



Level 2 Certificate for Legal Secretaries

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ILEX Level 2 Certificate for Legal Secretaries

Introduction

The ILEX Level 2 Certificate for Legal Secretaries qualification develops a number of inter-related skills for those students who are carrying out administrative tasks in a legal environment or hope to become a legal secretary.

The qualification is designed to cover those aspects of the skills and knowledge required. In order to achieve the full qualification, students are required to complete successfully two units – Legal Word Processing and Working in the Legal Environment. Working in the Legal Environment reflects the National Standards in Administration but contextualised within the legal environment. The qualification will also attract Technical Certificate recognition as well as supporting the Level 2 N/SVQ in Business Administration. Finally, there is the opportunity to enhance IT skills by way of a Level 2 Award in Legal Information Processing, again reflecting the demands of the sector.

Certification is also available for each individual unit.

Aims

- To develop the knowledge and understanding of administrative practices within the legal sector
- To develop the practical skills required within the sector
- To provide for progression within that sector

Entry Requirements

Students are required to have a school leaving certificate, a pass grade 5 or better in the SEC English language and an ECDL pass. Should students not have an ECDL pass they may attend the 'Welcome to computers' course prior to attending the course.

Course Structure

In order to achieve the Certificate, students have to successfully complete two units within the registration period:

Unit 1: Legal Word Processing

Unit 2: Working in the Legal Environment

Unit 1 is assessed by two task based assignments and Unit 2 is assessed by one task based assignment and are assessed through ILEX approved centres.

An approved centre is one which has been approved by ILEX as capable of offering appropriate tuition and guidance as well as professional assessment of the required level of competence and achievement. Specially prepared coursebooks are available to assist students in their studies.

Unit 1 Legal Word Processing

Outcome 1 use word processing software and audio equipment to create and amend business documents

Practical skills

The candidate will be able to:

- 1 log onto system
- 2 access word processing software
- 3 create new documents to a given house style eg:
 - letters
 - memos
 - notices
 - information sheets
- 4 format new and existing documents:
 - create and amend headers and footers
 - adjust page setup – orientation, margins, line spacing and justification
 - insert manual and automatic page numbering
- 5 copy type from manuscript and printed text
- 6 use text editing functions through the use of the keyboard and/or mouse:
 - delete
 - insert
 - cut
 - copy
 - move
 - paste
- 7 use text format as required through the application of font attributes:
 - bold
 - italics
 - underline
 - font size
 - font style
 - small capitals
 - centring
- 8 insert dates and references where appropriate
- 9 create and format tables:
 - insert, delete and adjust columns, rows and cells
 - apply shading and borders
 - hide or highlight gridlines
 - align cell content ie left, right, centre, decimalisation
- 10 select and insert symbols:
 - currency
 - copyright ©
 - @
 - accents (language)
 - arithmetic
- 11 insert and delete page breaks
- 12 apply automatic or manual numbering to paragraphs at a maximum of two levels
- 13 adjust paragraph styles using:
 - text alignment
 - bullets
 - line spacing
 - tabulation ie right, left, centre, decimal

- indentation ie block, hanging
- 14 use search and replace functions as required
- 15 create basic document templates with insertion points
- 16 select standard clauses or phrases and insert into a template
- 17 follow written instructions and interpret amendment and correction signs
- 18 use spell checking, grammar and thesaurus facilities to check and maintain accuracy
- 19 identify and correct legal terminology
- 20 identify and expand general and legal abbreviations
- 21 correctly route originals/copies/printouts as required
- 22 transcribe documents using audio and/or digital equipment
- 23 follow, interpret and implement audio conventions and instructions
- 24 produce documents within specific time limits
- 25 select page orientation ie portrait and landscape
- 26 name, save and print documents.

Underpinning knowledge

The candidate will be able to:

- 1 identify short cut keys
- 2 identify and correct spelling, grammar, punctuation, presentation and consistency errors including legal terminology.

