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SAULT COLLEGE OF APPLIED ARTS & TECHNOLOGY
SAULT STE. MARIE, ONTARIO

COURSE OUTLINE

Course Outline: LEGAL OFFICE PROCEDURES I
Code No.: OPL 200
Program: LEGAL SECRETARIAL
Semester: II
Date: December 1984
Author: Rose Caicco

New

Revision

APPROVED

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Legal Office Procedures I

OPL 200

Course Name

Course Number

Prerequisites to OPL 100 are TYP 110 and OPC 100

REQUIRED TEXTS Procedures for the Legal Secretary - Revised Edition, flsise Schwartz

Workbook and papers for the above

101000 Legal Words, Kurtz et al

Perpetual Desk Diary or equivalent

Webster Dictionary or equivalent

SUPPLIES REQUIRED; - Typing Paper - letter size and legal size
 - Conveyancing Paper
 - Duo Tangs - 8 1/2 x 14
 - Legal package

Students will complete the attached objectives in accordance with the requirement specified and in addition, the following must also be completed;

- attendance at the Court House to witness court procedures as arranged by the instructor
- the instructor will arrange for the attendance of guest speakers at times and dates to be announced
- tours and field trips which will be arranged by the instructor from time to time

N.B. - field trips and guest speakers are arranged to supplement classroom activities. Attendance is mandatory. Absence, without prior notice or just cause, will result in the loss of 10% of the total semester mark.

Semester II (cont'd)

A precedent binder will contain at least one perfect copy of all major documents taken up during the course of the year. IT CANNOT BE STRESSED ENOUGH THAT THE STUDENT RETYPE DOCUMENTS AS THEY ARE HANDED BACK BY THE INSTRUCTOR. The Binder is collected at the end of the semester and a grade is assigned at that time.
Binder due date: May 8, 1985

The student will hand all work in neatly in a file folder, properly labelled.

GENERAL OBJECTIVES

- To make the student aware of the Legal Secretary and the various office duties.
- To indoctrinate the student in phases of law such as corporation, wills and estates.
- To give the student the opportunity to develop a general knowledge of law and of WHY things are done, in addition to HOW they are done.
- To improve the student's grammar, English usage and legal vocabulary.
- To develop the student into a competent legal assistant.

STUDENT EVALUATION

- Typing Speed
- based on three highest five-minute timings
 - determination of speed is by traditional 10-stroke (per error) count
 - student must reach a gross typing speed of 45 w.p.m. by the end of Semester II with an accuracy level of 98% on three five minute timed writings.

STUDENT EVALUATION (cont'd)

Remedial drills will be assigned as required to ensure *the* student achieves the speed and accuracy requirements as outlined below:

ASSIGSTMENTS;

- 100% completion of all assignments is expected with a passing grade in all assignments.. **DAILY ASSIGNMENTS NOT SUBMITTED BY DUE DATE WILL RESULT IN THE LOSS OF 10 MARKS PER ASSIGNMENT FROM THE TOTAL SEMESTER HARK, UNLESS THE INSTRUCTOR IS AWARE OF A VALID REASON BEFOREHAND.**
- Mailability or usability will be required in all document preparation and correspondence.
- Anything which is unacceptable will be rejected and handed back to the student for reassignment.

- Errors include:
 - a) misspelled words
 - b) punctuation errors
 - c) unacceptable erasures
 - d) incomplete documents
 - e) unsatisfactory preparation of documents
 - f) proofreading errors
- Depending on the severity of the error(s) work will be graded satisfactory or incomplete.
- An example of a major error in an assignment which will result in an "I" is the reversal of parties in documents, i.e., plaintiff and defendant, mortgagor and mortgagee, etc.
- Another example of a major error is insertion of an improper legal description or mortgage repayment clause.
- Any combination of errors mentioned in (a) to (f) stated earlier in this section, could result in an "I".

Semester II (cont'd)

ASSIGNMENTS (cont'd)

- The numerical equivalents corresponding to an alphabetical grade are as follows:
 - 85% - 100% = A
 - 70% - 84% = B
 - 60% - 69% = C
 - 0% - 59% = Repeat

FINAL GRADE:

The final mark in the course will be determined by tests as outlined in the following pages, binders, typing speed and diaries.

SEMESTER III AND	Tests	- 80%
	Binder	- 10%
	Diary	- 5%
	Typing Speed	- 5%
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- Other Considerations:
- outside assignments
 - attendance
 - ability to follow instructions
 - good work habits
 - personable office type characteristics

SCHEDULE FOR LEGAL OFFICE PROCEDURES I

Semester II

<u>DATE (APPROX,)</u>	<u>OBJECTIVE</u>	<u>TOPIC</u>
Jan. 25 - Feb. 15 (3 weeks)	1 - 4	Introduction to preparing legal correspondence
Feb. 18 - Mar. 8 (3 weeks)	5 - 8	Introduction to preparing general legal documents; Part I, i.e. agreements, contracts etc.
Mar, 11 - Mar. 29 (3 weeks)	9 - 11	Introduction to preparing general legal documents, Part II, i.e. statutory declarations, notarial certificates, etc.
Apr. 1 - Apr. 12 (2 weeks)	12 - 13	Introduction to Divorce Proceedings & Legal Aid
Apr. 15 - Apr, 26 (2 weeks)	14 - 16	Wills
Apr. 29 - May 24 (4 weeks)	17 - 18	Incorporations

Each "week" refers to 5, 50 minute periods.

