

STAFF TRAINING PROGRAM

Courtroom Services

WORKSHOP OBJECTIVES

- ◉ Know the audience, objectives, and organizational format for the Staff Training Program
- ◉ Understand the purpose and objectives for the different phases with the program
- ◉ Recognize how the performance management elements are integrated within the program
- ◉ Be aware of the resources needed for program development

TRAINING OBJECTIVES



- ◉ One approach to serve multiple training needs
- ◉ Trainee's acquire information and skills incrementally
- ◉ Check performance during training
- ◉ Document institutional knowledge
- ◉ Match appropriate training method to content
- ◉ Expand training ownership
- ◉ Save time, train faster

*We use the program to achieve multiple objectives for our court.

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TRAINING AUDIENCE

- ◉ Case Administration / Public Services
 - Entry level for operations
 - Duties - Intake (Front Counter), Mail. Phones
 - Manage cases from open to close for assigned digits
- ◉ Courtroom Deputies
 - Assigned to judge
 - Includes Relief CRDs, must cover all CRDs
- ◉ Training needs:
 - New employees
 - Existing staff assigned to a new position or whose job is changing
 - Staff assigned for back-up duties
 - Anyone who is just curious about other jobs in the court

*We use the program for all of these training needs.

TRAINING AUDIENCE

STAFF TRAINING PROGRAM [HOMEPAGE](#) [Media Library](#) [Resources](#) [Glossary](#)
Southern District of California Bankruptcy Court

Welcome Aboard
Public Services
Case Management
Courtroom Services
Training

The **Staff Training Program** is designed to provide a full range of in-depth training of court job functions and growth opportunities for all court staff. The training is divided by job position or team and then is split by topics into Lesson Plans. The full program consists of three phases that build upon each other. Phase 1 is self-paced, online general education available to all staff. Phase 2 adds classroom training to the program, allowing the trainee to practice what they're learning. Phase 3 matches the trainee with a job coach to apply the training to the real job. Learn more about the [three phases here](#).

The Staff Training Program meets training needs for a variety of situations for all court staff. This training program can be used for new employees, existing staff assigned to a new position or whose job is changing, staff volunteering for back-up duties, or for anyone who is just curious about other jobs in the court. The combination and sequence of Lesson Plans taken depends on each person's [reason for taking the training](#).

To begin the staff training program, choose the area of the court you wish to learn more about.

Administration	Operations	Welcome Aboard
Budget/Procurement	Public Services	Welcome Aboard
Finance	Case Management	
Human Resources	Courtroom Services	
Systems		
Training		

Staff Training Program Homepage

We created a Portal page to allow the different audience to be worked on simultaneously.

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ORGANIZING CONTENT

◉ Lesson Plans

- Each primary duty becomes a Lesson Plan.
- Lesson Plans may be divided into modules.
 - Example, Modules in the CRD Overview Lesson Plan: Role of CRD, Terminology, Resources and Procedures.
- Lesson Plans are then sequenced for delivery.
 - Example, in Courtroom Services:
 - 1st – CRD Overview
 - 2nd – Communication Skills
 - 3rd – Noticing Guidelines
 - 4th – Scheduling & vCal
 - 5th – In-Court Duties

*Organize the Lesson Plans in a logical flow.

LESSON PLAN CONTENT

Phases

- ◉ Phase 1 - Online
- ◉ Phase 2 - Classroom
- ◉ Phase 3 - Coaching

Content

- ◉ Who, what, why
- ◉ Basic terminology
- ◉ Introduce technology
- ◉ How duties are done
- ◉ Exercises, practice
- ◉ Work with Job Coach applying new skills

*Delivery method changes in each phase. Skills and knowledge check is required in each phase.

ONENOTE

CRD Overview Communication Skills Noticing Guidelines ... +

Search (Ctrl+E) 🔍

Staff Training Program / Courtroom Services

Wednesday, March 21, 2018 12:38 PM



COURTROOM SERVICES

Southern District of California Bankruptcy Court

Courtroom Deputies (CRD) manage the judge's case load by performing court or court calendaring, recording pertinent results for minutes, processing orders, and maintaining a high level of knowledge and complexity regarding court or courtroom operations, federal and local rules while providing customer support to attorneys, trustees and the

Courtroom Services Lesson Plans

I	CRD Overview
II	Communication Skills
III	Noticing Guidelines
IV	Scheduling & (vCal)
V	Preparing the Calendar
VI	In-Court Duties
VII	Minute Orders
VIII	E Orders Process

+ Add Page

Staff Training Program / Courtroom Services

- CRD Overview
- Role of CRD
- Terminology
- Resources
- Procedures
- Observe CRD Court Functions
- Coach Guide
- Terms / Descriptions

Electronic Notebook.

