



# Allegis Legal Transcription Guide

**Allegis**<sup>®</sup>  
TRANSCRIPTION

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## 1 HOUSEKEEPING ITEMS

### 1.1 Information Documents

Each job may come with accompanying text documents such as time-stamped information from the stenographer or (digital) court recorder, an audio-recording worksheet with the case caption, appearances of counsel, dates, name spellings, addresses, and other pertinent information. Please make sure to utilize these. The time-stamped notes may have some minor spelling errors because these are taken live, concurrent with the proceeding. Make sure you do your usual research. If you cannot verify the spelling of a name but it's included in the reporter's notes, you may default to that spelling.

### 1.2 Transcriber Worksheet

For each transcript there will need to be a Transcriber Worksheet filled out. Name the worksheet as Worksheet<job#>.Transcript<transcript#>.

Please include only the following information on the sheet (see sample in Appendix):

- Transcriber – Your name
- Customer job No. – This is the number in the claims number column in the TMS
- Allegis transcription No.
- Case/Ref: Either the Case name or the witness's name if there is not a court case associated with the transcript /Case number. For example: **Party A v. Party B / Case No. 123456789**
- Inaudibles – the Page, Line and Time (with media letter/number if audio is split into multiple files)
- [sic] -- the Page, Line and Time (with media letter/number if audio is split into multiple files)
- You do **not** need to fill out the ALLEGIS BILLING information at the bottom of the worksheet. We will continue to send your weekly page report.

## 2 TEMPLATES and DOCUMENT FORMATTING

The templates for Examinations under Oath (EUOs), depositions, hearings and trials are preformatted per customer and Allegis's legal style.

### 2.1 Lines

Some templates have 22 lines per page and some have 25. **Make sure ALL the pages have the correct number of lines for the specific template you're using, including the Certificate of Transcriber and Reporter Certificate pages.**

### 2.2 Naming convention

- Please name your transcript: **Job <job#><initials of deponent if it is a multiple-interview job> .Transcript<transcript#>** when you Save As.

- The job number will be in the claim number field in the TMS, if you're using Audioworxs as your player. Example:  
Job123456.Transcript12345678  
Job123456PT.Transcript12345678

### 2.3 Font

The templates are in Courier New and all transcription should also be Courier New 13 point or 12 point, depending on the customer. Veritext templates are in 13 pt. and Verbatim are in 12 pt.

### 2.4 Cover page

- **Cover pages for EUOs, Depositions, Hearings and Trials** - Include deponent's or witness' name, claim or case number, date and time, location, and the reporter or recorder's name (if applicable). Note: Not all reporters are court reporters. Some are digital audio reporters. If they speak, please use the same title for all of them: COURT REPORTER.
- **The cover page information should match that of the Notice of Deposition/EUO/etc. or Reporter Worksheet if the Notice is not provided. Please also match the style from the Notes, if provided. Example:**

**SUPERIOR COURT OF THE STATE OF CALIFORNIA  
FOR THE COUNTY OF SAN FRANCISCO**

### 2.5 Header

- **EUO** – Witness name and date should be filled out for every transcript.  
**Examination Under Oath, John Doe, 8/18/2018**
- **Deposition and Hearings** – Case name, type of proceeding, witness name and date should be filled out for every transcript.  
**Batman v. Commissioner/Deposition of James Dean, 6/12/2018**
- **The header information should match that of the Notice of Deposition/EUO/etc. or Reporter Worksheet if the Notice is not provided.**

#### 2.5.1 Line Spacing

The templates are set up with correct spacing. Make sure you select the correct template by proceeding and customer.

## 2.5.2 Indentation settings

- Q&A – at 0.5
- Colloquy – at 1.0 (for Verbatim, 0.5)
- Parentheticals – at 1.0

The templates have preset formatting for each customer.

## 2.5.3 Paragraphing

Paragraphing is acceptable formatting legal transcripts. Please see the Allegis Legal Manual section on Paragraphs for more in-depth information.

## 2.5.4 Certificate of Transcriber page

- Includes the date and transcriptionist's signature. This signature should be typed; it doesn't need to be written and scanned into the document.
- Include the Case name and the Case number.
- DATE and Transcriber Name lines should look like this:

6/20/2018 \_\_\_\_\_

DATE JANE DOE

## 2.5.5 Reporter Certificate page

This page is part of the template and the reporter's name should be typed in the spaces provided. If there is no reporter present, please remove this page. The highlighted message on the first line of this certificate page should be deleted if the page is used. Be sure to add returns at the bottom of the page so the page has the correct number of line numbers showing – 22 or 25, depending on the template.

