



Australian Government

BSBLEG308 Assist in prioritising and planning activities in a legal practice

Release: 1

BSBLEG308 Assist in prioritising and planning activities 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 assist others within a legal practice to organise a legal schedule.

It applies to individuals who work under supervision to arrange appointments and other activities based on court dates and required legislative timeframes. In this role, individuals apply a broad range of administrative competencies in a legal office work environment, using some discretion and judgement. They provide support to 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 file-related critical dates and times	1.1 Identify file-related deadlines 1.2 Record file-related deadlines according to a firm's policies and procedures
2. Make and record appointments on behalf of designated person	2.1 Establish and clarify priorities of designated person/s 2.2 Ensure timelines for achievement of priorities are agreed and documented/recorded

ELEMENT	PERFORMANCE CRITERIA
	2.3 Arrange and/or re-arrange appointments to a time or date which is more convenient for parties involved
3. Assist designated person/s to prepare for critical dates	3.1 Check records daily for upcoming appointments and commitments 3.2 Remind designated person/s of critical file dates 3.3 Prepare and distribute information meeting legislative requirements to designated person/s prior to critical dates 3.4 Monitor timelines regularly in consultation with designated person
4. Follow up outcomes of meetings or other activities	4.1 Plan and organise appropriate follow-up actions and activities in conjunction with designated person and relevant parties 4.2 Update file notes according to a firm's policies and procedures

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, 1.2, 3.1, 3.4, 4.2	Recognises and interprets textual data to identify and plan job deadlines to adhere to requirements
Writing	1.2, 2.2, 3.2-3.4, 4.1, 4.2	Uses clear, accurate and relevant language to organise, record and update information and complete workplace documentation
Oral Communication	2.1, 2.2, 3.2, 3.4, 4.1	- Articulates clearly using specific terminology and relevant tone to convey requirements - Uses active listening and questioning techniques to confirm understanding
Numeracy	2.2, 2.3	Uses basic mathematical formula to calculate and monitor work timeframes
Navigate the world of work	1.2, 3.3, 4.2	- Takes personal responsibility for adherence to legal and regulatory requirements - Recognises and responds to organisational policies and procedures
Interact with others	2.1-2.3, 3.2-3.4, 4.1	- Selects appropriate mode of communication for a specific purpose relevant to own role - Cooperates with others as part of familiar routine

		activities and contributes to specific activities requiring joint responsibility and accountability
Get the work done	2.3, 3.4, 4.1	• Takes responsibility for planning, sequencing and prioritising tasks and own workload for efficient and effective outcomes • Takes responsibility for outcomes of routine decisions related directly to own role

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBLEG308 Assist in prioritising and planning activities in a legal practice	BSBLEG308A Assist in prioritising and planning activities 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 BSBLEG308 Assist in prioritising and planning activities in a legal practice

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Performance Evidence

Evidence of the ability to:

- demonstrate an understanding of responsibility involved in making arrangements for others and legal consequences of not meeting critical timelines
- interact courteously and efficiently with other parties when making, confirming and changing appointments
- apply organisational skills and firm's procedures to accurately and legibly diarise all relevant details of appointments and file deadlines and follow up as required
- apply standard procedures to solve problems (such as double-bookings or non-attendances) promptly and satisfactorily
- create and maintain up-to-date, legible, accurate and accessible records of all activities and outcomes according to firm's policies and procedures.

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 to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- firm's policies and procedures
- discuss firm's administrative systems and files
- adhere to codes of conduct including:
 - privacy and confidentiality
 - use of company property
 - duty of care
 - ethical behaviour

- non-discriminatory practice
- conflict of interest
- compliance with reasonable direction.

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
- legislation and regulations relevant to common legal matters
- people with expert knowledge.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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