

# CaseTrack Legal Hold Management

CaseTrack's Legal Hold Module helps reduce the risk of legal sanctions resulting from a failure to preserve information relevant to pending or threatened litigation. Specifically, it provides the ability to record that a legal hold has been issued, maintain a list of data custodians, generate automated notifications and subsequent reminders, and maintain a history of notifications and acknowledgements

**Hold Order**

matter name: Connors, Mary P. v. XYZ Corp. 1998-02239 [Done]

hold start: 08/02/2009 [Cancel]

hold end: [Report]

notify months: 3

next notify: 11/02/2009

hold description: All documents pertaining to former employee Mary Connors.

notification e-mail text: Immediately suspend deletion, overriding, or any other destruction of electronic records relevant to the above legal hold that are under your control. This includes electronic records wherever stored, including, but not limited to,

file name: \\georgia\cdrive\LegalholdPolicyandProcedures.doc [Launch]

Person Name	Title	E-mail Address	Inactive
Blankenship, Eric V	President	eblankenship@eaglt.com	No
Jenny Storm	Corporate Records	jstorm@eaglt.com	No
Maren, Bill	IT Manager	bmaren@eaglt.com	No

Person Name	Notice Sent By	Notice Sent	Acknowledged
Blankenship, Eric V	Lee, Jennifer	08/25/2009	08/27/2009
Healy, Bert	Lee, Jennifer	08/25/2009	
Jenny Storm	Foscoe, Kenneth	08/25/2009	

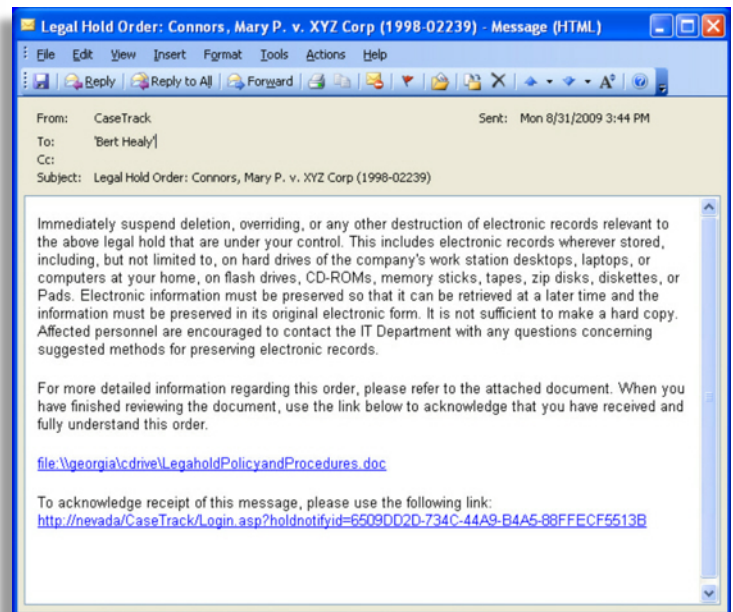
When a matter becomes subject to a legal hold, CaseTrack includes a Hold Order form which allows the user to record the details of the order including the start date, a description of the hold and a list of stake holders requiring notification.

Once the hold has been recorded, automatic e-mail notification, including detailed instructions regarding the hold, can be sent to the specified individuals. The e-mail notification may include a link to a web site or a file attachment, allowing you to provide direct access to formal policy documents and other hold order procedural content.

To ensure that each custodian acknowledges that they have received, understood, and will comply with the order, the e-mail notification includes a link which, when selected, will generate an automated acknowledgement from the custodian.

Following initial notification that a hold order has been issued, you can send periodic reminders at specified intervals to ensure on-going compliance with the order.

CaseTrack includes built-in reports to help manage and track hold orders issued by the legal department. With these reports you can review a list of hold orders using a variety of criteria as well as maintain a history of hold order notifications and acknowledgements.



## CaseTrack Hold Order Features:

- Customizable data entry form for hold order details
- Master list of data custodians
- Automated e-mail notifications and reminders
- Complete audit trail of notifications and acknowledgements
- Built-in hold order management reporting



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