titles to better reflect the support staff's actual responsibilities. In addition, they must reorganize and restructure their organization to deliver the best client services. One possible new support structure is the development of client service teams. A client service team is based upon all members working collectively as a group. The team is comprised of partners, associates, paralegals and legal secretaries dedicated to performing the necessary tasks to provide quality services to clients and to ensure that the firm is running in a highly efficient and cost-effective manner. In a client service team concept, three roles dominate: (1) the client service coordinator, (2) the production coordinator, and (3) the production assistant. However, a team concept is only effective and successful if training programs assist all team members to retool and shift their thinking and approach to work in a more technologically advanced law firm world.

*Cynthia Thomas is the founder of PLMC & Associates, a management consulting firm for small and midsize law firms, and is a member of the editorial board of Law Practice magazine. She was also a firm administrator for law firms in Los Angeles and San Francisco.*

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## CONFERENCE AGENDA

8:00 - 8:30	Registration Coffee & Doughnuts
8:30 - 9:30	Nuts & Bolts of Interlock in Pennsylvania <i>Kathy Riley</i> , Judicial Services Liaison Smart Start
9:45 - 10:45	Legal Ethics: The Key to Professional Felicity <i>Arthur T. Donato</i> , Esquire Law Offices of Arthur Thomas Donato
11:00 - 12:00	Clandestine Labs: The Overlap of Hazmat and Crime Scenes <i>Rebecca C. Patrick</i> , Forensic Scientist 2 PA State Police, Bureau of Forensic Services
12:15 - 1:00	Lunch
1:00 - 2:00	Children as Witnesses: Challenges and Opportunities <i>Kathleen B. Stilling</i> , Esquire Buting, Williams & Stilling, Brookfield, Wisconsin
2:15 - 4:15	A Conversation on Justice [working title] <i>Jerome F. Buting</i> , Esquire Buting, Williams & Stilling, Brookfield, Wisconsin

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# NEWS & ANNOUNCEMENTS



## MCPA needs volunteers for:

- ⇒ taking photographs at Member Meetings and Events
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- ⇒ contributing career related articles for the newsletter, website and social media

*Please contact an officer or board member for more information!*

## ALL MEMBERS ARE INVITED

The MCPA By-Laws state that all members are invited to attend Board of Directors meetings. These meetings are usually held the first Tuesday of the month at 6:00 pm at the law firm of Mannion Prior, LLP. Mannion Prior, LLP is located in King of Prussia at 840 First Avenue Suite 100. Future meetings are scheduled to be held:

March 6th ▪ April 3rd ▪ May 1st  
June 5th ▪ September 4th  
October 2nd ▪ November 6th

Contact an officer or board member for more information!

## GOOD DEEDS

*The MCPA collected \$80.00 cash and also donated approximately 9 cases of diapers, 10 single packs of diapers, a box of coats and a bag of hats and gloves to Cradles to Crayons. Good job everyone! Please continue to support this charity.*

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## Updates to Montgomery County Court Filing Procedures:

New Statewide Public Access Policy goes into effect  
January 6, 2018 and Electronic Filing is coming to  
Criminal Court in Montgomery County  
in January 2018

By **Lydia S. Terrill, Esq. and Denise S. Vicario, Esq.**

*Changes are coming in 2018 to Montgomery County Court filings: a statewide public access policy will go into effect that will impact all case types and PACFiling that will be available on criminal cases. On January 6, 2017, the Pennsylvania Supreme Court adopted a new policy addressing access to trial and appellate court records throughout Pennsylvania. This policy will go into effect on January 6, 2018. It addresses who can access certain court records, and restricts certain types of information from being accessed at all.*

*There is a general presumption that most court records are open to the public, with several exceptions. Historically, the only way to access court records was to go to the Courthouse to access the files you wanted to see. However, because more and more counties are making dockets and docket entries available to the general public online, along with concerns about privacy and identity theft, there is a growing need to address what type of information is available to the general public.*

*This Public Access Policy addresses the accessibility of records by the public, including how to obtain records and the fees associated with these records. The policy delineates what information is available in the Court filing offices, online, or not at all. Additionally, the policy addresses what information the filing party needs to redact before filing a document that may be available to the public and what types of confidential documents cannot be made available to the public at all. Significantly, all filing parties must certify that they have complied with the provisions of the Public Access Policy, and may be sanctioned if they don't.*

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## **Updates to Montgomery County Court Filing Procedures:**

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By **Lydia S. Terrill, Esq. and Denise S. Vicario, Esq.**

### **CONTINUED**

On documents that contain Social Security numbers, bank account numbers, driver's license numbers, children's names and birthdates, and information about abuse victims, a redacted and an unredacted version will now need to be filed, so that a viewing party only sees the redacted version. Other counties may opt to implement a different procedure, which will involve filing a Confidential Information Form along with a redacted pleading. The Confidential Information Form would be submitted along with the filing.

