

What is a Deposition Summary?

A deposition summary is an objective, concise clerical digest of the main points of a deposition transcript. The summary identifies important points in the deposition by page and line. "Page-Line" summaries are typically formatted to include columns for (i) page-line; (ii) exhibit; and (iii) summary of testimony. While there is no hard and fast rule, the transcript to deposition summary ratio is approximately 10:1 pages.

Must lawyers prepare deposition summaries?

No. Deposition summaries do not provide subjective legal advice or opinion. They are digests of the testimony presented and are not intended to replace reading the actual transcript. They can be prepared by anyone with a legal background and experience with reviewing depositions with an understanding of transcript formatting. Aptara uses a team of attorneys with this experience along with a support team of subject matter experts with graduate degrees in English, business, science and technology.

Are outsourcing deposition summaries approved?

Yes. Outsourcing legal services, including deposition summaries, has been approved by the American Bar Association (ABA), state and local bar associations, and the National Court Reporters Association (NCRA). The NCRA has further held that, while a court reporter may not summarize a deposition transcript, there is no restriction for a deposition company to partner with a deposition summary provider. See *Advisory Opinion 32 of the NCRA (1997)*.

Who prepares Aptara's Deposition Summaries?

Aptara's deposition summaries are prepared by dedicated teams of professionals. The team is comprised of attorneys along with an additional staff with specialized backgrounds in law, science and technology and English. All of our specialists have undergone extensive training, including instruction by senior lawyers and law school faculty, on accurate, concise and active English; deposition practice; legal subject matter and procedure; unauthorized practice of law; confidentiality; duty of loyalty; malpractice; and statutes of limitation, among other areas of law.

Why outsource deposition summaries?

While lawyers and their support staff traditionally summarized depositions, today fewer clients and insurance companies reimburse hourly firm rates for summaries. If they do reimburse, the firm rate is usually reduced. Outsourced deposition summaries are a less expensive alternative to summaries prepared in-house.

Where deposition summaries are outsourced, traditional firm rates may still be applied to other important areas related to the summary, such as outlining, word searching, or exhibit review. *Outsourcing deposition summaries simply promotes firm productivity. Efficiency is rewarded by clients and insurers because fewer—not zero—billable hours are devoted to deposition summaries.*

Deposition Summary FAQ

How is the work kept confidential?

Every deposition summary specialist signs a confidentiality agreement at the time of joining Aptara. Each receives instruction on confidentiality, privilege and ethics, with periodic updates. Specialists are not permitted to carry any paper or storage devices inside or outside the company, and they maintain clean desks at the start and finish of each work day. Each system user is assigned a unique ID and PWD to log onto the system. Similar access policy is followed for accessing the servers. Server access is limited to the user group. We have disabled USB access on our PCs and none of the systems have access to CD drives. A firewall is used to restrict public email accounts and internet access is granted only on an as-needed basis. Background checks are performed for (1) employment history; (2) education; (3) residence; (4) criminal background; and (5) general references. For specific clients we may also request a drug test.

Are Aptara's Deposition Summaries HIPAA Compliant?

Yes. Copies of Aptara's executed HIPAA Business Agent Agreements are filed and available for review.

Describe the Deposition Summary Workflow

Aptara's deposition summary customers either forward transcripts as email attachments or upload them onto a secured FTP web site. Upon receipt, a team leader assigns the transcripts for summary writing, quality assurance and copyediting. A Project Manager emails or uploads the summaries onto the FTP. The Project Manager also provides regular reports.

Three team members are generally assigned to each transcript:

- **Summary Writer** reads through the transcript fully and then drafts the abstract.
- **Copy Editor** corrects spelling and grammatical errors, and
- **Quality Control Analyst** ensures consistency and prepares final format for delivery to the client.

To insure consistency, Aptara's specialists follow established guidelines for each deposition. We work with individual customers to refine our approach and develop guidelines more fully. The typical turnaround for a transcript is 24-48 hours. A contact person is available at Aptara 24/7/365.

How do customers pay for deposition summaries?

Customers with individual work orders may pay by major credit card. Customers with larger and/or regular orders are invoiced. A receipt is provided for all work performed.

Are there subject areas that lend themselves more readily to deposition summaries?

Yes. Event-driven litigation are summary-intensive. These areas include, but are not limited to, personal injury, motor vehicle, property loss, construction, workers comp, social security, toxic tort, pharmaceutical & medical device, commercial disputes, and examinations under oath. Summaries can assist attorneys with multiple depositions taking place over a short period of time in order to cut down on pre-deposition review time. Topics with dense or technical testimony benefit from the easy to read summary outline.

Aptara's digital content, learning and performance, and business services solutions are in place at market-leading companies worldwide. Our industry specialists design and implement strategies that capitalize on new digital and mobile technologies for information providers in IT, law, healthcare, pharmaceuticals, insurance, financial services, and publishing. Aptara solutions uncover new revenue streams, improve operations, and realize cost savings for enterprises. Aptara is the largest provider of outsourced deposition summaries in the U.S., with a trained staff of more than 250 full-time professionals summarizing more than 400 deposition transcripts a day – more than 2M pages/year – for national and regional court reporting companies, as well as for law firms, insurance companies and corporations. Founded in 1988, Aptara is headquartered in the United States and has offices on four continents. Our parent company, iEnergizer, is publicly traded in the UK. ■ ■ ■

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