



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	2.1 Record details of disbursements accurately against relevant client or client master file according to a firm's policies and procedures 2.2 Note irregularities and/or uncertainties and ensure standard resolution procedures are followed, or alert designated person as appropriate 2.3 Allocate file/master number to all relevant documentation and file appropriately

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	Interprets textual information to clarify data and to determine and adhere to workplace practices
Writing	1.3, 1.4, 2.2	Uses clear, accurate and relevant language to complete workplace documentation
Oral Communications	1.3, 2.2	Articulates clearly using specific and relevant language and appropriate tone to convey concerns
Numeracy	1.2, 2.1	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	Recognises and responds to organisational policies and procedures
Interact with others	1.3, 2.2	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	- 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>

Assessment Requirements for BSBLEG306 Maintain records for time and disbursements in a legal practice

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Performance Evidence

Evidence of the ability to:

- demonstrate honesty and integrity in all financial dealings
- accurately enter timesheet data and disbursements into accounting system in accordance with firm's policies and procedures
- present relevant documentation to designated person/s for approval within agreed timelines
- consistently handle and administer trust accounts in accordance with firm's policies and procedures and legislative requirements
- apply standard procedures to resolve irregularities and/or uncertainties and/or alert designated person/s as appropriate.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline scope of legal practitioner/support role and own responsibilities and obligations
- summarise relevant processes, current legislation, legal processes and documentation required in this role.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the legal services administration field of work and include access to:

- office equipment and resources
- appropriate legislation and regulations relevant to common legal matters
- background information on courts, their jurisdiction and behavioural requirements

- people with expert knowledge.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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