

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

COURSE OUTLINE

Course Outline LEGAL OFFICE PROCEDURES I
Code No. : OPL 200
Program: OFFICE ADMINISTRATION -- LEGAL
Semester: II
Date: JANUARY, 1988
Author: Rose Caicco

New:

Revision:

APPROVED:


Ch2i
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Date

Legal Office Procedures I

OPL 200

Course Name

Course Number

Prerequisite to OPL 100 is OPC 100

- REQUIRED TEXTS:**
- Legal Office Procedures, T. Kamakaris
 - Simulations for above
 - 10,000 Legal Words, Kurtz et al
 - Perpetual Desk Diary or equivalent
 - Webster Dictionary or equivalent

- SUPPLIES REQUIRED:**
- Typing Paper
 - 3" X 5" file box or binder to be used for filing system

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. **Absencer without prior notice or just cause, will result in the loss of 10% of the cumulative semester mark***

Semester II (cont'd)

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.

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 PERCENT PER ASSIGNMENT.**

NOTE:

Daily work will be graded "mailable" or "unmailable". Throughout the semester, the instructor will randomly select 15 separate pieces of work. Each will be graded "M" or "U" and 10 will count towards the final grade. Since the objective of all office work is mailability, this will be determined by the following error-deduction scheme:

- 5 each incorrect spelling, proofreading error
- 2 all other errors
- 1/2 or -5 for punctuation (Ex. -1/2 for comma;
- 5 no end of sentence punctuation)
- 2 minor format errors
- 5 major format errors

Any mailable items must receive at least 6 out of 10.

Ex.

If a student has 9 out of 10 "mailable" pieces, the mark earned would be 90% which means that 90% of the work submitted was 100% mailable.

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: **April 15, 1988.**

The penalty for handing the binder in late is 10% per day.

SAMPLE MARKING SCHEME FOR BINDER:

Proofreading and spelling:	5 each occurrence
Minor format errors:	2 each occurrence
Major format errors:	5 each occurrence
Missing documents and/or affidavits:	5 each occurrence
Missing legal seals:	2 each occurrence
Poor corrections:	2 each occurrence
No letterhead:	2 each occurrence
-10% penalty for <u>each day</u> late	

Ten percent of the grade for the binder will be assigned to presentation i.e. neatness, completeness, originality, etc.

FINAL GRADE:

The final mark will be determined as outlined in the following pages, plus the following:

Tests	65% *
Daily Work	15%
Binder	10% **
Diary	5%
Quizzes (not announced)	5%
	100%

* Test schedule attached

** Minimum requirements attached

NOTE:

If a student is not able to write a test because of illness, or a legitimate emergency, that student must contact the instructor prior to the test and provide an explanation which is acceptable to the instructor (medical certificates or other appropriate proof may be required). In cases where the student has contacted the instructor^ and where the reason is not classified as an emergency, i.e. slept in, forgot, etc. the highest achievable grade is a "C". In cases where the student has not contacted the instructor, the student will receive a mark of "0" on that test.

THERE WILL BE NO RE-WRITES OF TESTS OR QUIZZES,

NOTE:

Students will not be allowed into class without all the required texts.

* TESTS

No. 1	Based on Simulation	1 - 6
No. 2	Based on Simulation	7 & 8
No. 3	Based on Simulation	9 & 12
No. 4	Based on Simulation	13 & 14

Tests will be announced one week in advance. Theory and vocabulary will be a part of most tests.

Time allowed will be two periods of 50 minutes each.

**** MINIMUM REQUIREMENTS - BINDER NO. 1**

SIMULATION	5	- Accounts
	6	- Legal Aid - All Simulations
	7 & 8	- Correspondence - 1 short - 1 two page
	9 & 10	- Memo of Law - 1 short - 1 long
	11 - 14	- All of these Simulations

SIMULATION NO. 1 - THE CONTEMPORARY LAW OFFICE

OBJECTIVE: The student will study the work environment of the law office/ including skill requirements and information processing.

APPLICATION Read chapter 1 and complete review questions in preparation for class lecture.

Complete simulation numbers 1.1
1.2
1.5

ESTIMATED TIME TO COMPLETE: Three periods of 50 minutes each

**SIMULATION NO. 2 - TELEPHONE ETIQUETTE
- FILING SYSTEMS**

OBJECTIVE:

The student will be made aware of ways to properly screen calls and be given examples of how to handle difficult clients.

The student will also be introduced to legal filing systems -

APPLICATION

1. Read chapter 2

2, Complete simulation numbers 2.1

2.2

2.3

2.4

2.6 A & B*

2.7 **

* For this part of the simulation, you may use an index box, as suggested, or a small binder (3" x 5" or larger) with a separate page for each file.

**Use your perpetual diary to make note of these items.

**ESTIMATED TIME
TO COMPLETE:**

Three periods of 50 minutes each.