NOTES STUDENTS WILL NOT BE ALLOWED INTO CLASS WITHOUT ALL REQUIRED TEXTS AND MATERIALS.

OBJECTIVE I - THE LEGAL SECRETARY

OBJKCTXVKi The student will understand and learn to use the Canadian Law List, the City Directory and the Postal Code Directory.

APPLICATION

1. Read pages 1 - 8 of text
2. Complete pages 1 - 10 of workbook
3. Handout to be distributed by instructor

EVALOATIOH: All work to be grade "S" or "I"

**EST MATED TIME
TO COMPLETE;** 4 periods of 50 minutes each

OBJECTIVE 2 - INTRODUCTION TO LEGAL CORRESPONDENCE

OBJKCTXVE: The student will learn how to set up properly and neatly, inside address, salutations, complimentary closings and special notations.
The student will type short letters and apply proper rules.

APPLICATI Mrs 1. Read pages 9 - 41 of text
2. Complete pages 21 - 26 of workbook

KVALPATIOH; All work to be graded "S" or "I"

ESTIMATED TIME
TO COMPIETE; 3 periods of 50 minutes each

OBJECTIVE 3 - LEGAL CORRESPONDENCE

OBJECTIVE: The student will set up longer letters from revised copy applying the rules studied in Objective 2.

APPLICATIONS Complete pages 27-30 of workbook

EVALUATION; All work to be graded "S" or "I"

ESTIMATED TIME

TO COMPLETE; 5 periods of 50 minutes each

OBJECTIVE 4 - TEST NO. I

OBJECTIVES The student will complete a test from unpreviewed material.

APPLICATIOCTB: Test is based on Objectives 1, 2 and 3 (Legal Correspondence)

EVAI.D&TIOMf; All work to be graded "A", "B" , "C" , or "I"

ESTIMATED TIBC:
TO COMPIETE; 2 periods of 50 minutes each

OBJECTIVE 5 - INTRODUCTION TO PREPARING LEGAL PAPERS

OBJECTIVE: The student will learn how to properly set up headings on legal documents and will become further acquainted with the Canadian Law List as well as the Ontario Municipal Directory.

The student will learn how to properly set up the body of a printed legal document.

The student will learn the typing principles of fully typed legal documents.

The student will learn the proper endings for various legal documents and also how to prepare backs for same

- APPLICATIONS
1. Read pages 79 - 101 of text
 2. Complete pages 81 - 86 of workbook

Note: Townships of York, Etobicoke, etc., in Toronto area are now BOROUGHS of York, Etobicoke, etc.

EVALUATION: All work to be graded "S" or "I"

ESTIMATED TIME TO COMPLETE: 5 periods of 50 minutes each

OBJECTIVE 6 -GENERAL AGREEMENT

OBJECTIVES	The student will prepare a general agreement, in triplicate, following the typing principles studied in Objective 5.
APPLICATION	1. Complete item 'A', page 87 of workbook <u>Note;</u> Use conveyancing paper for all but file copy-
EVALUATION	All work to be graded "S" or "I"
<u>ESTIMATED TIME TO COMPLETE;</u>	4 periods of 50 minutes each

OBJECTIVE 7 - MARRIAGE CONTRACT

OBJECTIVE: The student will prepare a contract using short paper.

APPI.ICATION: 1, Complete page 90, Item 'B'
2, Complete page 91, Item 'E'
3, Complete page 93, Item 'F' in original only

EVALUATION All work will be graded "S" or "I"

ESTIMRTED TIME
TO COMPLETE: 4 periods of 50 minutes each

OBJECTIVE 8 - TEST NO. 2

OBJKCirXVK: The student will complete a test from unpreviewed material.

AFPtllCA.TIO]lff: Test is based on Objectives 5 - 7
(General Legal Documents)

EVAL.I]&TIC>I: All work to be graded "A", "B", "C" or "I

ESTIMATED TIME
TO COMPLKTE: 2 periods of 50 minutes each



OBJECTIVE 9 - REUSASE, NOTARIAL CERTIFICATES AND STATOTORY DECLARATIONS

OBJECTIVE:

The student will prepare a general release in accordance with legal typing principles.

The student will prepare a Statutory Declaration and a Notarial Certificate of True Copy on printed forms.

The student will prepare a Notarial Certificate of True Copy in accordance with legal typing principles.

APPLICATION:

1. Read pages 102 -111

2. Complete page 97-A, 99-A, and 101-D of workbook

Note: Error on page 101 of workbook. No. 3 should refer to PLSA 11 and not PLSA 12.