## 2.5.6 Acknowledgement of Deponent page

This page is part of the template and should be included ONLY IF the signature was reserved. That is, if the box for Read and Sign is checked Yes on the Audio Reporter Worksheet, or if you can hear the attorney and/or witness say they wish to read the transcript. Fill in the witness's name and the name and address of the handling attorney. The handling attorney is the witness's attorney. The taking attorney is the main Q in the deposition or EUO.

## 2.5.7 Appearance page

Includes the names of the attorneys present. If someone is present who is not listed in the information documents and no title for them is given, please list them last as

Also appearing:

### 2.5.8 Contents page

Includes the name of the witness, the name of the attorney, and on which page the following starts:

Direct examination (DX): Questioning of a witness by the party that has called the witness to give evidence.

Cross examination (CX): Questioning by the opposing counsel following the direct examination.

Re-direct examination (RDX): The rebuttal to the Cross Examination by the party that called the witness.

Re-cross Examination (RCX): The rebuttal to the Cross-Examination rebuttal, done by the opposing party.

If any of the aforementioned examinations are not included in the EUO or deposition, please remove any number symbols and leave blank.

Page 3

1	C O N T E N T S					
2	WITNESS:		DX	CX	RDX	RCX
3	Witness Name					
4	By Ms. Attorney		4			
5	By Mr. Attorney			86		

### 2.5.9 Exhibits Page

After the Contents page is the Exhibits page. Number, describe and list the page the exhibit was marked and/or admitted.

Page 4

1	E X H I B I T S			
2	EXHIBIT	DESCRIPTION	MARKED	ADMITTED
3				
4	X-1	Claim	12	
5	X-2	Voter Registration Card	12	





Spoken	Can be typed
Q If there – if there was only one lane in the road.	Q If there was only one lane in the road.
Q How much pay would you have received from those two weeks in 2016? A Well, this is approximate.	Q How much pay would you have received from those two weeks in 2016? A Well, this is approximate. No less than \$2000.
Q Uh-huh. A No less than \$2000.	

**Great effort should be given to keep sentences together whenever possible when two people are speaking.**

### 3.1.1 Informal contractions

Informal contractions are not used in deposition transcripts. Rather than using *gonna*, *wanna*, *shoulda*, *ain't*, *etc.* please use the more formal *going to*, *want to*, *should have* and *am not*. *I'm*, *don't*, *can't* etc. are not informal and are acceptable. Please type *would have*, *could have*, etc. instead of *would've*, *could've*. See p. 33 in the Allegis Legal Manual for further discussion.

### 3.1.2 Inaudible words

Although very rare, if a word or phrase is not understood, please use [inaudible]. All inaudible words and phrases will be listed on the Transcriber Worksheet by page number, line number and the time in the audio. **Any transcript containing [inaudible] must be sent to QA.**

### 3.1.3 Phonetic spelling

Words spelled phonetically should be followed by [ph].

### 3.1.4 Common Words

Please use the following versions of these common words:

Okay – not m'kay or OK.

'Cause –not 'cuz for the abbreviated version of "because."

All right – this is always two words. Never use "alright."

### 3.1.5 Numbers

**GENERAL RULE:** All numbers one through nine are spelled out. Numbers 10 and over are in numerical form. Do not start a sentence with a numeral. (For detailed information and exception to these rules, please see the Allegis Legal Manual section on Numbers.)

- Dates are written using cardinal numbers rather than ordinals, if possible. October 5, 2017. BUT: October 5th.
- Dates spoken as numbers only should be typed with slashes, not dots or periods: 12/12/10 not 12-12-10 or 12.12.10.
- Only use dollar sign if “dollars” is spoken. Only use the percent sign if “percent” is spoken. If you spell out the number, you must spell out “dollars” and “percent” as well.
- Single and double quotation marks are not used to indicate feet and inches.
- Time should be written out if spoken as “*number o’clock.*” If it’s clear in context that people are speaking about time, then “eight fifteen” can be typed 8:15. Otherwise, type as “eight fifteen.”
- Do not use superscript for ordinals. Example: 123 42nd street. Go to File > Options > Proofing > AutoCorrect Options > AutoCorrect and uncheck the box for replace Ordinals (1st) with superscript.
- All lab values and medication dosages under 1 take a leading zero.
- Any unclear number(s) should be spelled out.

#### Transcribed

Q How far away were you?

A About four to five feet

A About five to eleven feet

Q How much Xanax did you take?

A 0.5 milligrams.

