

DEPARTMENT OF BUSINESS AND OFFICE ADMINISTRATION

COURSE OUTLINE – Fall 2022

OA1610 (A2): Legal Office Administration I – 3 (3-0-0) 45 Hours for 15 Weeks

Northwestern Polytechnic acknowledges that our campuses are located on Treaty 8 territory, the ancestral and present-day home to many diverse First Nations, Metis, and Inuit people. We are grateful to work, live and learn on the traditional territory of Duncan's First Nation, Horse Lake First Nation and Sturgeon Lake Cree Nation, who are the original caretakers of this land.

We acknowledge the history of this land and we are thankful for the opportunity to walk together in friendship, where we will encourage and promote positive change for present and future generations.

INSTRUCTOR: Leah Paslawski **PHONE:** n/a
OFFICE: KMSC Law Office **E-MAIL:** leahp@kmsc.ca
OFFICE HOURS: By appointment

CALENDAR DESCRIPTION:

This course is an introduction to legal office procedures. Upon completion, students will have a thorough knowledge and understanding of office procedures specific to a law firm including opening, closing, and maintaining client files; preparing legal correspondence; using Outlook for incoming/outgoing messages, calendaring, and meeting set up; the mechanics of timekeeping and creating billing statements; as well as managing office politics and human dynamics. The students will also be introduced to wills, powers of attorney, and personal directives. Records and time management will also be emphasized.

PREREQUISITE(S)/COREQUISITE:

None

REQUIRED TEXT/RESOURCE MATERIALS:

1. Bedford, Jennie, *Legal Keys Keyboarding Drills & Terminology*, 5th ed, Tusker International (Creative Works) Ltd, 2022.
2. Collis, Diana, *Working in a Legal Environment*. Emond, 2021.

DELIVERY MODE(S):

All sessions will take place in the classroom, there will be no remote delivery of the lectures. All quizzes and exams must be written in person.

COURSE OBJECTIVES:

- To gain the knowledge required to function efficiently and effectively in a productive law office environment
- To develop a basic knowledge of the legal secretary/assistant's clerical and practical duties required in a law office (including Microsoft Outlook)
- Development of keyboarding speed and accuracy
- Understanding the key role typing skills have when it comes to a legal assistant's employability
- To develop and apply the procedures involved in estate planning and in the creation of estate documents
- To develop a thorough understanding of Microsoft Outlook 2016: apply the skills needed to use Outlook to send and receive emails, as well as to organize an office with the use of Outlook calendars, task list options, and the scheduling assistant.

LEARNING OUTCOMES:

The student will:

- recognize what it means to dress, act, and behave professionally
- recognize and apply effective phone, voicemail, and e-mail techniques
- describe and apply the concept of effective time management
- formulate plans to efficiently manage their time
- perform and apply common billing practices and the mechanics of law office time keeping
- illustrate the mechanics of effective file management
- recognize, evaluate, and justify the realities of office politics
- recognize, evaluate, and apply methods to work effectively with "challenging" clients, attorneys, and colleagues.
- identify and apply the rules of estate planning and prepare law office documents.
- work on proofreading skills
- develop expertise in keying legal material – improving keying skills in both speed and accuracy

TRANSFERABILITY:

Please consult the Alberta Transfer Guide for more information. You may check to ensure the transferability of this course at the Alberta Transfer Guide main page <http://www.transferalberta.ca>.

**** Grade of D or D+ may not be acceptable for transfer to other post-secondary institutions. Students are cautioned that it is their responsibility to contact the receiving institutions to ensure transferability**

EVALUATIONS:

Assignments	40%
Projects/ Tests	20%
Professionalism and Participation	10%
Final Exam	30%

Note: Speed, accuracy, as well as proofreading and correction skills will be fundamental in the evaluation of legal documents prepared

What is Professionalism?

Webster's Dictionary definition of professionalism is, "the conduct, aims, or qualities that characterize or mark a profession or a professional person." Practicing the key concepts (listed below) will help you to master professionalism and prepare you to display this important aspect of your working self throughout the semester and during any work experience placement.

The students will demonstrate professionalism and job success skills through:

- **Conduct & Character** – Your values, behaviors, and the demeanor in which you perform your daily tasks.
 - This includes consistent attendance or online presence; fulfilling your duties properly, and in a timely manner while respecting the learning of others and projecting a professional image; conducting yourself with integrity: a concept of consistency of actions, values, methods, measures, principles, expectations, and outcomes; striving to be regarded as honest and truthful.
- **Competency & Excellence** — the quality of being outstanding or extremely good at what you do; surpassing ordinary standards; A display of competence indicates sufficiency of knowledge and skills that enable someone to act in a wide variety of situations.
 - Ability to complete work at a high standard or high quality. Capable and willing to participate in on-line activities and discussion forums with substantive and quality contributions reflecting your knowledge of course content. In order to demonstrate excellence, you must take initiative to go beyond what is required and display a commitment to continually make improvements; exhibit an understanding of your roles and responsibilities and be accountable for them; be committed to problem solving and troubleshooting, while also aiding those around you.
- **Collaboration & Teamwork** — the ability to work collaboratively, while demonstrating professional and ethical conduct with classmates and instructors.
 - Displaying the best aspects of teamwork and practicing good communication skills.

GRADING CRITERIA: (The following criteria may be changed to suite the particular course/instructor)

Please note that most universities will not accept your course for transfer credit **IF** your grade is **less than C-**.

