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

COURSE OUTLINE

Course Outline                   LEGAL OFFICE PROCEDURES  
Code No                           OPL 400   **(Prerequisite OPL300)**  
Program:                         OFFICE ADMINISTRATION -- LEGAL  
Semester:                        FOUR  
Date                              JANUARY, 1990  
Author:                         ROSE CAICCO

New

Revision:

APPROVED



Chairperson

Date

TOTAL CREDIT HOURS: 90

REQUIRED TEXTS;

- Legal Office Procedures, 2nd edition, Tina Kamakaris
- Working papers for the above
- Mozley fit Whitley's Law Dictionaryr 10th edition, Ivamy
- Perpetual Desk Diary or equivalent
- Webster Dictionary or equivalent

SUPPLIES REQUIRED

- Typing paper
- 12 file folders, file labels

**NOTE: STUDENTS WILL NOT BE ALLOWED INTO CLASS WITHOUT ALL REQUIRED TEXTS AND MATERIALS**

**I- PHILOSOPHY/GOALS;**

- 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, corporation, wills, estates and civil litigation.
- To give the student the opportunity to develop a general knowledge of law and **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.

**II. STUDENT PERFORMANCE OBJECTIVES;**

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 guest speakers are arranged to supplement classroom activities. **Attendance is mandatory**. If a student is not in attendance, then the student will have a choice of either
- a) a loss of 10% of the accumulative semester mark (excluding tests), or
  - b) preparing a paper relating to the field trip or topic under discussion - particulars to be approved by instructor.

#### **PRECEDENT BINDER**

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-

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

#### **SAMPLE MARKING SCHEME**

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
No envelopes	2 each occurrence

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

Binder #3 due **April 6, 1990**

A list of the minimum requirements for this binder is attached to the beginning of the objectives.

**STUDENT EVALUATION**

TYPING SPEED - Based on **th**ree highest five-minute timings as follows:

- 52 nwpm 1% on three timings
- 54 nwpm 2% on three timings
- 56 nwpm 3% on three timings
- 58 nwpm 4% on three timings
- 60 nwpm 5% on three timings

**All timings must have a 98% accuracy level.**

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. All work is due in the assigned class period on each simulation.

Note; Daily work will be graded "mailable" or "unmailable". Throughout the semester, the instructor will randomly select approximately 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 sample marking scheme shown on the previous page.

Any mailable items must receive a grade of 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.

**THE STUDENT WILL ~~ti~~AND ALL WORK IN NEATLY TYPED, PROPERLY ASSEMBLED, AND IN AN APPROPRIATELY LABELLED FILE FOLDER.**

**Each student will be required to keep a file in a designed classroom. This will facilitate the return of assignments, grades, and delivery of messages the Office Administration faculty need to relay to the student.**

The numerical equivalents corresponding to an alphabetical grade are as follows:

A+	=	90	100% (consistently outstanding)
A	=	80	89% (outstanding achievement)
B	=	70	79% (consistently above average)
C	=	60	69% (satisfactory or acceptable achievement)
R	=	0	59% (course must be repeated)

FINAL GRADE

The final mark in Semester 111 will be determined by tests as outlined in the following pages, binders, typing speed, and diaries.

SEMESTER IV

Tests	75%
Daily Assignments	10% *
Binder	10%
Typing Speed	5%
	100%

\* includes a diary

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 (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 REWRITES OF TESTS.

Test papers will be returned to the student after grading in order to permit verification of the results and to review the test. However, the student will be required to return all test papers to the instructor who will keep them on file until the end of the current semester. Failure to do so, either when the test is being conducted or after the results have been handed back, will result in a loss of 10% of the possible test mark, example, 10% if test out of 100.

## SCHEDULE FOR LEGAL OFFICE PROCEDURES

## SEMESTER IV

DATE (APPROX.)	SIMULATION	TOPIC
Jan. 8 - Jan. 19 (2 weeks)	100 - 102	Intro, to Real Estate
Jan. 22 - Feb. 2 (2 weeks)	103 - 104	Deeds, Affidavit of Residence and Land Transfer Tax
Feb. 5 - Feb. 23 (3 weeks)	105 - 108	Mortgages, Discharges/ and Document General
<b>Mar. 5 - Mar. 9</b>	<b>STUDY BREAK</b>	
Feb. 26 - Mar. 3 (3 weeks)	109 - 111	Vendor transaction; reporting out
Mar. 26 - Apr. 1B (2 1/2 weeks)	112 - 113	Purchaser transaction; reporting out
Apr. 19 - Apr. 27 (1 1/2 weeks)	114	Mortgage transaction; reporting out

## TESTS

A - Simulation	100 - 102	Chapter 23 - 26
B - Simulation	103 - 108	Chapter 27 - 29
C - Simulation	109 - 111	Chapter 30 & 33
D - Simulation	112 - 114	Chapters 34 & 35