Q How much did you pay for that?

A About four to five dollars.

A About 10 to 11 dollars.

A About \$5

A One hundred to one hundred-twenty dollars.

A \$120

Q What time was it?

A 8:15 (if it’s clearly time)

A Eight o'clock

Q When did that happen?

A Nine thirty

A 10 to 10

#### Spoken

“About four to five feet”

“About five to eleven feet”

"Point five milligrams"

“About four to five dollars”

“About ten to eleven dollars”

"About five dollars"

“One hundred to one hundred- twenty dollars.”

"A hundred twenty dollars"

"Eight fifteen"

"Eight o'clock"

If unclear whether time or date

"Ten to ten"

### 3.1.6 Pauses

Pauses should ***not*** be indicated in transcripts.

### 3.1.7 Strike that

The phrase “strike that” and all words before and after should be **included** in the transcript.

### 3.1.8 Interruptions and trailed off testimony

Interruptions should be indicated by a dash (using two hyphens) rather than an ellipsis. The dash should also precede the continuation of a statement if indicated. Note: Depending on your version of Word, you may need to change your settings so a double hyphen does not automatically turn into an em dash (a longer single line).

MR. SMITH: That’s why I --

Ellipses are to be used for trailing off only. These are not often used in legal transcripts. Make sure you have a space before the ellipses begin:

MR. SMITH: And that’s all I know about that, so ...

Note: Please do not overuse dashes or ellipses. If it is possible to make a complete sentence, do so.

### 3.1.9 Quotation Marks

The standard double quotation mark is used for depositions and EUOs. Please turn off smart quotes in Word. Go to File > Options > Proofing > AutoCorrect Options > AutoCorrect and uncheck the box for replace straight quotes with smart quotes.

### 3.1.10 Italics

For any titles, case captions, etc. that are **within the body of the transcript**, please use italics and not underlining.

*Doe vs. District of Columbia*, NOT Doe vs. District of Columbia

### 3.1.11 Annotations

- Annotations use brackets; parentheticals use parentheses.
- [sounds like], [crosstalk], [RD] and [laughs] **are not used** in legal transcripts.
- [sic] may be used *only if* the speaker makes a factual error that is not corrected later or questioned by an attorney. Example: The witness say that they were CEO of SUPER Corporation in 1915 when the witness is clearly not over 100 years old, and no attorney questions or corrects this statement. **If you use [sic], you must put it on the Transcriber Worksheet with a time stamp and route the job to QA.**
- [inaudible] is used if you are unsure of what you’re hearing.
- [ph] If you really think you’re hearing correctly but you can’t document the term, you can use [ph] which stands for "phonetic." Be very judicious with the [ph] annotation; it

is better to send an inaudible for QA to fill in than to have incorrect term in a transcript which goes directly to the customer.

- [No audible response.] is used for answers that are given as gestures only, for example a nod of the head. This would either be marked in the notes, or noted in the transcript itself ("Was that a yes?"). See Indiscernible Speech in the Manual for more examples.

### 3.1.12 Capitalization

The titles of all documents and notices should always be capitalized. For example: Notice of Deposition Duces Tecum.

## 4 SPEAKER IDENTIFICATION

There are a few major differences in the way the speakers are identified in an EUO or deposition as opposed to an informal recorded statement. Allegis's legal style has NO colon after the speaker tokens Q and A.

### 4.1.1 Colloquy

During colloquy, the speakers should be identified using all caps using the honorific **MR.**, **MS.** (MRS. is not used) or **DR.** along with the appropriate last name and then a colon. Start typing two spaces to the right of the colon. After the colloquy, identify Q again by name as shown below, aligned left.

- By line: Make sure to add the **BY MR./MS. NAME:** statement each time Q speaks following colloquy no matter how brief the colloquy is (even if it is a single line).

Example (Here Q is Ms. Jones and Mr. Smith is the witness's attorney):

Q Okay. Can you describe the layout of the roadway?

MR. SMITH: Objection for form. Go ahead and answer.

MR./MS. WITNESS'S LAST NAME: I would say it's flat.

BY MS. JONES:

Q Okay. So you're familiar with the area where the accident occurred, correct?

A Yes.

- **Exception: In Hearings/trials, always use THE WITNESS to identify the deponent in colloquy rather than MR./MS. LAST NAME.**

#### 4.1.2 Interpreter

If an interpreter is present, the answers given should still be in Q and A format and use THE INTERPRETER for the interpreter only if they are speaking for themselves. **Please see the Interpreted Guidelines for a more extensive explanation.**

#### 4.1.3 Court Reporter

COURT REPORTER should be used for identifying the court reporter as well as the digital audio reporter.

