

School of Continuing Education

Legal Assistant

RPL RESOURCE GUIDE

Legal Office Applications

Course Number: BUSA-1106

Course Hours: 60

Credit Hours: 4

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Introduction

At Red River College, Recognition of Prior Learning (RPL) is a process in which individuals have the opportunity to obtain credit for college-level knowledge and skills gained outside the classroom and/or through other educational programs. It is a process which compares an individual's prior learning, gained from prior education, work and life experiences and personal study, to the learning outcomes in college courses.

The individual demonstrates this learning through valid, rigorous assessment methods which follow College policies and procedures and ensure that credible learning has taken place. If the learning demonstrated is equivalent to what would normally be acquired through a formal course(s) in the chosen area of study, then credit is granted. College faculty are the course experts who assess the learning and determine the credit awarded for prior learning.

This ***Recognition of Prior Learning (RPL) Resource Guide*** will assist you with the RPL process for **BUSA-1106: Legal Office Applications**. You can begin the RPL process by reviewing the information in this guide. Start by examining the course description and learning outcomes for the course, and then review and complete the Self-Assessment Checklist. The requirements of the RPL process (i.e. how to prove your prior learning) and the criteria for assessing your prior learning are also outlined in this guide.

BUSA-1106: Legal Office Applications

Course Description

What are the different types of legal systems and laws? How does our Court system work? What role do lawyers fulfill? What laws and guidelines apply to lawyers and their support staff? What are the basic responsibilities of the legal administrative assistant? What can you expect to do on the job as a legal administrative assistant?

The aim of this Course is to assist the student to become more familiar with daily procedures common to most modern businesses, and, more specifically, to the legal office. To achieve this goal, the student will study basic office functions and general business practices, together with routine law office procedures and management. A core component of the Legal Administrative Assistant Program, the Legal Office Applications Course stresses valuable fundamental skill; such as, organizational skills, telephone techniques, handling mail and other information transfers, records management, accounts and billing clients, and preparing a variety of legal documents and correspondence.

Course Learning Outcomes and Elements of Performance

By the end of this course of study, you should be able to . .

1. Demonstrate a general understanding of the different sources and classifications of law and the practice of law.
2. Demonstrate proven time/ resource management and organizational skills
3. Demonstrate effective telephone and mail-handling techniques.
4. Create and maintain tickler and filing systems; create, maintain, retain and archive client records.
5. Make general and trust account entries, private and Legal Aid statements of accounts, statements of funds received and disbursed.
6. Prepare affidavits for notaries public and commissioners for oaths and other general legal documents.

Course Resources

The student may want to review the following resources which are available from the Red River College Notre Dame Campus. The materials listed are **not a requirement for the challenge process** for this course, but are, rather, included as a professional development opportunity to increase the student's repertoire of knowledge, skills, and abilities.

1. Administrative Procedures for the Canadian Office, Seventh Edition, Kilgour et al, Pearson Education Canada Inc., Toronto, Ontario, 2006
2. Legal Office Applications Course Package (available at the Red River Book Zone)

Legal Office Applications - Self-Assessment Checklist

This Self-Assessment Checklist is designed to assist you in determining whether you have prior learning that can be used to prove competence to achieve credit for the **BUSA-1106: Legal Office Applications** course. Complete the checklist by selecting the statements that best indicate your learning, making certain it is an honest and realistic assessment of your knowledge, skills and abilities. Add your score at the end of the checklist and compare your total to the scoring scale listed there.

Rating Scale

- 0 I have no experience or learning in this area.
 1 I have a little experience and learning in this area.
 2 I have some experience and learning in this area.
 3 I have good experience and learning in this area.
 4 I have excellent experience and learning in this area and could teach/mentor it to others.

I am able to:					
1. Canadian and Manitoba Legal Systems: Demonstrate an understanding of the Canadian and Manitoban Legal systems.					
• Differentiate between substantive and procedural law; give an example of each.	0	1	2	3	4
• Differentiate between statute and case law.	0	1	2	3	4
• Summarize the primary contents of Canada's constitution including the Charter of Rights and Freedoms.	0	1	2	3	4
• Identify the different Manitoba Courts and their jurisdictions.	0	1	2	3	4
• Identify the legislation and body which governs the legal profession in Manitoba.	0	1	2	3	4
2. Modern Law Office: Demonstrate an understanding of how a modern law office works.					
• Describe the most common manner in which the personnel in a law office are organized.	0	1	2	3	4
• Identify at least one way in which decisions are made within a private law office.	0	1	2	3	4
• Identify the person(s) to whom you will report and from whom you will receive instructions and performance evaluations.	0	1	2	3	4
• Enumerate the principal skills and functions of a legal administrative assistant.	0	1	2	3	4
• Describe some of the tasks performed by other support staff.	0	1	2	3	4

