New Case Checklist

GETTING STARTED

"Where do I start?" is a question you may find yourself asking when you are first setting up a new case in Nextpoint. The following Case Checklist outlines a suggested route to help you get organized on the front-end and make sure you are taking full advantage of what Nextpoint has to offer.

	ESI Technology Plan
	Discuss Technology Plan & Potential Costs for Case • Contact your internal Nextpoint Administrator to discuss ESI plan for case & potential costs • If Administrator is not yet certified in Nextpoint and/or has eDiscovery planning experience, contact your Nextpoint Account Director to discuss a plan for your case.
	Open new project & database via your Account Dashboard • Case Name with Client/Matter Number
	Users & Access Levels
	Data Collection • Build a repeatable collections plan for similar case types (e.g. employment cases) • Discuss if you will need IT Assistance at collection site? Remote collections? • Data Source (Identify Custodians/Parties, Type, Estimated Size) • Collection Format (pst, mbox, loose natives, etc…) • Do you need to consider engaging a forensic collections expert for your case?

Analytics/ Data Strategies
- Review ESI Protocol and Production Specifications
- Discuss needs and benefits of early data analytics, creating search term reports of potentially responsive documents prior to import, near-dupe analysis, etc.
- Confirm timeline and cost-benefit versus standard import with post-import data analysis

Import Settings
- Deduplication
- DeNIST
- Attachment Index

IMPORT

Data Types
- Native Email (eml, msg, pst, mbox)
- Loose Natives (doc, xl, ppt, etc…)
- Produced/Processed data (single page tiff/jpg, document level text files, natives, metadata load file)

Determine how you will process Documents
- Larger data sets, produced data, or documents for which you would like to maintain the folder structure, utilize the Nextpoint File Room
- Drag & Drop or Add File from Computer

Custom Fields
- If importing data produced *to* you, consider any necessary load file modifications. Load file fields not already included in your Nextpoint database will need to be set-up as Freeform Custom Fields prior to import.
    - Load Files & Advanced Data Imports

Import Documents

STRUCTURE

General Settings
- Grid View Column Templates
- Key Term Highlights

Folder Settings
- How will you organize your review with Folders?
  - *Folder per custodian? Replicate folder structure you have stored locally? Assign particular users to specific review folders?*

Coding Settings
- Custom Confidentiality Settings
- Custom Fields (*Attorney Notes, Hot Doc, Privilege Description, etc..*)
- Hot Fields, Privilege Reasons, Redaction Reasons, Responsive Issues

Training for Users
- Nextpoint offers free 30 minute training webinars every Wednesday @ 12:00 pm CT; Sign up for our weekly Nextpoint 101 training

PRODUCTION

Production Set-up
- Privilege Log? (Create Export Template and corresponding Load File Template)
- Confidentiality coding
- Endorsement Template: Bates Prefix, number of digits, and start number
- Natives (Which file types should receive a Native Placeholder and be produced in their native format?)

Production Format
- Concordance/Summation
- PDF or Single Page tiff/jpg with Image Load File?
- Metadata Required

Quality Control Checklist
- Check for Privilege
- Redactions
- Parent/Attachments together
- Load File Totals = Image Totals
- Stamping
- Confidentiality AEO
- Attorney Sign-off

	Delivery Method
	- Nextpoint Shared Export
	- Thumb Drive/CD/DVD
	- Large File Transfer
	    ○ Recipient email addresses
	    ○ Verify Sender (Who should the file be coming from?)
	    ○ External Instructions for Delivery
	    ○ Language for body of email

	CASE PREP
	Exchange Produced Documents to Litigation - Nextpoint Exchange - Once documents have been reviewed for relevance, confirm that bates-stamped produced data can be exchanged to a Litigation database - Develop review plan for issue coding documents being produced by Opposing Parties (Discovery or Litigation?) - Discuss deposition workflow option to exhibit stamp documents prior to deposition - Understand how exhibits will be presented and used in depositions, hearings or trial