Alpha Grade	4-point Equivalent	Percentage Guidelines		Alpha Grade	4-point Equivalent	Percentage Guidelines
A+	4.0	90-100		C+	2.3	67-69
A	4.0	85-89		C	2.0	63-66
A-	3.7	80-84		C-	1.7	60-62
B+	3.3	77-79		D+	1.3	55-59
B	3.0	73-76		D	1.0	50-54
B-	2.7	70-72		F	0.0	00-49

COURSE SCHEDULE/TENTATIVE TIMELINE:

<p>Week One Please use part of this week to get yourself prepared for the course. Get to know your course D2L site, introduce yourself in the “introduction forum” and read through the course outline and timeline.</p> <p>Introduction and Overview Professionalism Read: The Legal Office Environment, Chp. 1 answer questions on p.16, #3, 7, 8, 9 Assignment 1: Short answer assignment Legal Keys: read p. ix-xxii, do p. 34-35 Law Office Ethics and the Role of the Legal Assistant</p> <p>All assignments are due <u>at the beginning</u> of next week’s first class; hand in on D2L.</p>	<p><u>Questions / Notes:</u></p> <p>Use this area to write yourself any notes or questions you may have each week and want to ask me later.</p>
<p>Week Two Law Office Ethics and Telephone Etiquette</p> <p>Read: Readings on D2L and Working in a Legal Environment, Chp. 7. answer questions on p.57</p> <p>Legal Keys: p. 36-39, including all of Timing 2</p>	
<p>Week Three Time Management</p> <p>Read: Readings on D2L and Working in a Legal Environment, Chp. 3 Assignment 2: Time Management Legal Keys: p. 40-44, to end of Paragraph 2</p>	
<p>Week Four Timekeeping and Billing</p> <p>Read: Readings on D2L and Working in a Legal Environment, Chp. 6</p> <p>Legal Keys: p. 44 (from Paragraph 3) - 49 (end of Timing 1) Timekeeping Exercise</p>	

<p>Week Five File Opening and Initial Tasks</p> <p>Read: Readings on D2L, Working in a Legal Environment Chp. 5</p> <p>No Legal Keys Assigned – Thanksgiving</p>	<p><u>Questions / Notes:</u></p>
<p>Week Six File and Document Management</p> <p>Readings on D2L TYPING: Test 1</p> <p>Legal Keys: p. 49 (Timing 2) – p. 54 (end of Timing 1) Estate Planning project assigned Assignment 3 (File Set-Up) assigned</p>	
<p>Week Seven Introduction to Legal Office Correspondence</p> <p>Reading on D2L (Communication and Writing for Paralegals) and <i>Working in a Legal Environment</i> Chp. 8 and Chp. 9</p> <p>Legal Keys: p. 54 (Timing 2); p. 60 (Exercise 1) Assignment 4 – Conflict Letter</p>	
<p>Week Eight Communication and Writing continued</p> <p>Reading on D2L (Email and Social Media Communication) Legal Keys: p. 58 (Timing 3); p. 63 (Exercise 2)</p>	
<p>Week Nine Proofreading Techniques and Exercises</p> <p>NO READINGS</p> <p>Legal Keys: p. 65-69 (Exercises 3 and 4)</p>	
<p>Week Ten Introduction to Family Law Family Law In-Class Presentations</p>	

<p>Week Eleven Introduction to Wills and Estates <u>Estate Planning Part 1:</u> Wills</p> <p>Estate Planning Project DUE Legal Keys: p. 194 to 200 (Exercise 6)</p>	<p><u>Questions / Notes:</u></p>
<p>Week Twelve <u>Estate Planning Part 2:</u> Powers of Attorney and Personal Directives</p> <p>Typing: TEST 2 Legal Keys: p. 143 – 147 Timing 2 and 3)</p>	
<p>Week Thirteen Office Politics and Human Dynamics</p> <p>Read: Law Office Skills Chp. 8 and Chp. 9 (on D2L) Assignment 6 (from Law Office Skills)</p> <p>Review and Study for Final Exam – Optional Additional Final Exam Review Class to be added</p>	

STUDENT RESPONSIBILITIES:

Daily attendance is essential. Attendance will be taken in class. Students are responsible for completing assignments outside of class time when necessary.

NOTE: Students must attend Week 10 – Introduction to Family Law (November 15, 2022 class) in order to participate in and receive marks for the family law presentations.

If you are ill, please e-mail instructor to confirm and have a classmate inform you of the work covered that day. **Classes will not be recorded, unless there are exceptional circumstances.** More than three (3) missed classes may result in a recommendation of “Debarred from Exam.” (See Polytechnic Calendar).

Assignments and tests missed will be recorded as zero. Assignments are due on the dates and at the time set by the instructor. No late assignments or rewrite of exams are permitted. Plagiarism will not be tolerated.

**Note: all Academic and Administrative policies are available at [NWP Policies | Northwestern Polytechnic \(nwpolytech.ca\)](https://www.nwpolytech.ca)

STATEMENT ON PLAGIARISM AND CHEATING:

Cheating and plagiarism will not be tolerated and there will be penalties. For a more precise definition of plagiarism and its consequences, refer to the Student Conduct section of the Polytechnic Calendar at <https://www.nwpolytech.ca/programs/calendar/> or the Polytechnic Policy on Student Misconduct: Plagiarism and Cheating at <https://www.nwpolytech.ca/about/administration/policies/index.html>

**Note: all Academic and Administrative policies are available on the same page.