PHASE 1 - ONLINE

- ◉ Content

- Who does the job?
- What do they do?
- Why is it important?
- Terminology - Basic language and concepts
- Technology - Introduce systems used - CM/ECF, vCal, Local Rules, CSD Forms
- Additional Resources

- ◉ Performance Management

- Check Your Knowledge Quiz

- ◉ Training works with Subject-Matter-Experts (SME) to develop content

- ◉ Designed to stay fresh - little on-going maintenance

Let's look at each phase in a little more in depth. Self-paced.

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Phase 1

*Fully online

Phase 1 Online Lesson Plan: CRD Overview

OBJECTIVE

As you learn more about the role of a Courtroom Deputy you will become more familiar with their terminology. You will be familiar with resources to assist your learning and to provide customer service.

Modules:

- [Role of CRD](#)
- [Terminology](#)
- [Resources](#)
- [Procedures](#)
- [Observe CRD Court Functions](#)

After reading the Modules, complete the Check Your Knowledge and see Resources.

[back to top](#)



[Resources](#)



[Check Your Knowledge](#)

Phase 2 Classroom

OBJECTIVE

You will be able to:

- Describe how the Courtroom Deputy supports the Judge and Chambers.
- Describe the typical CRD workday on hearing days and non-hearing days.
- Identify matters typically set on a Law and Motion Calendar.
- Describe common documents and why they're filed.
- Utilize CRD procedures in the Staff Procedure Manual & OneNote.

[back to top](#)



[Schedule Training](#)

Phase 3 Apprentice

OBJECTIVE

You will be able to:

- Describe the Role of the CRD and tasks needed to support the Judge and Chambers.
- Describe when to use the Local Rules in order to answer questions for the customer.
- Explain how and why the calendar is the focal point of what takes place in court.
- List available CRD procedures in the Staff Procedure Manual & OneNote.

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[Job Coach Guide](#)

PHASE 1

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PHASE 2 - CLASSROOM





- ◉ Content
 - How is the job done?
 - How do I use the system to do the job?
 - What forms/rules/procedures are used?
- ◉ Performance Management
 - Practice cases/filings
 - Quizzes
 - Exercises
- ◉ Training builds 'training' cases
- ◉ Updated for system/rules/forms/processes

*Practice in a mock environment.

PHASE 2

Phase 2

*Hands on training

<p>Phase 1 Online Lesson Plan: CRD Overview</p> <p style="text-align: center;"><u>OBJECTIVE</u></p> <p>As you learn more about the role of a Courtroom Deputy you will become more familiar with their terminology. You will be familiar with resources to assist your learning and to provide customer service.</p> <p>Modules:</p> <ul style="list-style-type: none"> • Role of CRD • Terminology • Resources • Procedures • Observe CRD Court Functions <p>After reading the Modules, complete the Check Your Knowledge and see Resources.</p> <p style="text-align: right;">back to top</p>	 Resources  Check Your Knowledge
<p>Phase 2 Classroom</p> <p style="text-align: center;"><u>OBJECTIVE</u></p> <p>You will be able to:</p> <ul style="list-style-type: none"> • Describe how the Courtroom Deputy supports the Judge and Chambers. • Describe the typical CRD workday on hearing days and non-hearing days. • Identify matters typically set on a Law and Motion Calendar. • Describe common documents and why they're filed. • Utilize CRD procedures in the Staff Procedure Manual & OneNote. <p style="text-align: right;">back to top</p>	 Schedule Training
<p>Phase 3 Coach</p> <p style="text-align: center;"><u>OBJECTIVE</u></p> <p>You will be able to:</p> <ul style="list-style-type: none"> • Describe the Role of the CRD and tasks needed to support the Judge and Chambers. • Describe when to use the Local Rules in order to answer questions for the customer. • Explain how and why the calendar is the focal point of what takes place in court. • List available CRD procedures in the Staff Procedure Manual & OneNote. <p style="text-align: right;">back to top</p>	 Job Coach Guide

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PHASE 3 - COACHING

- Content

- Works with assigned Coach - someone in the job
- Apply the Lesson Plan topic to the job
- Coach Guide
- Competency Test

- Performance Management





- Coach completes Competency Check - may share with Trainee's supervisor

- Training works with managers to develop Competency list

We have a coach workshop that is delivered to new coaches.