Unit 1

Legal Word Processing

Outcome 2

use audio and word processing skills to produce legal documentation

Practical skills

The candidate will be able to:

- 1 identify and use appropriate layouts to create and amend different legal documents eg:
 - backsheet
 - frontsheet
 - brief to counsel
 - statements
 - deeds (eg lease, change of name, deed of gift)
 - basic Wills including codicils
 - affidavit
 - estate accounts
 - particulars of claim
 - file and attendance notes
- 2 present attestation clauses and jurats appropriately
- 3 correctly display concluding and signatory clauses
- 4 name, save and print draft and final copies of legal documents.

Unit 2

Working in the Legal Environment

Outcome 1

explain the different organisation structures that exist within different businesses including legal offices

Practical skills

The candidate will be able to:

- 1 describe the different types of organisational structure that exist ie flat or bureaucratic
- 2 research the structure of a legal office including span of control and functional structure.

Underpinning knowledge

The candidate will be able to:

- 1 describe the basic differences between the different organisation types eg:
 - specialisation of roles
 - authority levels
 - span of control
- 2 explain the structure of a legal office consisting of two or more departments and the inter-relationships involved.

Unit 2

Working in the Legal Environment

Outcome 2

identify the different branches of the legal profession and explain the roles of key personnel within a legal office

Practical skills

The candidate will be able to:

- 1 identify and research the different branches of the legal profession ie:
 - judiciary
 - barristers
 - solicitors
 - legal executives
- 2 produce an organisational chart to show the individual roles of different personnel including paralegals and support staff
- 3 describe the main aspects of work carried out by the different levels of staff within a legal office ie:
 - solicitors
 - legal executives
 - paralegals
 - legal secretaries
 - office services support staff eg reception, post room, reprographics, filing.

Underpinning knowledge

The candidate will be able to:

- 1 identify and describe the different departments found in a legal office and the general type of work typically undertaken within these eg: conveyancing, probate, criminal litigation, civil litigation, commercial, corporate, family
- 2 identify the main roles and responsibilities of individuals at departmental level within a legal office
- 3 explain the different qualification routes to become a barrister, solicitor or legal executive.

Unit 2

Working in the Legal Environment

Outcome 3

explain the role and responsibilities of the legal secretary

Practical skills

The candidate will be able to:

- 1 produce documentation including drafts of routine business correspondence eg letters, memos, legal documents, reports
- 2 use appropriate styles and layouts for business correspondence
- 3 describe how general office equipment is maintained in the legal environment eg photocopier, fax machine, telephone equipment, audio/digital equipment, IT equipment including printers and scanners
- 4 identify different types of media storage devices eg floppy disks, hard drive, CD-Rom, memory stick
- 5 describe the features and facilities of a modern photocopier and how they can be used eg enlarge, reduce, double sided, stapling, collating etc
- 6 identify ways of minimising office waste eg photocopying double-sided, ensuring originals are clean etc
- 7 describe different filing methods, manual eg lateral and vertical, and electronic eg directories, sub-directories, folders
- 8 select and use appropriate filing classification systems ie alphabetical, numerical, chronological, alpha-numerical, geographical
- 9 identify ways of cross-referencing files
- 10 describe procedures for receiving, sorting and distributing incoming mail
- 11 describe procedures for outgoing mail
- 12 identify and select different postal methods ie DX system, standard postal services, special delivery, couriers
- 13 perform simple calculations
- 14 identify and use different methods of communication as appropriate eg telephone, letters, memos, reports, fax, e-mail
- 15 identify policies and procedures for effective communication eg house-style guidance, data protection and confidentiality policies, rules and regulations for making and receiving telephone calls, sending and receiving e-mails
- 16 describe appropriate techniques that can be used to communicate effectively within the office:
 - verbal: pre-preparation; employing active listening skills; tone of voice; confirming understanding of key points; recording full details of messages
 - non-verbal: use of clear, simple language; style and tone; accuracy of information; following house-style guidance; use of business conventions eg complimentary close; significance of body language; dress codes.