#### 4.1.4 ATTY vs. Q

ATTY is never used in legal transcripts. An examination by an attorney is always prefaced by the BY MR. or MS. identifier, and then followed in Q and A format.

### DIRECT EXAMINATION

BY MR. JONES:

Q Good morning. Thank you for appearing today.

A Good morning.

#### 4.1.5 Judge

In Hearings/trials, when the Judge speaks, she is always addressed in colloquy as THE COURT.

#### 4.1.6 Unidentified Speaker

If there are unidentified speakers, use UNIDENTIFIED SPEAKER\_#. If there are multiple unidentified speakers, distinguish between them using numbers.

## 5 PARENTHETICALS

Parentheticals are used to record an action or event. Wording for parentheticals should be clear and concise. **Parentheses are always used for parentheticals, not brackets. Brackets are used for annotations.**

#### 5.1.1 Exhibits

One of the most common uses of a parenthetical is the marking of an exhibit. When transcribing from an audio file only, we need to listen for the verbal clues that an exhibit has been marked. Generally, this will come from the court reporter, but this may also come from an attorney remarking that the exhibit was marked. After this has been noted, the parenthetical (Whereupon, Deponent's (or Petitioner's, Plaintiff's, Defendant's) Exhibit 1 was marked for identification) should be typed on its own line.

MR. SMITH: Let me show you what I'm going to have marked as Deponent's Exhibit No. 1. Can you identify what the photograph shows?

(Whereupon, the document referred to was marked for identification as Deponent's Exhibit 1.)

MR./MS. WITNESS'S NAME: That's the back of the car.

BY MR. SMITH:

Sometimes, it might not be stated specifically that an Exhibit has been marked. When an Exhibit is mentioned for the first time, it should be followed by the parenthetical to indicate its entrance in the record. If it is clear that the Exhibit was already marked, do not include the parenthetical statement.

If it does not say in the information documents or the audio whose exhibit it is, please simply use Exhibit # as the identifier:

(Whereupon, Exhibit 1 was marked for identification.)

If there is no information in the reporter's notes, and you cannot tell from context whether the exhibit is being marked, mark it anyway just to be safe.

#### 5.1.2 Off the record:

When an attorney asks to go off the record, the parenthetical (Off the record) or (Discussion held off the record) should be inserted into the transcript. Usually, when something is off the record, the recorder is turned off. You would transcribe the parenthetical (Off the record) and nothing else until someone says "back on the record" or something similar.

If for some reason the recorder is **not** turned off and they continue speaking, ending with "back on the record," **do not transcribe whatever is said off the record.**

If for some reason the recording does **not** include some version of "back on the record," please do transcribe everything you hear. We should assume in this case that what is recorded is all on the record.

#### 5.1.3 End/beginning of the media file:

If the audio is in sections, the reporter may end/begin each section with a comment like this:

COURT REPORTER: This marks the end of media number one. The time is now 2:37 p.m. We are off the record.

(Off the record.)

(End Media 1.)

(Begin Media 2.)

COURT REPORTER: This marks the beginning of media number two. The time is now 3:00 p.m. We are on the record.

#### 5.1.4 End of the deposition:

The information of what time the deposition ends should be in the information sheet provided. Using that information, the parenthetical noting the end time of the deposition should be inserted.

(Whereupon, at 12:10 p.m., the deposition of FIRST NAME INITIAL LAST NAME was concluded.)

## 6 Interpreted Guidelines

### 6.1.1 Appearances Page:

Include the following information on the Appearances Page for the interpreter (if you have it):

- Name
- Agency
- Phone number
- Certification number

### 6.1.2 Interpreter Oath:

Use the following parenthetical for the swearing in of the interpreter:

*(Interpreter Name sworn to translate between English and (insert foreign language).)*

### 6.1.3 Basic Rules:

- Because the interpreter speaks for the witness, all interpreted answers should be designated as A.
- If the interpreter or attorney uses third person language, format as colloquy. (See example 1 below.)
- If the witness answers in English and the interpreter repeats this answer, simply type the interpreter's answer after the A speaker token. Do not include the witness's English answer.
- If the witness sometimes answers in English and this is not repeated by the interpreter, then include this parenthetical at the beginning of the transcript (see example 3 below):

(All answers through interpreter unless otherwise noted.)