MINIMUM REQUIREMENTS FOR BINDER NO. 3

- All of Simulation 103 & 104 - Deeds/transfers and schedules
- All of Simulation 106 - Mortgages/charges, Affidavit of Residence and Value, etc.
- All of Simulation 107 - Discharges of mortgages and correspondence, etc.
- All of Simulation 108 - Documents General
- All of Simulation 110 & 111 - Vendor Transaction
- All of Simulation 112 & 113 - Purchaser transaction
- All of Simulation 114 - Mortgage transaction

N.B. All precedents must be retyped and be 100% accurate - Any precedents provided from your textbook must also be retyped using the typing principles studied in class.

**Due Date: April 6, 1990**

**SIMULATION 100**

**INTRODUCTION TO REAL ESTATE**

**OBJECTIVE:** The student will be introduced to an agreement of purchase and sale as well as various ways of taking/holding title.

**APPLICATION:**

1. Read Chapter 23, pages 332-340 of text
2. Complete review questions, page 340 of text
3. Complete page 132 of simulations text

**ESTIMATED TIME**  
**TO COMPLETE:** 3 Hours to complete



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SIMULATION 101

LAND REGISTRY SYSTEM

OBJECTIVE                   The student will be introduced to the Land Registry and Land Titles Systems and descriptions of property.

- APPLICATION:
1. Read Chapter 24 of text, pages 341-352
  2. Complete review questions page 353 of text
  3. Complete 24.1 and 24.2 of simulations manualr^ (pages 133 and 134)

W     ESTIMATED TIME  
      TO COMPLETES       3 Hours to complete

**SIMULATION 102**

**INTRODUCTION TO DOCUMENTS IN LAND REGISTRY SYSTEM AND POLARIS**

**OBJECTIVE**                   The student will be introduced to the Province of Ontario Land Registry Information System (POLARIS)

**APPLICATION:**               1. Read Chapters 25 and 26 of text, pages 354-374  
                                      2. Complete review questions on pages 369 and 374 of text

**ESTIMATED TIME**  
**TO COMPLETE:**               3 Hours to complete

**SIMULATION 103**

**DEED OF LAND - FORM A**

**OBJECTIVE**                   The student will prepare one of the most commonly found documents in conveyancing a deed or transfer

- APPLICATIONS**
1. Read Chapter 27, pages 375-395
  - 2, Complete page 135, 27.1A, 27.IC, 27.ID and page 136, 27-2C, 27.3B

**ESTIMATED TIME**  
**TO COMPLETE:**           4 Hours to complete

**SIMULATION 104**

**AFFIDAVIT OF RESIDENCE AND LAND TRANSFER TAX**

**OBJECTIVE:** The student will be introduced to the tax structure in conveyancing.

- APPLICATION:**
1. Read Chapter 21, pages 395-400
  2. Complete review questions, pages 400-401 of text
  3. Complete page 139, 27.4 "A-C"

**ESTIMATED TIME**  
**TO COMPLETE:** 4 Hours to complete

**SIMULATION 105**

**MORTGAGES - FORM B - REPAYMENT PROVISIONS**

**OBJECTIVE:** The student will be introduced to the form used in the most common way of securing money under a conveyance. Repayment provisions will be emphasized.

**APPLICATION:** Read Chapter 28, pages 402-418 of text

2. Complete page 140 28.1 and 28.2 of simulations text

**ESTIMATED TIME**  
**TO COMPLETE:** 5 Hours to complete

**SIMULATION 106**

**MORTGAGES**

**OBJECTIVE:** The student will complete a full charge/mortgage under POLARIS system.

- APPLICATION:**
1. Read Chapter 28, pages 419-422 of text
  2. Complete review questions, pages 422-423 of text
  3. Complete page 141, 28.4

**ESTIMATED TIME**  
**TO COMPLETE:** 5 Hours to complete

SIMULATION 107

DISCHARGE OF MORTGAGE, FORM C

**OBJECTIVE:** The student will be instructed as to the proper form to use to remove a mortgage from title-

- APPLICATION:**
1. Read Chapter 29 of text, pages 424-432
  2. Complete review questions r pages 4 3 2-433 of text
  3. Complete pages 143 and 144, 29.1, "A-I"
  4. Complete additional discharges on following pages.

**ESTIMATED TIME**  
**TO COMPLETE:** 5 Hours to complete

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**ADDITIONAL ASSIGNMENT RE DISCHARGES**

Prepare a partial discharge of mortgage as follows:

Mortgagors:	Sandra McPherson and Mathew McPherson, of the City of Sault Ste. Marie in the District of Algoma.
Original Mortgagees:	The Lumber Manufacturing Company, a company 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	All and singular that certain parcel or tract of land and premises situate, lying and being in the City of Sault Ste. Marie in the District of Algoma and being composed of the whole of lots 1 to 20, both inclusive, in the Chipman Subdivision according to a plan thereof registered in the Registry Office for the Registry Division of Algoma as Number H-456-
Property Being Discharged:	The whole of lot 15 of the above mortgaged property.
Consideration:	\$500.00



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 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.

