## Auto Update Can Lead to Auto Malpractice

Templates are a great way to create accurate, consistent, and professional forms. On the efficiency scale, they rate an A+. So how is it that such a great tool can lead to legal malpractice?

In Microsoft Word, one culprit is "Update Automatically." The corollary in Corel WordPerfect is "Keep the inserted date current." Both settings are associated with date and time fields and should be avoided like the plague in most circumstances. Here's the problem:

Let's say you want to create a letterhead template in Word. You enter the firm information, add the logo, and decide to insert a date field. In the Header & Footer toolbar, you select the Date & Time button, and click OK.
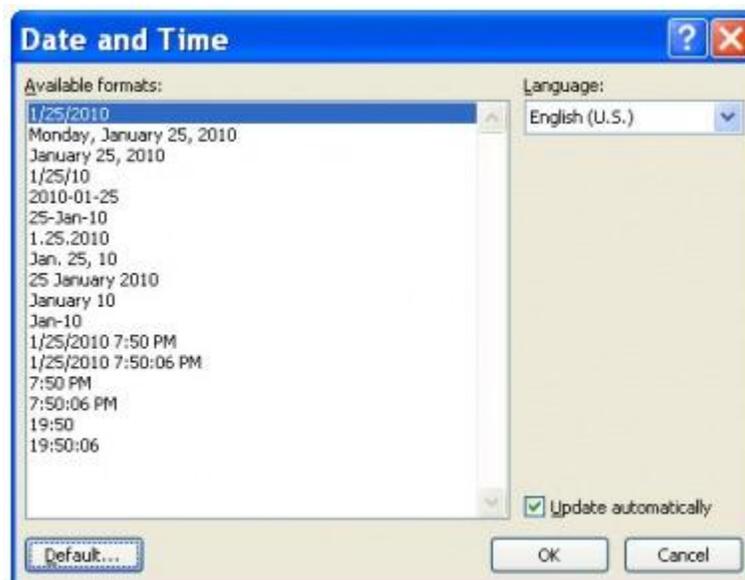
You think, "This is great. I'll never have to worry about adding a date to my letters when I use this template."

Very true. But are you getting the result you intended? Probably not, and that's where the potential malpractice comes in.

Take another look at the screen shot. See the little box, "Update automatically?" In Word, it's checked by default. This box means what it says. Every time you open or resave a document based on this template, the date of your document will change. The result? Your electronic client file is no longer accurate.

What if you could prevent users from opening or resaving documents? Pretty unlikely. Even if it were possible, your documents may be at risk from automated processes. For example, some firms run PDF conversion programs overnight. The conversion works by opening the document in it's native application, then printing to PDF. If the process runs after midnight, the act of opening the document to print to PDF will change the date.

Establishing the date when a memo or letter was written can be key to defending yourself against a legal malpractice claim. If your office is paperless, a setting like "update automatically" can have devastating results, since there is no paper record to fall back on.

The Right Way to Use Date Fields

Before using any field codes in Word, you should understand what they are and how they work. For instance, Word has six different fields under the Date and Time category: CreateDate, Date, EditTime, PrintDate, SaveDate, and Time. Each field has a different effect when inserted into a document or template. Here are the meanings:

- CreateDate refers to the date the document was created
- Date refers to today's date
- EditTime represents the total document editing time
- PrintDate is the date the document was last printed
- SaveDate is the date the document was last saved
- Time is the current time

When you insert a date using the Date & Time button from the Header & Footer toolbar in Word, you are using the "Date" field which produces "today's date." "Today's date" will be "updated automatically" if the checkbox is selected. (The same effect occurs in WordPerfect when you select Insert >Date/Time… >Insert. The only saving grace: "keep the inserted date current" is *not* checked by default.)

It's easy to see how date and time fields create confusion, and Word doesn't make the process any easier. In the Header & Footer toolbar, only "today's date" is readily accessible. CreateDate, EditTime, PrintDate, SaveDate, and Time are under the Insert tab. Choose Insert, then in the Text group, select Quick Parts. Click on Field… In the Categories box, select Date and Time.

If your intention is to insert a date field that will accurately reflect the date the document was created, use "CreateDate." Or if date fields give you the willies, the safest bet may be to avoid them altogether and manually enter the date in your documents.

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