Confidential documents (tax returns and schedules, W-2s, 1099s, wages stubs, earning statements, bank and credit card statements, check registers, loan applications, medical and psychological records, Office of Children & Youth records, educational records, marital property inventories, pretrial statements, and agreements between the parties) will now be filed as "confidential documents" which means that they will be accompanied by a Confidential Document form, to be filed along with the document.

So, what does this mean for Montgomery County practitioners? The Court has enacted local rules of Judicial Administration, Civil Procedure, Criminal Procedure, and Orphans' Court to implement the Public Access Policy and require the filing of a redacted and unredacted version of documents with confidential information. As aforementioned, certification of compliance is required, and all filers will be required to complete and file a Certificate of Compliance as a separate page at the end of every filing. Also, filers are encouraged to omit confidential information and confidential documents not essential to the matters to be decided to minimize the need for redaction, and where possible, to file documents that contain no confidential information.

Additionally, on the Court filing front, PACFile (Pennsylvania Court's Electronic Filing System) is coming to the Criminal Division in Montgomery County in late January 2018! PACFile allows attorneys (and agencies) to submit filings on a case at any time and from anywhere – essentially – electronic case access on the go. PACFile has been available for Montgomery County Juvenile & Dependency cases since February 2017. PACFile is accessed on the Unified Judicial System (UJS) Portal website, and is the same system used by the Pennsylvania Appellate Courts.

So, what does PACFile mean for Criminal, Dependency, and Juvenile Court practitioners? It means offices will have the ability to file Motions, Petitions, Entries of Appearance, etc. electronically, and PACFile-registered users will have the ability to view cases and electronic documents. Also, notifications are sent to PACFile-registered participants when any document is filed on the case. This will be a wonderful feature for any law office, and the Court is looking forward to this enhanced service to Montgomery County practitioners.

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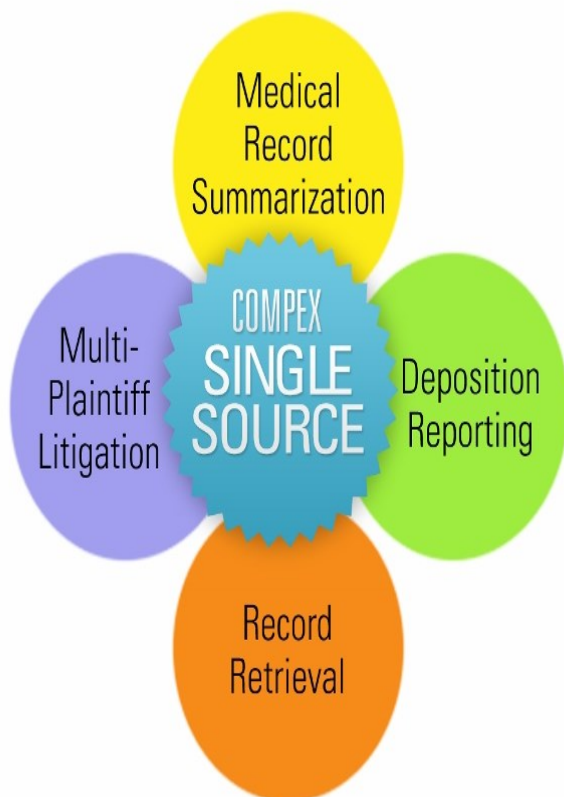
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## NEW & IMPROVED MCPA WEBSITE!

By Shari Weber Bradley

# EXCITING NEWS!

**T**he MCPA IS excited to announce its new website! This Fall we performed a complete overhaul with the help of Tina Marie Hilton at [Clerical Advantage](#) and [Girly Girl Geek Designs](#) Website Design. Please check out our new look at [www.montcoparalegals.org](http://www.montcoparalegals.org)!

The most interesting announcement is that we now have online applications for both new members and renewing members! You can click on Benefits of Membership from the menu or the Membership button at the top of the page to view our online applications. An option to printout a .pdf of your application or to submit online.

Also added is the option to pay online! Tina worked with Emily Campbell, a Certified Payments Professional with AffiniPay to create the online payment option! Fast, easy and convenient.

You can now find out sponsor applications and online payment, making life easier for those who support our programs. Check out the *Our Sponsors* menu option and our newsletters for a list of our sponsors.

We have a legal links page with valuable resources. And don't forget to check out our news blog.

Check back often because we will be adding pictures and notes about our activities so you always know what's going on.

If you have any ideas on ways to improve our site, please contact the webmaster, Shari at [sweber@bortlaw.com](mailto:sweber@bortlaw.com).



