

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

COURSE OUTLINE

Course Outline: LEGAL OFFICE PROCEDURES

Code No.: OPL 400

Program OFFICE ADMINISTRATION - LEGAL

Semester: FOUR

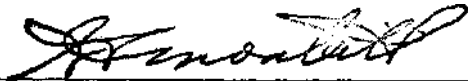
Date: JANUARY, 1987

Author: ROSE CAICCO

New:

Revision: X

APPROVED

  
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Chairperson

Date

LEGAL OFFICE PROCEDURES

Prerequisites to OPL 300 IS OPL 200  
Prerequisite to OPL 300 IS OPL 400

REQUIRED TEXTS; NOIE; Text is not in print until November. The instructor will give handouts in lieu of a text until that time.

- 10,000 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  
-12 file folders, file labels & carbon paper

NOTES STUCranS WILL NOT BE ALEOWa> INTO CLASS WITHOUT ALL PBQOIRD TEXTS AND MATERIALS

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 part of trial 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 quest 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 cumulative semester mark.

## LEGAL OFFICE PROCEDURES

- One precedent binder for each semester which 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 binders are collected at the end of each semester and a grade is assigned at that time.

Binder #2 due November 28, 1986

Binder #3 due April 10, 1987

A list of the minimum requirements for each of these binders is attached to the beginning of the objectives together with a suggested marking scheme.

- 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 real estate, corpotation, wills, estates and civil litigation.
- 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 cotpetent legal assistant-

### STOIENT EVALUATION

#### Typing Speed

- ^Based on three highest five-minute timings
- Student must reach a typing speed of 50 gross words per minute by the end of Semester III and 60 gross words per minute by the end of Sanester IV with an accuracy level of 98% on five minute time writings.

LEGAL OFFICE PROCEDURES

STUDENT EVALUATION (continued)

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

- Assignments:
- 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 MARK.
  - 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
  - Marks will be deducted for any work handed in late unless the instructor is aware of a valid reason beforehand.
  - 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 payment clause.
  - Any combination of errors mentioned in (a) to (f) stated earlier in this section, could result in an "I".

Any work handed back with an "I" grade must be resubmitted one week after the instructor has returned it or it will be considered late and have the penalty as previously stated.

LEGAL OFFICE PROCEDURES

-^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 both Semester III and Semester IV will be determined by tests as outlined in the following pages, binders, typing speed, and diaries.

SEMESTER III AND IV

Tests	-	75%
Quizzes (Unannounced)	-	5%
Binder	-	10%
Diary	-	5%
Typing Speed	-	5%
		100%

SCHEDULE FOR  
LEGAL OFFICE PROCEDURES

Semester IV

<u>Date (appr.)</u>	<u>Objectives</u>	<u>Topic</u>
Jan. 5 - Jan. 30 (4 weeks)	64 - 67	Introduction to Real Estate
Feb. 2 - Feb. 20 (3 weeks)	68 - 70	Mortgages, Charges, Repayment privileges
<b>fffl. 23 - 27 - WINTER SEMESTER BREAK</b>		
Mar. 2 - Mar. 10 (1 week)	71	Discharges & Cessations (including assignments and partial discharges)
Mar. 11 - April 15 (5 weeks)	72 - 76	Vendor & Purchaser transactions (including reporting out)
April 16 - April 24 (1 week)	77	Mortgage transaction
April 25 - May 1	78 - 79	House lease. Chattel Mortgage, Financing Change Statement

**CON7XATIGN - SATORDAY, MAY 9, 1987**

NOTE: "Week" above refers to 6, 50 minute periods per week,

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**CBJBCnVE 66 - EEED WrraODT SFOOSAL OOKSOrr\***

OBJExriVE: The student will understand the meaning of spousal consent.

The student will complete two deeds without spousal consent in proper legal form, ready for registration in the Registry Office,

APPLICATION!

1. Read pages 159-174 of text
- 2, Complete pages 131, 135, 139 E and G only, 140 and 141 of workbook
3. Prepare Affidavits of Value of Consideration, rem^nbering that these are not inserted in deeds. Prepare in triplicate.

EVALUATION:

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

ESTIMATED TIME TO  
COMPLETE:

5 periods of 50 minutes each



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**OBJBCnVE 67 - DEBPWrm SPODSRL OONSBH**  
**- TRANSFER (LAND TTTiis ACT)**

OBJECTIVE: The student will prepare a deed with spousal consent in accordance with The Registry Act and in accordance with legal typing principles

The student will prepare a land transfer under The Land Titles Act in accordance with legal typing principles.

**PREPARE IN TRIFCJCAIE**

APPLICATION: Corrrplete pages 133 and 137

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

ESTIMATED TIME TO  
COMPLETE: 4 periods of 50 minutes each

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Deeds/Transfers

OBJECTIVE;                      The student will complete and pass a test of unpreviewed material.