PHASE 3

Phase 3
→
*Work with Coach

<p>Phase 1 Online Lesson Plan: CRD Overview</p> <p style="text-align: center;"><u>OBJECTIVE</u></p> <p>As you learn more about the role of a Courtroom Deputy you will become more familiar with their terminology. You will be familiar with resources to assist your learning and to provide customer service.</p> <p>Modules:</p> <ul style="list-style-type: none"> • Role of CRD • Terminology • Resources • Procedures • Observe CRD Court Functions <p>After reading the Modules, complete the Check Your Knowledge and see Resources. back to top</p>	 Resources  Check Your Knowledge
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TRAINING PLANS

- Training plans are built for each training need
 - Determine which Lesson Plans are needed
 - Add dates for Check Your Knowledge and Phase 2 classes
- Vary Depending on Training Needs:
 - New employees need every Lesson Plan
 - Existing staff assigned to a new position or whose job is changing need select Lesson Plans
 - Staff assigned for back-up duties need select Lesson Plans
 - Anyone who is just curious about other jobs in the court may just complete Phase 1 on their own

*Existing staff assigned to a new position or whose job is changing.

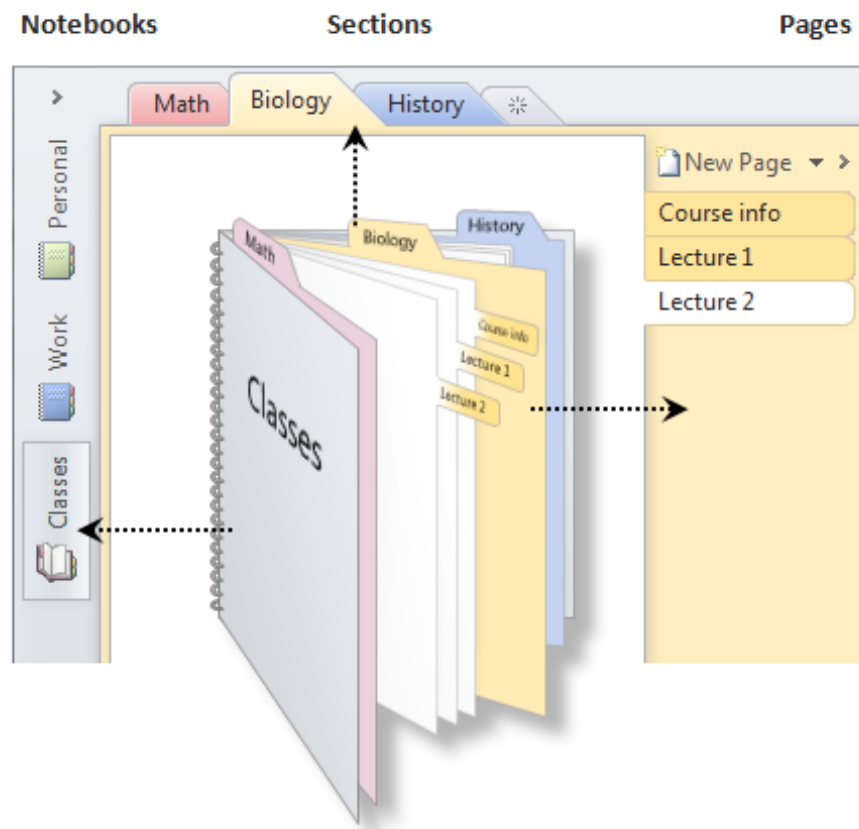
TRAINING PLANS

CRD Relief Training Plan

Lesson Plans	Topics	Phase 1 Online Due	Phase 2 Class	Phase 3 Coaching Begins	By the end of this Lesson Plan, the Relief CRD should be able to:
CRD Overview	Role of CRD Terminology Resources Procedures Observe CRD court functions Legal Advice	Nov 30 Dec 3	Dec 3 ATC Room 9:00 am Dec 8 – Legal Advice; Sm Conf. Room; 9:30 am	In Court Experience may begin upon approval of Phase 1 CYK Other topics begin on Dec 6 Dec 8	<ul style="list-style-type: none"> Describe how the Courtroom Deputy supports the Judge and Chambers. Describe the typical CRD workday on hearing days and non-hearing days. Identify matters typically set on a Law and Motion Calendar. Describe common documents and why they're filed. Give an example of when to use the Local Rules in order to answer questions for the customer. Utilize CRD procedures in the Staff Procedure Manual. Explain how and why the calendar is the focal point of what takes place in court. Describe the CRD court related functions. Answer questions without giving legal advice.