SIMULATION NO. 3 - DIRECTORIES AND LAW BOOKS

OBJECTIVE: The student will be made aware of some of the legal directories i.e. Law Lists (Canadian and American), Almanacs, City Directoriesf etc. which are most commonly found in legal offices-

APPLICATION: Attached

ESTIMATED TIME TO COMPLETE: Two Hours

SIMULATION NO. 3 - DIRECTORIES AND LAW BOOKS

APPLICATION

1. You are new to the Sault and have been asked to give the name of a Legal firm which practices Law and can offer their services in French and another firm which offers services in Italian. Where would you find this information? Give the name of each Legal firm in full/ including its address and telephone number.
2. You took a telephone message but the caller hung up before you could get his name (he probably figured you recognized his voice). Mr. Redford prefers both a name and telephone number so he can be fully prepared to speak to a party prior to returning a call- The number you have is 949-1589. Find the name-
3. Mr. Redford wants to write to the owner of 175 Fort Creek Drive because he has a client who wants to buy that house. Find out who lives there.
4. You need to contact the owner of 712 Pine Street, Apt. 1. Who is it and what is the telephone number given.
5. Mr. Redford wants to contact manager of Proctor & Redfern Limited. Who is he/she? Where is their office. What do they do?
6. List one Legal firm from each province and include the address.
7. List three legal firms in the United States, complete with address.

**SIMULATION NO. 4 - INTRODUCTION TO LETTER STYLES USED
IN LEGAL OFFICES**

OBJECTIVE

The student will be introduced to styles used in legal offices with respect to addresses and in particular, the use of Q.C., Esq., Barrister and Solicitor, Messrs., etc., as well as complimentary closings.

.wV , /

APPLICATION

Handout to be distributed

**ESTIMATED TIME
TO COMPLETE:**

Four periods of 50 minutes each.

ENVELOPES, INSIDE ADDRESSES, SALUTATIONS AND SUBJECT LINES

1. You are writing a letter to the legal firm of Lakes, Rivers, and Ponds - Their mailing address is Suite 1002, 111 Richmond Street West, Toronto, Ontario- M5J 4Y2. This will be about your file, Berwick and Parker ats. Petron. Prepare up to the subject line.
2. You are sending a "Without Prejudice" letter to the legal firm of Armstrong and Bryan who are at 16 Mount Royal Blvd., Toronto, Ontario, M6K 112. This item will be for the attention of Mrs. R-B, Simpson and is in connection with the Rodgers purchase from Gray file. Prepare an envelope and the heading on a letter up to the subject line.
3. Write the address as it would appear on an envelope to Mrs. R.B. Alderson at 174 Prince Town Crescent, Sault Ste. Marie, Ontario, P6C 2J1. Mark the letter "Personal".
4. You have written a letter to the legal firm noted in No. 1 above and the following second page. Complete it as to form for signature by Mr. Redford on behalf of the firm. There was one enclosure mentioned in page one.

and trust that everything has been handled to your satisfaction. Should there be any problems or questions, please do not hesitate to contact us.

5. The following is the second page of a letter written to Albert C. Walker who is a Queen's Counsel. It is being sent by registered mail to 487 Albert Street East, Sault Ste. Marie, Ontario, P6A 7K9. Complete it for signature by Mr. Redford.

after I have had an opportunity to discuss the matter with our client. I would appreciate your telephoning the writer upon receipt of this letter in order to make final arrangements for closing-

6. You are writing to an all female legal firm of Marks and Greco who are at 138 Pinder Street, Toronto, Ontario, M8R 1K9, and is in connection with the Boston divorce. Prepare the heading up to and including the subject line.

SIMULATION NO. 5 - LEGAL ACCOUNTS

OBJECTIVE

The student will learn to prepare time sheets/
dockets, general and account ledgers, and
client accounts.

APPLICATION:

Refer to Chapter 2

Complete Simulation Numbers 2.9
2.10 (A, B, C)
2.14

Be sure to look up and understand use of
legal terminology such as ats, v/vs.,
disbursements, etc.

**ESTIMATED TIME
TO COMPLETE:**

5 Hours

SIMULATION NO. 6 - LEGAL AID

OBJECTIVE: The student will be given a brief overview of the Legal Aid program and will complete some of the documentation required to report out on a Legal Aid file*

APPLICATION Refer to Chapter 2 and complete review questions in preparation for class lecture

This simulation is not in the student materials and a handout will be distributed by the instructor-

ESTIMATED TIME TO COMPLETE: Five hours

SIMULATION NO. 7 - LEGAL BUSINESS COMMUNICATION

OBJECTIVE: The student will type legal business correspondence using the most common styles of letters and using special notations as are prevalent in legal offices.

APPLICATIONS: NOTE: Students requiring punctuation and capitalization review are referred to pages 40 - 50 of the text. However, it is not the instructor's intent to teach these- Any problems should be directed to your English instructor.