APPLICATION:                      Test is based on objectives 64 to 67

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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**CBJBCnVE 68 - REPAYMENT OAJ^S**

OBJECTIVE: The student will understand the most common repayment clauses that he/she will encounter in a legal office with particular emphasis being put on the amortized clause and the blended payment clause.

APPLICATION: 1, Read pages 186-212 of text  
2. Complete pages 153-158 of workbook

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

ESTIMATED TIME TO  
COMPLETE: 4 periods of 50 minutes each

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**CBJBCnVE 69 - HSREGfGE AND CHVHGE WIEHOOT SFGOSAL GONSQIT**

OBJECTIVE: The student will prepare a mortgage and a Charge without spousal consent and will also be able to select the proper repayment clause for each document together.

APPLICATiaa: 1. CoiTplete pages 159 and 162 of workbook

- NOTE:
- a) change payments to \$375,00 monthly (blended) on page 162. All other terms remain the same. A handout, to be used as a guide will be handed out by the instructor. (East and Vfcodworth)
  - b) printing error in description - use "Unit 15, Level 3".
  - c) Change closing date on Hartwood and Harvey agreement of purchase and sale to the 2nd day of April-

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

ESTIMATED TIME TO COMPLETE: 5 periods of 50 minutes each

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TEST NO. 7

Mortgages/Charges

OBJECTIVE;

The student will complete and pass a test on unreviewed material.

APPLICATION;

Test to be based on objectives 68-70

;aiworKtobegraded 'A', 'B<', 'C<<', or <I

EVALUATION!

ESTIMATED TIME TO COMPLETE;

2 periods of 50 minutes each

CB3BCTIVE 71 \* a) Discharge of Mortgage  
b) Discharge of Assignmant of Mortgage  
c) Partial Discharge of Mortgage

OBJECTIVE:

The student will understand the meaning of a discharge of mortgager a discharge of mortgage and subsequent assignment and a partial discharge of mortgage.

The student will be able to complete each of the above in accordance with legal typing principles.

APPLICATION:

1. Study pages 237-238 of text
2. Complete page 187  
Complete page 189 (D only)
3. Complete handout to be distributed by instructor for a partial discharge of mortgage

MOTE: For Anderson/Peterson Balloil documentr use the following registration particulars:  
Reg. Dec, 17/80 at 11:25 a.m. as  
No. T-359072

EVALUATION;

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

ESTIMATED TIME TO COMPLETE:

4 periods of 50 minutes each

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**OBJECTIVE 72 - CESSATION OF CHARGE**

OBJECTIVE:

The student will understand the meaning of a Cessation of Charge under the Land Titles Act,

The student will be able to complete a Cessation of Charge in accordance with legal typing principles.

APPLICATION;

!• Study pages 132-134 of text

2- Ccsnplete page 189E and 189F of workbook

NOTE: - There is an error in the wDrkbook.  
Get all the required information from the charge in the textbook.

- Use July 3 as date of charge

EVALUATION:

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

ESTIMATED TIME TO  
CCOMPLETE:

2 periods of 50 minutes each



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1. Prepare a partial discharge of mortgage as follows:

**WxtgagcxsZ** Sandra McPherson and Mathew McPherson of the City of Sault Ste. Marie in the District of Algoma.

**Original Mortgagees!** The Lumber Manufacturing Canpany, a cotipany incorporated under the laws of the Province of Ontario and having its Head Office at the City of Sault Ste, Marie in the District of Algoma.

**Registration Particulars:** Mortgage is dated the 14th day of July, 1967, registered 25th day of July, 1967, in the Registry Office for the Registry Division of Algoma at 2:05 p.m. as instrument number T-73865,

**Assignment Particulars;** Assignment is dated the 19th day of February, 1971, registered the 13th day of March, 1971, as instrument number T-85421, at 10:15 a.m. to Philip Mount and Anna Mount of Sault Ste. Marie.

**Property Mortgaged:** The whole of lots 1 to 20, both inclusive, in the Chipnan Subdivision according to a plan thereof registered in the Registry Office for the Registry Division of Algoma as Number H-456.

**Property Being Discdiarged:** The whole of lot 15 of the above mortgaged property,

**Consideration:** \$500.00

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**ADDITIONAL ASSIGNMENTS RE DISCHARGES (cont'd)**

2. Prepare a discharge of mortgage and its assignment as follows:

Particulars of original mortgage:

**Mortgagors:** Edith Foster and John Foster of the City of Sault Ste. Marie in the District of Algoma.

**Original Mortgagees:** Frank Borden and Maxine Borden of the City of Sault Ste. Marie in the District of Algoma.

**Registration Particulars:** Mortgage dated February 5, 1970 and registered in the Registry Office for the Registry Division of Algoma on the 8th day of February, 1970, at 2:15 p.m. as instrument number T-58979.