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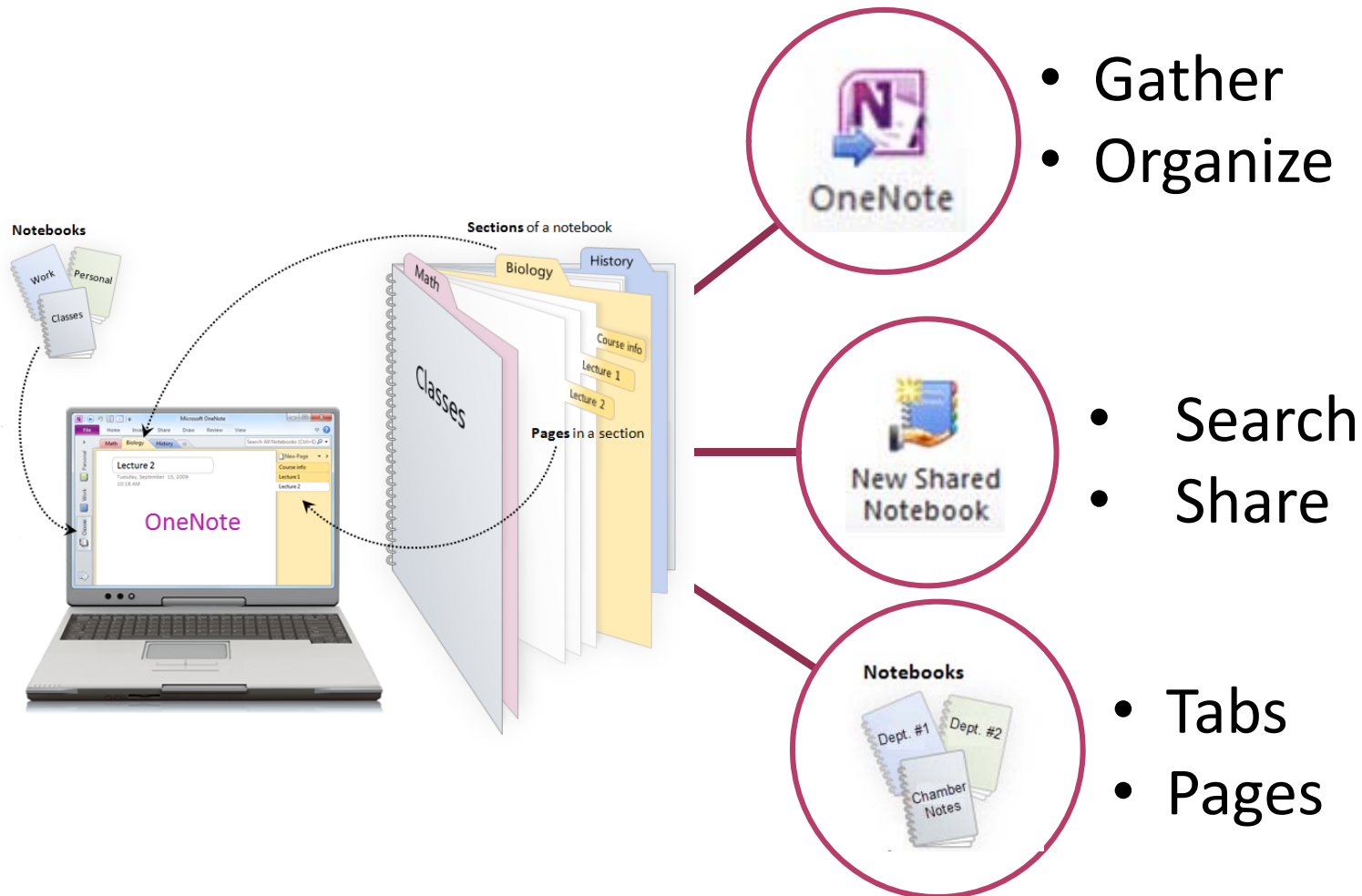
Chamber Notebook



Each CRD has their own notebook.