**EXAMPLES:**

1. Interpreter and/or attorney beings to speak in the third person -> format as colloquy

Deposition or EUO		Hearing	
Q	And what is your address?	Q	And what is your address?
A	1234 West Main Street.	A	1234 West Main Street.
	MR. SMITH: Ask him how old he is.		MR. SMITH: Ask him how old he is.
	MR./MS. WITNESS'S LAST NAME: I'm		THE WITNESS: I'm 54.
	54.		BY MR. SMITH:
	BY MR. SMITH:	Q	How old did you say you are?
Q	How old did you say you are?		THE INTERPRETER: He says he's 54.
	THE INTERPRETER: He says he's 54.		BY MR. SMITH:
	BY MR. SMITH:	Q	Do you have any children?
Q	Do you have any children?		THE INTERPRETER: He said he has three.
	THE INTERPRETER: He said he has three.		

2. Interpreter asks for clarification or additional information -> format as colloquy

Q What is your current address?

THE INTERPRETER: Excuse me, Counsel, what was the question?

BY MR. SMITH:

Q What is your current address?

A 1234 West Main Street.

3. Witness answers sometimes in English and other times in a foreign language -> indicate when answering in English **and** add parenthetical at the beginning of testimony following the swearing in of the interpreter: {All answers through interpreter unless otherwise noted.}

Q How many children do you have?



A (In English) Three.

4. Interpreter speaks for witness while in colloquy:

*Deposition or EUO* INTERPRETER (FOR MR./MS. WITNESS'S LAST NAME) :

*Hearing or trial* INTERPRETER (FOR THE WITNESS)

5. If a lengthy stand-alone phrase is used in answer to a question and it is not interpreted, include a parenthetical:

A (Speaking in a foreign language.)

6. When there is an issue with the interpretation, i.e. after a lengthy exchange between the interpreter and the witness after which the interpreter simply answers "yes," or the interpreter and witness are speaking without interpretation, do not transcribe and no parenthetical is needed. It is the responsibility of the attorney to clarify the record.
7. If a foreign word or short phrase, i.e., *c'est la vie*, *gracias*, *merci*, is used with no interpretation, it is acceptable to transcribe it as spoken. Make sure to check audio reporter notes for any spellings.

Please check the Allegis Legal Manual for extensive discussion of transcribing interpreted files

**SAMPLE – EUO COVER PAGE**

EXAMINATION UNDER OATH

OF

FIRST MIDDLE LAST

Case No.:

#####

DATE: Day, Month, Year

TIME: ##:## p.m./a.m.

LOCATION: Street Address

City, ST, ZIP

REPORTED BY: First Last

**SAMPLE – DEPOSITION COVER PAGE**

S T A T E: ← The state the court is in. If the state name is included in the title below, delete this line

IN THE CIRCUIT/DISTRICT COURT OF NAMED COUNTY

Copy this information exactly from the Notice of Deposition, EUO, etc. or Reporter Worksheet

----- :  
FIRST LAST, :  
Plaintiff, : ← might be Claimant, Employer, etc,  
v. : Case No.  
DEFENDANT NAME : ##-XX-####-XXX  
Defendant(s) . :  
----- :

DEPOSITION OF FIRST MIDDLE LAST

DATE: Tuesday, September 4, 2018

TIME: 12:21 p.m.

LOCATION: Name  
Street Number  
City, ST

REPORTED BY: Reporter Name, Notary Public

P R O C E E D I N G S

WHEREUPON,

JOHN ADAMS DOE

called as a witness, and having been sworn by the notary public, was examined and testified as follows:

DIRECT EXAMINATION

BY MR. SMITH:

Q All right. Good morning, Mr. Doe. Thank you for coming by this morning.

Could you just please state your business address and your full name for the record?

A John Doe. My business address is 1234 Main Street Northeast, Washington, D.C. 20018.

Q Thank you. And who is your employer?

A Acme Business Solutions.

MR. SMITH: Let's go off the record for a minute.

(Off the record.)

BY MR. SMITH:

Q I'm going to -- just for the purposes of questioning you, I'm going to go ahead and give you -- this

is printed directly from the database. And so, in other words, you can see there that that's the back of an ambulance. Here is -- do you see the motorcycle that's there?

A Yes, I do.

Q Okay. I want to go ahead, and I'll mark this.

MR. SMITH: Can you please mark this as Deponent's Exhibit 1?

(Whereupon, Deponent's Name Exhibit 1 was marked for identification.)

Q I'll go ahead and -- while he's doing that. You have a -- do you have a copy of the --

A Mm-hmm. Yes.

Q Okay. That is all.

(Whereupon, at 10:11 a.m., the deposition of JOHN DOE was concluded.)