**Property;** Lot 22, Terrance Subdivision, Plan H-819.

**Particulars of Assignment:**

# **New Mortgagees** Samuel F. Davis and Karen Davis of the City of Sault Ste. Marie in the District of Algoma, mortgage dated and registered the 14th day of March, 1972, as instrument number T-78965. The time of registration was 10:30 a.m.

The duplicate registered copy of the above mortgage has been lost

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**TEST NO. 9**

OBJECTIVE: The student will complete and pass a test on unpreviewed material.

APPLICATION: Test to be based on objectives 71 and 72 (Discharge & Cessations)

EVAUJATION: All work to be graded 'A', 'B\ 'C or 'I\*

ESTIMATED TIME TO COMPLETE: 2 periods of 50 minutes each

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**CBJBCnVE 73 - SIKTB/iSSr OF ADJUSTMENTS**

**OBJECTIVE:**

The student will be able to complete a statement of adjustments setting out the purchase price, the deposit, any adjustments for fire insurance, taxes, local improvement charges, mortgages, rental, utilities, or any other adjustments which the instructor may feel are related to a statement of adjustments.

The student will be able to prepare an undertaking for readjustments in transactions when one is necessary.

**APPLICATION:**

1. Study pages 213-217 in text
- 2, Complete pages 173-178 of workbook

N.B.: Change closing date on Hartwood and Harvey Agreement of Purchase and Sale from the "1st of the next month" to the "2nd day of April" (page 149 of workbook).

Also, check per diem rate on mortgage statement. Should read \$11.27 per day, not \$4.18.

**EVALUATION:**

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

ESTIMATED TIME TO  
COMPLETE:

6 periods of 50 minutes each



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**TEST NO. 10**

Vendor Transaction

OBJECTIVE: The student will complete and pass a test of unpreviewed material.

APPLICATION: Test will be based on objectives 73 and 74

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

ESTIMATED TIME TO  
COMPLb'i'E: 2 periods of 50 minutes each

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**QBJBCnVE 75 - ACTING FOR THE W9CBPSEBL**

OBJECTIVE: The student will be able to prepare all the necessary documents and letters which will be required in a simple purchase transaction, including ordering a search of title, mortgage documents (if applicable), ordering of tax certificates and any other certificates or relevant material.

APPLICATION;

1. Read pages 126-131 of text
2. Re-type contract on page 149
3. Complete page 148
4. Complete all necessary documentation for Hartwood p.f. Harvey contract as shown on page 149 of workbook

NOTE: Fees as follows:

- Tax Certificate - \$10-00 per lot
- Certificate of Conformity:
  - \$20.00 in Toronto
  - \$5.00 in Sault Ste. Marie

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

ESTIMATED TIME TO  
COMPLETE: 7 periods of 50 minutes each

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OBOBCmVB 76 - BEaPQRTBiG LETTERS

OBJECTIVE'.

The student will prepare a complete reporting letter to the vendor and also to the purchaser and will understand the meaning of a certificate of title. The student will also prepare the necessary account and trust statementr together with any insurance transfers.

APPLICATION!

1- Cortiplete page 179

NOTE: Item D of page 179 refers to Bell's sale to Little, adapt this letter to report out on Howard sale to Scott (refer to page 233 of text)

For an example of a purchaser's reporting letter, refer to page 229-232 of text and do report on Hartwood p.f. Harvey.

EVALUATION:

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

ESTIMATED TIME TO  
COMPLETE:

6 periods of 50 minutes each

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**TEST NO. 11**

OBJECTIVE: The student will complete and pass a test based on unpreviewed material.

APPLICATION: Test is based on objective 75 (Purchase Transaction)

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

ESTIMATED TIME TO  
COIPLETE: 2 periods of 50 minutes each

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**GBJBCnVB 77 \* ACTING FOR THE NORTGMSE**

OBJECTIVE: The student will complete all the documents and correspondence related to an actual application for a mortgage loan from the time it reaches the solicitor's office to the final report on title to the mortgages\*

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

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

ESTIMATED TIME TO  
COMPLETE: 6 periods of 50 minutes each

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CBJBCnVE 78 - HOUSE LEASE

OBJECTIVE: The student will understand the purpose of a lease and in particular, a house lease. The student will be able to calculate payment dates under a lease and will become familiar with some of the legal terminology.

APPLICATION:

- 1, Study pages 258-264
- 2, Complete page 197 (A) only of workbook
- 3, Complete page 200 of workbook

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

ESTIMATED TIME TO  
COMPLETE: 2 periods of 50 minutes each

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CBJBCnVE 79 \* CHKTTEL NORVGAGE

OBJECTIVE: The student will understand the meaning of a Chattel Mortgage and the required supporting affidavits. The student will also understand a Financing Change Statement and will be able to complete this accurately.

APPLICATION! This objective is not in the workbook and a handout will be distributed by the instructor.  
Study page 184 of text.

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

ESTIMATED TIME TO  
COMPLETE: 3 periods of 50 minutes each

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