



Australian Government

Department of Education, Employment and Workplace Relations

BSBLEG308A Assist in prioritising and planning activities in a legal practice

Revision Number: 1

BSBLEG308A Assist in prioritising and planning activities in a legal practice

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist others (for example, Partner, Solicitor, Fee Earner, Human Resources Manager, External Client) to organise a legal schedule. This involves arranging appointments and other activities based upon court dates and required legislative timelines. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.
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Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
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 in discussion 2.2. Ensure timelines for achievement of priorities are agreed and documented/recorded 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 the 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

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen to clear sequenced instructions and note individual preferences regarding arrangements for group activity; apply questioning to clarify information; and discusses and confirm requirements and priorities of others
- teamwork skills to clarify defined purposes and objectives to be achieved by working with others
- literacy skills to follows a firm's legal procedures; and sequence writing with attention to organising principles of date, time, importance or file code according to organisation's requirements
- numeracy skills to order and compare sets of dates using simple everyday data; adheres to deadlines; and keep accurate records
- organisational skills to plan and prioritise own and other's activities and time
- problem solving skills to negotiate task distribution with other members of the group; and select most efficient and appropriate times for appointments etc.
- technology skills to use a range of software applications.

Required knowledge

- 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
- firm's administrative systems and files
- accepted codes of conduct including those relating to:
 - privacy and confidentiality
 - use of company property
 - duty of care
 - ethical behaviour
 - non-discriminatory practice
 - conflict of interest
 - compliance with reasonable direction

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

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

Context of and specific resources for assessment

Assessment must ensure:

- wherever possible the context is a real or simulated workplace
- access to workplace manuals and reference materials such as company policy, procedural manuals and checklists
- access to list of relevant sources of documentation and sample forms
- access to background information on courts, their jurisdiction and behavioural requirements
- access to appropriate technology such as computers with relevant software
- access to appropriate texts and access to person's with expert knowledge such as legal practitioners
- access to appropriate legislation and regulations relevant to common legal matters, such as that accessible via:
 - <http://www.law.gov.au>

EVIDENCE GUIDE	
	• http://www.ag.gov.au • http://www.austlii.edu.au/ • http://www.australia.gov.au/states-territories • http://www.act.gov.au • http://www.nsw.gov.au • http://www.nt.gov.au • http://www.qld.gov.au • http://www.sa.gov.au • http://www.tas.gov.au • http://www.vic.gov.au • http://www.wa.gov.au
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • questioning (oral or written) • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG301A Apply knowledge of the legal system to complete tasks • other legal services administration or general administration units.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

<i>File related deadlines</i> may include:	• court appearances • document lodgement cut off dates • legislated timelines • settlement dates • other file related deadlines not included in this listing.
<i>Designated person</i> may include:	• external client • lawyer • legal practice manager • partner • supervisor.
Difficulties in meeting <i>timelines</i> may relate to:	• available resources • client needs • court adjournments • failure of other parties/agencies to produce required materials on time • variations to contracts.
<i>Appointments</i> may be arranged:	• in response to continuing legal education requirements as designated by relevant Law Societies and Institutes • in response to new/existing client enquiry/request • to meet court requirements • to meet legal matter requirements • to meet the need for consulting experts.
<i>Records</i> may include, but are not limited to:	• client's details may include: • name • telephone number • type of matter • court details may include: • date • location

RANGE STATEMENT

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| | <ul style="list-style-type: none">• matter• time• dates on which follow-up actions are occur may include:<ul style="list-style-type: none">• payment of fees• progress report to client• property settlement• other records not included in this listing. |
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RANGE STATEMENT	
<i>Critical file dates</i> may include:	• court appearances • court mentions • lodgement of documents • meetings with clients • meetings: • external • internal • property settlements • settlement of accounts • travel arrangements.
<i>Legislative requirements</i> may relate to:	• relevant State/Territory/Commonwealth legislation - their legal process time and action requirements eg. required amount of time serving notice, timeline for submission/exchange of documents and/or monies, number and type of meetings required between parties. • Governing legal practice Acts in each State/Territory • the client and a firm (eg. Consumer Credit Code, Privacy Act, secrecy laws, Codes of Practice, Common Law and Statutory Duties of Care involving financial relationships) • schedule of fees and duties payable • employee-employer agreements and legislation
<i>File notes</i> may be stored:	• electronically • in date order • on a checklist/form • on a file note spike • on the computer • paper based • with client file.
<i>File notes</i> may include:	• date • discussion notes • file concerned • mode of attendance (eg. in person/telephone) • people involved • resulting activity, action outcome • time expended on matter.

Unit Sector(s)

Unit sector	
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Competency field

Competency field	Administration - Legal Services Administration
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Co-requisite units

Co-requisite units		