



Australian Government

BSBLEG306 Maintain records for time and disbursements in a legal practice

Release: 1

BSBLEG306 Maintain records for time and disbursements in a legal practice

Modification History

| Release | Comments |
|-----------|--|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

Application

This unit describes the skills and knowledge required to maintain time records and enter disbursements incurred.

It applies to individuals who work under supervision and apply a broad range of administrative competencies in a legal office work environment, using some discretion and judgement. In this role, individuals provide services to support legal practitioners and may provide technical advice and support to a team.

This unit underpins all units of competency in the Legal Services stream.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – Legal Services Administration

Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
|--|---|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i> |
| 1. Record fee-earner time | 1.1 Access timesheets submitted by fee-earners 1.2 Organise self or other to enter time recording into accounting system against relevant client or client matter file, or other relevant codes such as training and marketing 1.3 Note irregularities and/or uncertainties and follow standard resolution procedures or alert designated person as appropriate 1.4 Make entries within agreed timelines |

| ELEMENT | PERFORMANCE CRITERIA |
|---------------------------------|---|
| 2. Enter disbursements incurred | <p>2.1 Record details of disbursements accurately against relevant client or client master file according to a firm's policies and procedures</p> <p>2.2 Note irregularities and/or uncertainties and ensure standard resolution procedures are followed, or alert designated person as appropriate</p> <p>2.3 Allocate file/master number to all relevant documentation and file appropriately</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

| Skill | Performance Criteria | Description |
|----------------------------|-----------------------------|--|
| Reading | 1.1, 1.3, 2.1, 2.2 | <ul style="list-style-type: none"> Interprets textual information to clarify data and to determine and adhere to workplace practices |
| Writing | 1.3, 1.4, 2.2 | <ul style="list-style-type: none"> Uses clear, accurate and relevant language to complete workplace documentation |
| Oral Communications | 1.3, 2.2 | <ul style="list-style-type: none"> Articulates clearly using specific and relevant language and appropriate tone to convey concerns |
| Numeracy | 1.2, 2.1 | <ul style="list-style-type: none"> Uses mathematical equations to accurately calculate and record periods of time and expenditures for record-keeping processes |
| Navigate the world of work | 1.3, 2.2 | <ul style="list-style-type: none"> Recognises and responds to organisational policies and procedures |
| Interact with others | 1.3, 2.2 | <ul style="list-style-type: none"> Seeks to cooperate with others to achieve results in immediate work context |
| Get the work done | 1.2-1.4, 2.1, 2.2, 2.3 | <ul style="list-style-type: none"> Makes routine decisions and implements standard procedures for routine tasks, using formal decision-making processes Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficiency and effective outcomes Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts |

Unit Mapping Information

| Code and title current version | Code and title previous version | Comments | Equivalence status |
|---|--|---|--------------------|
| BSBLEG306 Maintain records for time and disbursements in a legal practice | BSBLEG306A Maintain records for time and disbursements in a legal practice | Updated to meet Standards for Training Packages | Equivalent unit |

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>