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.

**SIMULATION 108**

**DOCUMENT, GENERAL - FORM D**

**OBJECTIVE**

The student will complete documents general in accordance with the POLARIS system.

**APPLICATION**

1. Read Chapter 30, pages 434-438 of text
2. Complete review questions, page 438 of text
3. Complete text 30.1, page 144 of simulations text. Note: Type a power of attorney to attach as a schedule to your Document General.

**ESTIMATED TIME  
TO COMPLETE:**

3 Hours to complete

## SIMULATION 109

VENDOR/SALE TRANSACTION

**OBJECTIVE:** The student will follow a simple sale transaction from the agreement of purchase and sale to closing and reporting out. This simulation covers statement of adjustments.

**APPLICATION:**

1. Read Chapter 33, pages 449-461
2. Complete page 148, 33.1 - statement of adjustments

N.B. When calculating monthly adjustments, divide by the number of actual days in the month and not an average of 30.

**ESTIMATED TIME**  
**TO COMPLETE:**

5 Hours to complete

**SIMULATION 110**

**SALE TRANSACTION**

**APPLICATION**

- 1. Refer to Chapter 33

Complete item 33.2  
 Steps 1 and 2  
 Step 3 Initial letter to client  
 Step 4 . May use form letter  
 Step 5 Complete statutory declaration as  
 instructed  
 Step 6 as instructed  
 Step 7 ,  
 Step 8 - N/A  
 Step 9 . Write to Violet Massey  
 Step 10 (retype mortgage statement)  
 Step 11 Do memo to law clerk to do this  
 Closing April 28  
 Complete as instructed  
 Step 12 sl Check interest on Massey statement  
 Step 14 incorrect amount given  
 13 - N/A  
 Prepare Affidavit as to writ of  
 Step 15 execution and attach to deed  
 Step 16 transfer  
 Step 17 complete  
 Step 19 Use form from supply cupboard  
 18 - Use your diary  
 23 - As instructed

**ESTIMATED TIME  
TO COMPLETE:**

7 Hours to complete

**SIMULATION 111**

**SALE TRANSACTION - REPORTING OUT**

**APPLICATION:**

1. Refer to Chapter 33
2. Complete item 33.2, steps 24 & 25, pages 393 - 397 of simulation text
3. Complete review questions, pages 461 - 462 of text.

**ESTIMATED TIME**  
**TO COMPLETE:**

4 Hours to complete

**SIMULATION 112**

**PURCHASE TRANSACTION**

**OBJECTIVE:** The student will follow a simple purchase transaction from the agreement of purchase and sale to closing and reporting out.

- APPLICATION**
1. Read Chapter 34 of text, pages 463-476
  2. Complete 34.2 from step 1-26 of simulations text
- N.B. Use closing date already given in contract  
Sample fees for Toronto - see next page-

**ESTIMATED TIME**  
**TO COMPLETE:** 7 Hours to complete

SIMULATION 113

PURCHASER TRANSACTION (cont'd)

**APPLICATION:**

1. Refer to Chapter 34 of text
2. Complete review questions/ pages 476-477 of text
3. Complete steps 27 and 28 on pages 159 of simulation text

**ESTIMATED TIME  
TO COMPLETE:**

4 Hours to complete

## SIMULATION 114

## ACTING FOR THE MORTGAGEE

**OBJECTIVE** The student will complete a mortgage transaction as would be done when acting on behalf of an independent mortgagee.

**APPLICATIONS**

1. Refer to chapter 35 in your text, page 487
2. Complete 35.3 of simulation text

**Reminder:** Tax certificate is \$10.00 per lot.  
Include P.U.C. and work order costs in account  
Revise all figures accordingly.

**ESTIMATED TIME**  
**TO COMPLETE:** 5 Hours to complete



## SIMULATION 115

## PERPETUAL DESK DIARY

- OBJECTIVE:** The student will demonstrate the ability to record entries in a perpetual desk diary in a professional and businesslike manner.
- APPLICATION:** Proper records will be kept of appointments (dentist, doctor, counselling, placement, guest speakers, etc-) as well as test/assignment dates, tours, etc-
- Any changes or cancellations are to be recorded using proper techniques which will be discussed in class-
- Entries will be made under each day (not by week), and, if applicable, corners will be "clipped".
- Students are reminded that this is a business diary and personal entries are not acceptable <
- ESTIMATED TIME**  
**TO COMPLETE:** On a continuous basis for the entire winter semester-