<ul style="list-style-type: none"> Summarize the importance of reviewing any office employee manual, as well as any style, precedent, and procedural manuals. 	0	1	2	3	4
<ul style="list-style-type: none"> Demonstrate the use of various pieces of office equipment; i.e. photocopy machines, fax machines, postage meters, book binders, e-mail, voice-mail, answering machines. 	0	1	2	3	4
3. Daily Office Procedures: Demonstrate an ability to perform daily office procedures.					
<ul style="list-style-type: none"> Explain the importance of being organized and describe some of the ways of organizing your work area, as well as your resources and daily tasks. 	0	1	2	3	4
<ul style="list-style-type: none"> Explain what it means to prioritize your work. 	0	1	2	3	4
<ul style="list-style-type: none"> Describe different ways to standardize and/or automate repetitious tasks (e.g. when would you use templates, macros, and merge functions?). 	0	1	2	3	4
<ul style="list-style-type: none"> Describe different types of “tickler” or diary systems and how to use them. 	0	1	2	3	4
<ul style="list-style-type: none"> Explain alternative methods for scheduling and for keeping you and your lawyer up-to-date with each other’s activities. 	0	1	2	3	4
<ul style="list-style-type: none"> Demonstrate a knowledge of telephone equipment, including answering machines and voice mail, and of telephone etiquette (how to answer, hold and transfer a call, how to take an effective message). 	0	1	2	3	4
<ul style="list-style-type: none"> Enumerate the various forms of delivery systems available, including mail and courier, and identify the different courier services. 	0	1	2	3	4
<ul style="list-style-type: none"> Describe how to deal with incoming and outgoing mail. 	0	1	2	3	4
4. Manage Client Files: Demonstrate an ability to manage client files.					
<ul style="list-style-type: none"> Explain how to open and close a file. 	0	1	2	3	4
<ul style="list-style-type: none"> Enumerate what is and what is not culled from a file when closed. 	0	1	2	3	4
<ul style="list-style-type: none"> Describe the most effective ways to organize the contents of a file. 	0	1	2	3	4
<ul style="list-style-type: none"> Demonstrate an understanding of the general rules regarding filing (alphabetical, numerical, geographic, governmental, subject). 	0	1	2	3	4
<ul style="list-style-type: none"> Explain how often you should file and the keys to making it easier. 	0	1	2	3	4
5. Statement of Account: Demonstrate an ability to prepare statements of account.					
<ul style="list-style-type: none"> Explain how lawyers keep track of their work on a file. 	0	1	2	3	4
<ul style="list-style-type: none"> Prepare a Retainer Agreement or Letter. 	0	1	2	3	4

• Distinguish between disbursements which are subject to GST and those which are not.	0	1	2	3	4
• Prepare a private client Statement of Account.	0	1	2	3	4
• Differentiate between a law firm's general account and clients' trust accounts.	0	1	2	3	4
• Explain how interest on a trust account is dealt with; explain what a "specific" trust account is.	0	1	2	3	4
• Explain when funds can be moved from either kind of trust account.	0	1	2	3	4
• Explain how to prepare general account and trust account cheque requisitions and receipts and deposits.	0	1	2	3	4
6. General Legal Documents and Forms: Demonstrate an ability to prepare general legal documents and forms.					
• Prepare legal memoranda and legal correspondence.	0	1	2	3	4
• Use correct case and statute citations.	0	1	2	3	4
• Differentiate among a General Power of Attorney, a Specific or Limited Power of Attorney, and a Springing Power of Attorney.	0	1	2	3	4
• Define a Letter or Certificate of Independent Legal Advice.	0	1	2	3	4
• Define and prepare a Conflict of Interest Agreement or Letter, an Affidavit of Execution, a Statutory Declaration, a Release, a Demand Letter, a Notarial Certificate, an Indemnity, a Waiver, a Notice of Meeting and Agenda, and a Closing Agenda.	0	1	2	3	4
• Describe alternative attestation clauses.	0	1	2	3	4
• Explain your rights and responsibilities as a Commissioner for Oaths and those of a Notary Public.	0	1	2	3	4
• Explain how to make "true" and "certified" copies, and "exhibit stamps".	0	1	2	3	4
TOTAL: _____ out of 164					

Add your responses and total your score. Compare your results with the scoring scale below to determine your likelihood of obtaining credit for this course through the RPL process.

Scoring Scale	
75% - 100% (123 – 164)	You are a good candidate to proceed with the RPL process. Please review this guide and discuss next steps with the course instructor or RRC RPL Advisor.
65% - 74% (107 – 122)	You may need additional prior learning to be successful in completing the RPL process for course credit recognition. Please discuss with the RRC RPL Advisor or the course instructor.
Less than 65% (0 – 106)	You are unlikely to be successful in completing the RPL process for course credit recognition. It is recommended that you enrol in the Legal Office Applications course.