Underpinning knowledge

The candidate will be able to:

- 1 identify different internal and external information systems, eg intranet, organisational policies and procedures, staff handbooks, databases, telephone directories, DX directory, internet
- 2 describe the advantages and disadvantages of using manual and electronic information systems
- 3 describe the general principles of case management software
- 4 explain the importance of maintaining confidentiality and security of information
- 5 describe the basic requirements of copyright legislation in relation to the copying of documents
- 6 describe procedures for maintaining paper-based and electronic information systems including storage and retrieval ie file retention policy, archiving
- 7 compare the advantages and disadvantages of different postal methods
- 8 explain the advantages and disadvantages of using different communication systems eg telephone, fax, e-mail

- 9 describe the advantages and disadvantages of different communication methods eg formal, informal, one-way, two-way, including benefits to staff and to organisation
- 10 describe the different channels of internal communication and explain the purpose of each eg meetings, staff notices, one to ones
- 11 identify and explain the barriers to effective communication (verbal and non-verbal) and state how they can be overcome.

Unit 2

Working in the Legal Environment

Outcome 4

identify and describe the relevant legislation, policies and procedures that apply to the business environment

Practical skills

The candidate will be able to:

- 1 identify current legislation in terms of health, safety and welfare of employees and visitors
- 2 describe the role of the first-aider and/or appointed person in the organisation
- 3 identify potential hazards and risks in a given work area
- 4 identify current legislation in terms of data protection and apply to organisational policies and procedures.

Underpinning knowledge

The candidate will be able to:

- 1 explain how a healthy and safe working environment affects personal rights and responsibilities including the use of display screen equipment
- 2 explain how a healthy and safe working environment affects the organisation
- 3 describe the importance of maintaining safety, security and confidentiality when dealing with customer and organisation information
- 4 identify the main points included in a written contract of employment and its importance
- 5 describe the importance of an organisation's rules and regulations (staff handbook) eg grievance procedures, disciplinary procedures
- 6 identify external sources of information on current legislation eg internet, trade unions, trade journals, professional bodies, library.

Unit 2

Working in the Legal Environment

Outcome 5

plan and prioritise own workload and describe the benefits of effective team working

Practical skills

The candidate will be able to:

- 1 identify techniques to manage own workload eg diaries, timesheets, planners, to do lists, schedules
- 2 organise and prioritise given tasks
- 3 identify and describe circumstances in which deadlines cannot be met
- 4 describe the importance of creating and maintaining effective working relationships with others
- 5 describe key considerations for effective communication within a team:
 - the scope of communication
 - types of channel
 - methods (speech, written, signs, action, silence, non-verbal, general behaviour and attitudes).

Underpinning knowledge

The candidate will be able to:

- 1 state the importance of gaining full information in order to complete work
- 2 explain how to prioritise and the importance of deadlines
- 3 explain how to maintain a manageable workload in order to maximise the use of own time eg prioritisation, team working, identifying aids to managing workload
- 4 describe the importance of effective communication when working with others.

Unit 2

Working in the Legal Environment

Outcome 6

describe the importance of establishing and maintaining effective customer relationships

Practical skills

The candidate will be able to:

- 1 describe the role of the individual in establishing effective customer/client relationships including limits of authority
- 2 illustrate ways of creating a positive and professional image
- 3 describe procedures for dealing with client complaints.

Underpinning knowledge

The candidate will be able to:

- 1 identify different types of internal and external customers
- 2 explain the importance of establishing and maintaining effective customer/client relationships eg:
 - customer focused business
 - organisational benefits
 - increased customer satisfaction
 - improving image and reputation of organisation
 - reduction in complaints
 - individual satisfaction (greater enjoyment, greater job security, better promotion prospects)
- 3 explain how an individual can contribute to meeting customer expectations eg:
 - interacting effectively with customers and clients
 - using appropriate verbal and non-verbal communication skills
 - using questioning and listening skills
 - identifying potential communication problems and solutions
- 4 describe the ways in which an organisation can create and maintain effective customer/client relationships eg:
 - mission statements/customer charters
 - style of written and verbal communications
 - customer satisfaction surveys (feedback)
 - quality management systems eg Investors in People, Lexcel, ISO.