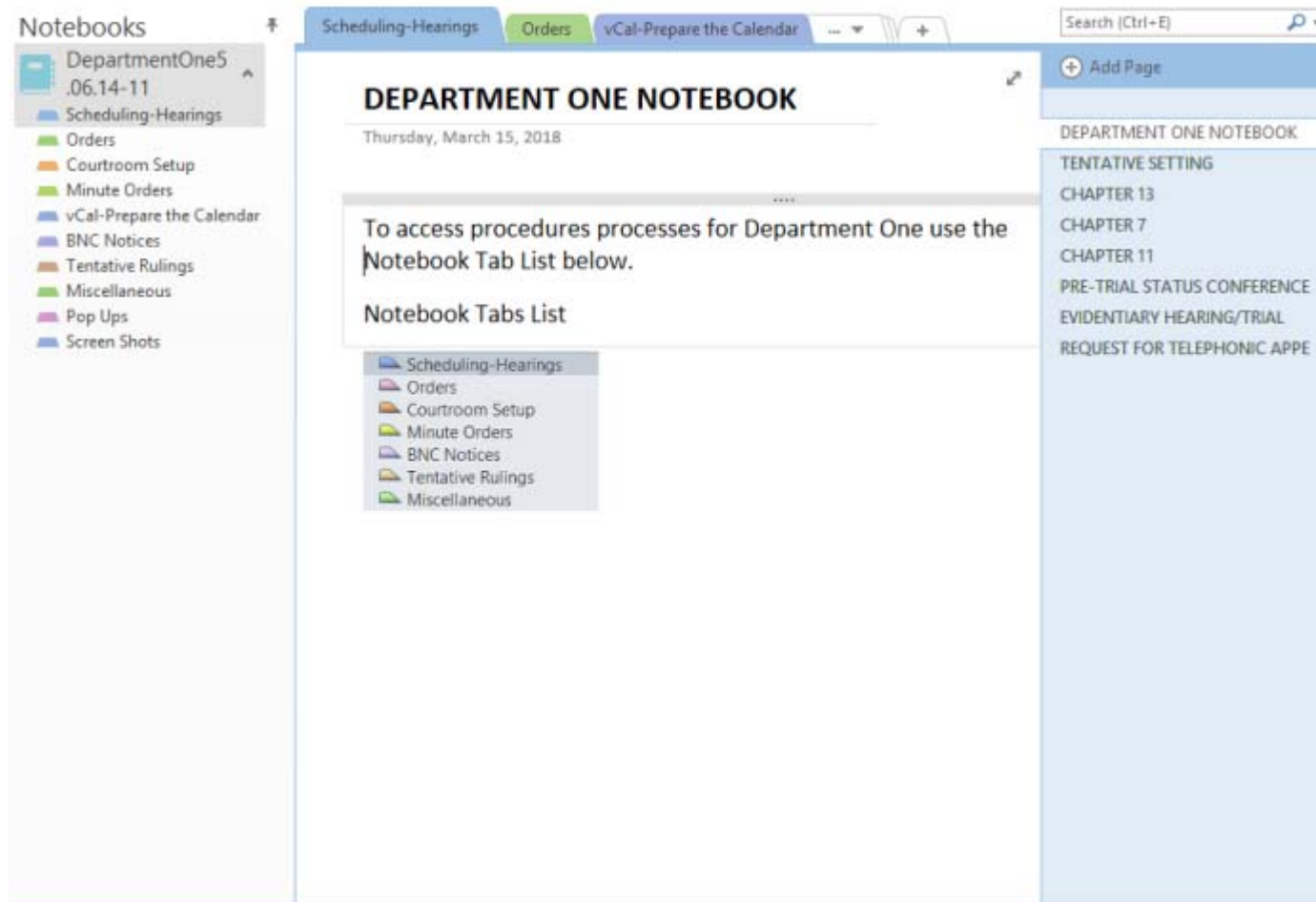
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*Gather as many types of digital content (photos, videos, diagram, web links.

ONENOTE



<https://sdso.newwaytolearn.com/content/view?cguid=c40bbea8-48ca-11e8-80de-000d3a71ced1&tguid=671070e9-c904-11e5-b6c0-782bcb0b655b&tguid=74287952-9b77-11e6-8107-064ffd71b796&rtid=1&statusid=9>

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LINK TO DEMO

Staff Training Program

[http://intranet/stpportal/
StaffTrainingProgramPortal.htm](http://intranet/stpportal/StaffTrainingProgramPortal.htm)

OneNote - Handout

RESOURCES

- Files at CASB Intranet Site -
Software FTP link
- Education Specialist
 - Monette Warren - CRD
- HR& Training Manager
 - Kathy Noel