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*Nancy is a Paralegal at the law firm of Mannion Prior, LLP in King of Prussia. Nancy also sits on the Board of Directors and also serves as Chair of the Marketing Committee. She lives in Berks County with her husband, Joe and rescue dogs.*

***Kelly Lightcap, Pa.C.P. —Vice President***

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*Kelly is a Paralegal at the law firm of Kane, Pugh, Knoell, Troy & Kramer in its Norristown office. She currently serves as the Association Treasurer, a position she has held since 2013. She is also the Job Bank Coordinator for the MCPA. She lives in Phoenixville with her husband and cat, Emmett J.*

***Christopher Gregg—Treasurer***

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*Chris works for the law firm, Kane, Pugh, Knoell, Troy & Kramer as a Paralegal. He has been an active board member for the past 3 years and serves as its Social Media Committee Chair. Chris was born and raised in Willow Grove and still resides there with his family and their dachshund Queenie.*

***Jen Kuemmerle, CRP, Pa.C.P.—Secretary***

Luther Woods Nursing & Rehabilitation Center  
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jkuemmerle@lutherwoods.org

*Jen is the Vice President of Finance at The Luther Woods Nursing & Rehabilitation located in Hatboro. She has served on the Association's Board of Directors and was recently elected to serve as its Secretary. She lives in Hatboro with her husband and two children.*

## BOARD OF DIRECTORS



**Christopher Gregg**  
(2017—2019)

Chris works for the law firm, Kane, Pugh, Knoell, Troy & Kramer as a Paralegal. He has been an active board member for the past 3 years and serves as its Social Media Committee Chair. Chris was born and raised in Willow Grove and still resides there with his family and their dachshund Queenie.



**Shari Weber Bradley, Pa. C.P.**  
(2016—2018)

Shari works for Peter E. Bort, Esquire at Bort Law which is a general practice firm. A long time member of MCPA, she currently serves as the Webmaster. Shari lives in Eagleville and is the mother of two twenty something boys and stepmother of three teen boys.



**Noreen Messmer, Pa. C.P.**  
(2017—2019)

Noreen is a Paralegal with the law firm of Ford & Buckman, P.C. in Blue Bell and has worked with Sarah Ford, Esquire for over 40 years. She has been a Board member since 2010 and also serves on the Hospitality/Planning Committee. Noreen lives in Blue Bell and is the mother of three and Nana to three granddaughters.



**Nancy A. Marchese, Pa. C.P.**  
(2018—2020)

Nancy is a Paralegal with Miller, Turetsky, Rule & McLennan. She serves as the Committee Chair of Hospitality & Events Planning Committee. She assists in the areas of Family Law, Collections, Civil Litigation, Bankruptcy, Criminal Defense and Personal Injury at the law firm of .



**Michelle Calkins, Pa. C.P.**  
(2017—2019)

Michelle is a Paralegal with Miller, Turetsky, Rule & McLennan located in Collegeville. She is an active member of the Association and currently serves as the Layout Editor of the MCPA newsletter. She lives live in Collegeville with her husband, Wes.



**Dana Jorna, Pa. C.P.**  
(2018—2020)

Dana has been an active member since 2013. Dana assists in the areas of Civil Defense Litigation, Medical Malpractice, Legal Malpractice and Personal Injury defense at the Kane Pugh Knoell Troy & Kramer, LLP law firm since 2013.



**Nancy Piechota, Pa. C.P.**  
(2016—2018)

Nancy is a Paralegal at the law firm of Mannion Prior, LLP in King of Prussia. Nancy was recently elected to the Board of Directors and also serves as Chair of the Marketing Committee. She lives in Berks County with her husband, Joe and rescue dogs.

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<b>MARKETING</b>	Nancy Piechota, Pa.C.P. <a href="mailto:npiechota@mannionprior.com">npiechota@mannionprior.com</a>
<b>MEMBERSHIP</b>	Tracey L. Barnes, RP, Pa.C.P. <a href="mailto:TBarnes@dischellbartle.com">TBarnes@dischellbartle.com</a>
<b>NEWSLETTER</b>	Suzanne Hoffman Sarver, RP—Contributing Editor <a href="mailto:suzannehoffman32@yahoo.com">suzannehoffman32@yahoo.com</a>  Michelle Calkins, Pa. C.P.—Layout Editor <a href="mailto:mcalkins@millerturetsky.com">mcalkins@millerturetsky.com</a>
<b>STUDENT AFFAIRS &amp; MENTORING</b>	Lisa LaPenna, Pa.C.P. <a href="mailto:llapenna@kaplaw.com">llapenna@kaplaw.com</a>
<b>NFPA DELEGATES</b>	Primary: Debbie Arbuckle, Pa.C.P. <a href="mailto:Darbuckle@kaplaw.com">Darbuckle@kaplaw.com</a>  Secondary: Debbie Long, Pa. C.P. <a href="mailto:deblong420@gmail.com">deblong420@gmail.com</a>
<b>PUBLIC RELATIONS</b>	Jen Kuemmerle, Pa. C.P. <a href="mailto:jkuemmerle@lutherwoods.org">jkuemmerle@lutherwoods.org</a>
<b>SOCIAL MEDIA</b>	Christopher Gregg <a href="mailto:cgregg@kanepugh.com">cgregg@kanepugh.com</a>
<b>STUDENT LIAISONS</b>	<b>Peirce College:</b> Annette M. Long-Tulio, CRP, Pa.C.P. <a href="mailto:amlong83@gmail.com">amlong83@gmail.com</a>
<b>WEBMASTER</b>	Shari Weber Bradley, Pa. C.P. <a href="mailto:sweber@bortlaw.com">sweber@bortlaw.com</a>