1. Read manual pages 50 - 60 (Chapter 3)
2. Do review questions 11 - 18 in preparation for class lecture.
3. Complete 3.12 A, B, C, & D

ESTIMATED TIME TO COMPLETE: Five Hours

SIMULATION NO. 8

OBJECTIVE: The student will prepare a variety of correspondence so as to familiarize him/herself with legal terminology i.e. - divorce, corporate, conveyancing, etc.

APPLICATION: 1. Refer to Chapter 3
Complete 3.13
3.14 A
3.15 A & B
3.16 A & B

ESTIMATED TIME
TO COMPLETE: Five hours

SIMULATION NO. 9

OBJECTIVE The student will be able to prepare legal memoranda in accordance with legal typing principles. This will involve use of citations, square and round brackets, etc.

APPLICATION Read Chapter 4 of the text and do review questions in preparation for class.

Complete simulations 4.1 and 4.2

ESTIMATED TIME
TO COMPLETE: Four hours

SIMULATION NO, 10

OBJECTIVE: The student will be able to prepare a more complex memorandum of law using proper legal typing principles.

APPLICATION Refer to chapter 4 for rules.
Complete 4.3 and 4.5

ESTIMATED TIME TO COMPLETE: Four hours

SIMULATION NO. 11 - BASIC FIELDS OF LAW

OBJECTIVE

The student will be introduced to the various fields of law and some of the general documents commonly found in those fields, i.e. directions, acknowledgments, authorizations, retainers, etc-

APPLICATION

Read Chapter 5 and do review questions in preparation for class.

Complete Simulation No. 5.1, 5.2, 5.3 and 5.4

**ESTIMATED TIME
TO COMPLETE:**

Five hours

SIMULATION NO. 12

OBJECTIVE	The student will complete statutory declarations (by a single and joint deponents), a notarial certificate, an affidavit of service, and a power of attorney.
APPLICATION	1, Refer to Chapter 5 2, Complete Simulation 5,5 and 5.7 3, Complete following 3 pages
ESTIMATED TIME TO COMPLETE:	Five hours

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3 n t!)e iWatter of a

power of attorney dated

PROVINCE OF ONTARIO

the 1st day of July (aurrent year) » from

. Caroline Rosalie Hardie to Ronald Craig Anderson

f OF

TO WIT:

I. LUCILLE CAROLINE ANDERSON^ if)



of the City of

in the ^7"n^y nf

DO SOLEMNLY DECLARE THAT

1. I reside at 94 Prince William Avenue, in the City of

2. The above-named CarolineAHardie is my mother, and the above-named

Ronald C/y^Tderson is my h

J' ^iM^ your city
July! (current year)

At the time of the execution of this power of Attorney/!my said mother was visi ting><at j^y s-a*4 residence^* On August 1 (ouvvent .r yeav) she went to Halifax, Nova Scotia, to visit # nephew^ and her present address is 1780 Queenston Street, Halifax^ yisih-^L^J^Za^

Since my mother went to Halifax she_ has written to me once or twice a week, and I have been writing regularly to her, A letter b-a* been received from her wtf^thin_-tAg pant week.' The4-r is no doubt that if my mother ^jd^re to die or even become seriously ill my oett*=FTr; with whom she is presently viaitfrf^, would notify me instantly. I have every reason to bel(e|i|ve that as of today my said mother is alive-y

S, *My, ^ .: ^ r^ ^ - - t^ - 5 ^ 1 ^ ^ ^ ; : : 1 ^*
... that she plans to return to ...
... u::JU^ jM .. ouif^with
%

AND I make this solemn Declaration conscientiously believing it to be true, and knowing that it is of the same force and effect as if made under oath, and by virtue of "The Canada Evidence Act."

fixed for closing of

POWER OF ATTORNEY

Lynda Ritchie is going to have serious surgery so she would like a general power of attorney in favour of her husband Paul. They both live in Sault Ste* Marie, Please prepare this for signing today. You will be the subscribing witness.

Thanks.

R. Redford

SIMULATION NO, 13 - FAMILY LAW

- OBJECTIVE** The student will prepare a separation agreement and a marriage contract in accordance with legal typing principles.
- APPLICATIONS:** Read Chapter 13 and complete review questions in preparation for class.
- 2, Complete Simulation 13.1 and 13.2.
 3. Complete affidavits of legal age and subscribing witness for each document
- ESTIMATED TIME TO COMPLETE:** Six hours

SIMULATION NO. 14 - WILLS

- OBJECTIVE** The student will prepare a will and affidavit of execution of will in accordance with legal typing principles.
- APPLICATION:** Read Chapter 36 and complete review questions in preparation for class.
2. Complete Simulation 36.2.
 3. Complete Affidavit of Execution of Will.
- ESTIMATED TIME TO COMPLETE:** Five hours