



Australian Government

Department of Education, Employment and Workplace Relations

BSALPP401A Prepare and produce complex legal documents

Release: 1

Modification History

Not Available

INTRODUCTION

This Unit covers using either a range of advanced functions within at least one software package, or integrating functions from at least two software packages to produce complex documents.

This Unit has been adapted from BSATEC401B Produce complex documents.

This Unit can be assessed alone or in combination with other units making up a job role.

Element of Competency

Performance Criteria

Establish document design and structure

- Requirements of the task are identified
- Software appropriate to the task is selected
- Document design and structure are determined
- Document is designed and structured to meet designated criteria
- Existing precedent documents are reviewed for appropriateness
- Can build new precedents from existing documents

Develop precedents and macros for document design

- Precedents and macros are developed and used to ensure consistency of design and layout
- Templates and macros are evaluated and amended to ensure document requirements can be met
- Macros are linked as required
- Improvements to the structure/design of existing documents are suggested and a review process of suggested improvements is facilitated

Organise self or others to produce documents

- Documents are prepared using appropriate and available precedent documents according to a firm's policies and procedures
- Relevant data is entered and edited accurately
- A range of advanced functions are used to ensure the accurate completion of the task
- Documents are checked for spelling, grammar numeric data and layout
- Documents are proofread for accuracy of contents and consistency of layout and style
- Modifications are made to meet required specifications

Organise self or others to print documents

- Documents are printed as required
- Review of documents is arranged with the designated person/section
- Final printing of document is undertaken

Save file and exit system

- Document is saved and stored in appropriate directory or folder
- File is closed and applications programs are exited without loss of data
- Back up copies of files are made in accordance with specified procedures if required
- Disks/data are filed and stored in accordance with a firm's policies and procedures

RANGE OF VARIABLES

Software packages may include

- word processing
- database
- spreadsheet
- page layout software
- graphics
- document management software

Documents may include:

- precedents
- contracts
- research reports
- costings
- promotional brochure
- in-house newsletter

Document design and structure may include:

- firm style and letterhead constraints
- links to existing information
- use of AutoText
- merging of information
- legislated document layout guidelines

Designated criteria may include:

- a firm's requirements
- legal practitioner's requirements
- legislative requirements

Existing documents may include:

- existing precedents
- developed contracts/documents
- specialist/technical texts and vocabulary

Advanced functions may include:

- templates
- macros
- linking macros
- AutoText
- glossaries
- table of contents
- index
- formatting, e.g. defining styles
- importing graphs, sections, margins

	• scanner/colour printer
A firm's policies and procedures may include:	• authorising precedent changes • authorising creation of new legal precedents • backup procedures • initiation of files • accessing files • updating files • file maintenance • storage of disks/data • office procedure manual • information sources • information specific to the firm • security/confidentiality/ privacy procedures • verifying and authorising information • recording information
Designated person may include:	• lawyer • partner • legal practice manager • accountant
The area of law may include*:	• commercial law • corporate law • criminal law • family law • industrial relations/employment law • property law • tax law • litigation • wills * These are nine common areas of law. The area of law is not restricted to this list; other areas of law may be applicable.
Legislative requirements may relate to:	• relevant State/Territory/Commonwealth legislation • governing legal practice Acts in each State/Territory • the area of law • employee-employer agreements and legislation

- Relevant legislation may relate to:
- Occupational Health and Safety
 - Copyright
- Timelines for completion of documents may be affected by:
- client needs
 - availability of information resources
 - legal or procedural requirements
 - operator's workload
- Difficulties which may need management may include:
- available resources
 - client needs
 - liaising with others
 - technical difficulties
 - alterations to instructions
- Precedents relevant to the particular area of law may include:
- leases
 - mortgages
 - contracts
 - transfer of shares
 - wills
 - a firm's templates
 - agreements
 - letter confirming client's instructions and rights
 - court documents
 - standard letters
- The precedent bank may be:
- in-house
 - external
 - on-line
 - stored pre-printed forms

EVIDENCE GUIDE

Critical aspects:	• where instructing others, instructions are clear with adequate explanation to allow the task to be completed • assistance and/or advice is provided to others • where instructing others, supervision is provided throughout the task in relation to: -ensuring that work is completed within timelines -ensuring that correct technical process is employed -checking produced document meets requirements -checking documents for mistakes -checking that document is saved appropriately -ensuring that confidentiality and security of information is maintained -ensuring that problems are solved efficiently • OHS guidelines relating to screen based equipment and ergonomic workstations are observed • speed and accuracy are to the firm's standards. (This may be the standard in Standards Australia AS 2708-1991 Typing Speed or AS 3549-1989 Typing Accuracy) • difficulties, irregularities or uncertainties are resolved expediently • firm's style, layout etc is followed in preparation of documents • defaults are set correctly • templates are used in preference over new layouts • macros are established where any shortcuts are possible • disparate macros are integrated to facilitate more efficient document production where appropriate • improvements to the structure and design of existing documents are explained and demonstrated • document is produced and presented with correct enclosures if required, to designated person within agreed timelines • non-disclosable information is not communicated and where any doubt exists as to the information's status it is not disclosed • all work is conducted within accepted codes of conduct including those relating to: maintaining confidentiality, use of company property, duty of care, ethical behaviours, privacy, non-discriminatory practice, conflict of interests and compliance with reasonable direction
Resource implications:	The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include: • workplace manuals and reference materials such as company policy, procedural manuals and checklists

- appropriate technology such as computers with relevant software, photocopier, colour printers and binding machine

Consistency in performance: This unit of competency will require evidence to be collected across a range of events, eg. dealing with different types of documents, and over a period of time to ensure that situational variables are consistently achieved.

Context of assessment: Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- simulation
- skills portfolio
- third party reports

Underpinning knowledge and skills

- appropriate software, document design and structure
- developing and testing templates and macros
- creating links between macros
- a range of advanced functions and how to apply them appropriately
- OHS
- appropriate sources of assistance, content and technological
- appropriate technology, short cuts, AutoText
- application of a firm's policies and procedures required in the full range of tasks covered

Skills

- literacy: follows complex legal procedures; considers aspects of context, purpose and audience when generating and formatting texts; reads a range of procedural and technical texts to identify the most appropriate software application; uses a variety of strategies for

planning and reviewing own work; demonstrates drafting techniques

- communication: follows and interprets oral instructions; provides clear and specific instructions about information required;
- proofreading and editing: ensures clarity of meaning and conformity to enterprise requirements; checks for accuracy and consistency of information by consulting additional resources
- problem solving: uses processes flexibly and interchangeably
- numeracy: collates and presents data, graphs and annotated references; adheres to designated timelines
- keyboarding: uses a range of advanced functions of software applications

KEY COMPETENCIES

Utilisation of the Key Competencies required in the performance of this unit

Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	2	2	1	2	3

Performance levels:

Level 1	Level 2	Level 3
- carries out established processes - makes judgements of quality using given criteria	- manages processes - selects the criteria for the evaluation process	- establishes principles and processes - evaluates and reshapes processes - establishes criteria for evaluation of processes