RPL Assessment Process

You have completed and scored the Legal Office Applications course Self-Assessment Checklist. If you scored 75% or higher (123 to 164) on the Self-Assessment Checklist, you may consider demonstrating your prior learning for the Legal Office Applications course.

You may wish to discuss your Self-Assessment Checklist results with the course instructor or the RRC RPL Advisor. You may then decide whether to proceed with the RPL process or register for the course.

Outlined below are two (2) options for proving your prior learning.

You will need to select one (1) of the following assessment options:

Option 1:

If you have previously taken a course through a recognized post-secondary institution in this subject area, this may be considered for transfer credit. You must complete a **Transfer Credit Request** form and provide an **official transcript** and a **course outline**. The length of time since the course/program was taken will be a factor considered in the granting of credit. Please refer to RRC Policy A16, "Transfer of Credits to RRC Programs from Other Post-Secondary Institutions," for additional information.

Option 2:

You will provide written documentation which has been verified by your employer to demonstrate knowledge and skills for the learning outcomes of the Legal Office Applications course. You will also participate in a one-half hour to one hour telephone interview with the evaluating instructor.

Evidence Collection and Interview

For the **Evidence Collection**, you must have your supervisor(s) verify that it is work created or prepared by you (originally or using accepted precedents) by having them complete an authenticity statement in substantially the form attached to this package. (See **Appendix 2: Employer Verification of Authenticity of Evidence Collection.**)

General Office Documents

Please compile and label, as and in the order specified, and submit the following:

1. Two- or more- page business letter
2. One page interoffice memorandum
3. Notice of a Meeting with Agenda

4. Any template of a frequently used form (i.e., purchase order, invoice, requisition form, etc.)
5. Any other document demonstrating general office skills of your choice.

See Appendix 1 Evaluation Rubric for Evidence Collection for a detailed marking guide.

Law Office Documents

Please compile and label, as and in the order specified, and submit the following:

1. A private firm or Legal Aid Statement of Account
2. A Retainer Agreement / Letter or a Conflict of Interest Letter
3. An Affidavit of Execution of any document
4. A Statutory Declaration relating to any applicable subject
5. A Notarial Certificate of any document
6. A legal memorandum (of any length) containing statute and case citations
7. Any one of a Release, an Indemnity, or a Waiver
8. Any template of a frequently used form in a law office (i.e. cheque requisition, instructions to Land Titles Office or other government offices clerk, open or closed file report, etc.)
9. Any legal document in the area of law in which you have experience (i.e. a pleading, a Land Titles Office form, a closing agenda, a Companies Office form, etc.)
10. The first and last pages of any contract or agreement.

See Appendix 1 Evaluation Rubric for Evidence Collection for a detailed marking guide.

Confidentiality

It is appreciated that the work performed in a law office is confidential. In providing samples of existing work, names and other identifying information may be blackened out, unless to do so would result in an incomplete or incomprehensible document. In such cases, the student should produce a sample with names and identifying information left blank or one created using fictional names and information.

Interview (Telephone)

At a time mutually agreeable to you and our evaluating instructor, you will have a one-half hour to one hour telephone interview during which our evaluating instructor will ask

you questions relevant to the Course Learning Outcomes. The instructor will ask you to describe your particular work environment and to describe certain routine procedures and practices relating to your work. You will be evaluated on both the content and presentation of your answers.

See Appendix 1 Evaluation Rubric for Evidence Collection for a detailed marking guide.

Employer Verification

You must submit a letter(s), in substantially the form **Appendix 2: Employer Verification of Authenticity of Evidence Collection** from a lawyer(s) with whom you have worked or are currently working, attesting to the fact that the 10 items listed under **Evidence Collection** were prepared by you and meet that lawyer's(s') or law firm's standards for format, style and content.

Submission of Evidence Collection

The evidence collection and verification documentation is to be submitted to Donna Sebastian, Red River College, E111 – 2055 Notre Dame Avenue, Winnipeg, Manitoba, R3H 0J9. You have a maximum of 90 days from the time of registration for this course challenge to submit the required documentation.

Evaluation of your Prior Learning

This section outlines how your prior learning will be evaluated.

To be successful in the RPL process, the student must obtain a **minimum grade of 70%** on the **Evaluation Rubric for Evidence Collection (Appendix 1)**. This is the “pass” grade for the Legal office Applications Course.

Equal weight is given to each document. The General Office documents are worth a total aggregate mark of 60. The Law Office documents are worth a total aggregate mark of 120. The Interview (Telephone) is worth a total mark of 10. Thus, to be successful in the course challenge, you must obtain a minimum aggregate mark of 133.

If the student is unsuccessful in this challenge, he or she may be required to enroll and take the course, if appropriate, or submit additional proof of learning as outlined by the evaluating instructor.