EVAUJATZCH:

All work to be graded "S" or "I"

**ESTIMATED TIME
TO COMPLETE:**

6 periods of 50 minutes each

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OBJECTIVE 10 - POWER OF ATTORNEY & GEMOERAL OR SOPPORTIMG AFFIDAVITS

OBJECTIVE The student will complete Affidavits of Subscribing
Witness and Affidavits of Legal Age and Spousal Status

 The student will complete a Power of Attorney in
accordance with legal typing principles.

APPLICATION 1. ^ Study pages 147 - 154 of text

 2. Complete pages 100 C (No. 1 and 3)
 104 & 105

EVALUATIONS All work to be graded "S" or "I"

ESTIMAGED TIME
TO COMFUSXZ: 5 periods of 50 minutes each

NOTE; Page 104 of text (Affidavit of Legal Age & Spousal Status)
with respect to property ownership is incorrect. The law
states that someone can own property if under 18, however,
they cannot sell unless a) they are over 18 or
 b) a female spouse (a male spouse
 under 18 cannot sell property)

OBJECTIVE 11 - TEST NO. 3

OBJECTIVE: The student will complete a test from unreviewed material.

APPLICATION: Test is based on objectives 9 and 10
(General Legal Documents)

EVALUATION: All work to be graded "A", "B", "C", or "I"

ESTIMATED TIME
TO COMPLETE: 2 periods of 50 minutes each

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OBJECTIVE 12 - DIVORCE PROCEEDINGS

OBJECTIVE: The student will complete a Separation Agreement, a Petition for Divorce, and a Notice of Petition for Divorce in accordance with legal typing principles.

APPLICATIONS

1. Read pages 522 - 528 of text
2. Complete page 323 - Domestic Contract
" 325 - Petition for Divorce

Note; Page 333 - Add "Official Guardian" as item "Q" to be defined.

EVALUATION

All work to be graded "S" or "I"

ESTIMATED TIME
TO COMPLETE:

5 periods of 50 minutes each

OBJECTIVE 13 - LEGAL AID

OBJECTIVE: The student will complete a Solicitor's Legal Aid Report (Form 10)

The student will understand and prepare an account ready for submission to the correct offices to accompany the said Form 10.

The student will complete an account for Duty Counsel in a Civil Matter in accordance with the Legal Aid Act.

APPLICATION: This objective is not in the workbook and a handout will be distributed by the instructor

WRPDJOLTZOS: All work to be graded "S" or "I"

ESTIMATED TIME
TO COMPLETE: 5 periods of 50 minutes each

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OBJECTIVE 14 - WILL CLAUSES

OBJECTIVE: The student will understand basically some of the more common will clauses that are used in the preparation of a common will, i.e. opening clause debts, duties and taxes clause; infants clause; investment clause; and others.

The student will prepare a short will on proper will paper in accordance with proper legal typing principles-

APPLICATIONr

1. Study pages 394 - 405 of text
2. Page 267 - G
Page 268 & 269 - Clauses 1-6
Page 272 - B only
3. Complete Affidavit of Execution of Will

EVALUATION

All worX to be graded "S" or "I

ESTIMATED TIME
TO COMPIETE:

4 periods of 50 minutes each

OBJECTIVE 15 - WILLS

OBJECTIVES The student will prepare a simple longer will using the clauses studied in Objective 14 .

The student will learn how a will is executed in proper form.

APPLICATIONS Complete page 272 - C & D
 " . 275
 " 2 76

EVALUATION: Student will be graded "S" or "I

ESTIMATED TIME
TO COMPLETE: 4 periods of 50 minutes each

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OBJECTIVE 16 - TEST NO- 4

OBJECTIVE: The student will complete a test from unpreviewed material -

APPLICATIONS: Test is based on Objectives 12 - 15
(General Legal Documents)

EVALUATIONS: All work to be graded "A", "B", "C" or "I"

ESTIMATED TIME
TO COMPLETE; 2 periods of 50 minutes each

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OBJECTIVE 17 INCORPORATING AN ONTARIO CORPORATION

OBJECTIVE: The student will prepare Articles of Incorporation in accordance with legal typing principles and The Business Corporation Act.
*The student will prepare a simple By-Law in accordance with legal typing principles.

APPLICATION: Read pages 448 - 492
Complete page 297 - A
302
303
304 - F

EVALUATION All work to be graded "S" or "I"

ESTIMATED TIME
TO COMPLETE: 8 periods of 50 minutes each

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OBJECTIVE 18 - CORPORATE MEETINGS, MINUTES AND RESOLUTIONS

OBJECTIVE: The student will prepare Resolutions and Minutes of an Annual Meeting, a Board of Directors and a Shareholders Meeting.

APPLICATION: Read pages 493 - 509
Complete page 305 A&B

SSfMJJTXaSz All work to be graded "S" or "I"

ESTIMATED TIME
TO COMPLETE: 8 periods of 50 minutes each

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