Please note: Upon successful completion of the RPL process, you will be notified of your results.

Please contact the RPL course instructor or RRC RPL Advisor for further information.

Next Steps

Now that you are confident in proceeding with the RPL process for the Legal Office Applications Course, it is time to apply for and complete the RPL process.

The rest of the RPL process for this course consists of the following steps:

- 1) Complete the “**Application for Portfolio and/or Challenge Process Assessment**” and the registration process (including payment for the RPL process) online, by phone, fax or in person through Student Services Centre at D101 – 2055 Notre Dame Avenue or P104 – 160 Princess Street. Please contact the College RPL Advisor at 632-3094 with any questions or for additional information.
- 2) Once you have committed to the dates for the RPL process, you are responsible for completing this by the agreed upon date. Failure to meet your obligation will result in denial of your RPL challenge, and you will not be given credit for this course. As per **College Policy A14 (RPL Policies and Procedures,**) challenge fees are non-refundable and non-transferable.
- 3) You will receive written notification of your RPL results. You can also check your student records on your *WebAdvisor* account to ensure that your results have been recorded.

Appendix 1

Evaluation Rubric for Evidence Collection

General Office Documents

			#1	#2	#3	#4	#5
Format	4	Contains proper title or heading, if applicable, acceptable font style and size, correct pagination, correct margins and spacing, appropriate paragraphs					
	3	Few errors in formatting, one element missing					
	2	Several errors in formatting, one or more elements missing					
	1	Several elements missing					
	0	Incorrect format used					
Content	4	Contains all necessary components; well-organized					
	3	Some problem(s) with content, one component missing					
	2	Several problems with content, one component missing					
	1	More than one component missing					
	0	Insufficient information for evaluation					
English	4	No errors in sentence structure, spelling, grammar, capitalization, punctuation, numbers, language choice					
	3	Few errors in some of the foregoing					
	2	Several errors in some of the foregoing					
	1	Several errors in most of the foregoing					
	0	More than 3 errors per page					
			TOTAL: _____ out of 60				

Evaluation Rubric for Evidence Collection

Law Office Documents

			#1	#2	#3	#4	#5	#6	#7	#8	#9	#10
Format	4	Contains proper title or heading, if applicable, acceptable font style and size, correct pagination, correct margins and spacing, appropriate paragraphs										
	3	Few errors in formatting, one element missing										
	2	Several errors in formatting, one or more elements missing										
	1	Several elements missing										
	0	Incorrect format used										
Content	4	Contains all necessary components; well-organized										
	3	Some problem(s) with content, one component missing										
	2	Several problems with content, one component missing										
	1	More than one component missing										
	0	Insufficient information for evaluation										
English	4	No errors in sentence structure, spelling, grammar, capitalization, punctuation, numbers, language choice										
	3	Few errors in some of the foregoing										
	2	Several errors in some of the foregoing										
	1	Several errors in most of the foregoing										
	0	More than 3 errors per page										
TOTAL: _____											out of 120	

Evaluation Rubric for Evidence Collection

Interview (Telephone)

Content	5	Questions were answered correctly (where applicable) and otherwise appropriately; descriptions were efficient and effective; asked appropriate questions; volunteered information; prepared to relay anecdotal information; demonstrated initiative and enthusiasm; answers and descriptions demonstrated the speaker possesses the skills and knowledge requisite for this Course	
	3	One or two of the questions were answered incorrectly or inappropriately; [<i>“and” or “or”</i>] the speaker did not understand one or more of the questions or requests; one or more of the descriptions was weak or failed to demonstrate understanding	
	1	More than two of questions were answered incorrectly; and/or more than two of the questions or requests were not understood; more than two of the descriptions was incorrect or incomplete and failed to demonstrate understanding	
	0	Insufficient information for evaluation	
Presentation	5	Interviewee demonstrated very good to excellent professional telephone techniques; made good first impression; made appropriate language choices; demonstrated excellent English skills, pronunciation and enunciation; very few hesitations; volume, modulation, tone and pace of interviewee’s voice very good to excellent	
	3	More than two weakness in one or more of the foregoing; several hesitations; repetitious or lengthy responses	
	1	Several elements weak or missing; several hesitations, interviewee apparently nervous; response presentation hindering appreciation of content	
	0	Insufficient information for evaluation	
TOTAL: _____			out of 10

Appendix 2

Employer Verification of Authenticity of Evidence Collection

Submitted to: Legal Assistant Program
BUSA-1106: Legal Office Applications
Red River College

Submitted by:

Name:

Complete Address:

Telephone Number(s):

Fax Number:

Email Address:

I, _____, verify that the documents contained in the Evidence Collection are authentic (or true copies of authentic documents or fictionalized reproductions of authentic documents) and were created or prepared by _____ and meet my (or my firm's) standards for format, content, and style.

Date:

Signature: