LEGAL OFFICE PROCEDURES
Course Syllabus

Course Number: ADMM-A0089  OHLAP Credit: No
OCAS Code: None
Course Length: 180 Hours
Career Cluster: Business, Management & Administration
Career Pathway: Administrative & Information Support
Career Major(s): Legal Office Assistant

Pre-requisite(s): Foundations for the Legal Office

Course Description: This course builds upon Foundations for the Legal Office and includes important soft skills, including ethics and communication, to be successfully employed in a legal office. This course will provide students with the concepts, principles, and attitudes needed to understand how a legal office is operated and managed in a rapidly changing global environment.


Course Objectives:

A. Ethics in the Legal Profession
1. Avoid the appearance of impropriety.
2. Deal with confidential information.
3. Explain attorney-client privilege.
4. Preserve the identity of funds and property of clients.
5. Promote confidence in the legal profession.
6. Support integrity in the legal profession.
7. Explain what constitutes the unauthorized practice of law.
8. Problem solve situations with conflicts of interest.

B. Office Structure and Staffing
1. Explain the duties and responsibilities of the legal professional.
2. Identify the classification of lawyers.
3. Explain the differences and similarities between a paralegal and a legal professional, legal teams, and types of law practices.
4. Demonstrate the ability to establish priorities and the need to meet deadlines.
5. List procedures and resources for making travel arrangements.
6. Be familiar with professional organization for legal assistants.
7. Identify the role and duties of a Notary Public and the process for becoming a Notary in Oklahoma.

C. Mail and Docket Control
1. Explain how to process incoming and outgoing mail.
2. Demonstrate familiarity with delivery and mailing services.
3. Keep accurate appointments, deadlines, and reminders.
4. Utilize appropriate software to manage email, calendars, tasks, and contacts.¹
5. Track receipt of documents and calculate deadlines.¹
6. Be familiar with court rules and statutes of limitations.¹

D. Appropriate Communication Techniques¹
1. Demonstrate courtesy.¹
2. Explain and apply the importance of first impressions.¹
3. Use an e-mail system appropriately; write and format e-mails correctly.¹
4. Correctly write and format legal documents.¹
5. Use appropriate titles when meeting or introducing others.¹
6. Define and demonstrate appropriate listening skills (active vs. passive listening).¹
7. Identify barriers to effective communication.¹
8. Demonstrate appropriate customer service skills.¹

E. Telephone Etiquette¹
1. Identify common barriers to open communication.¹
2. Identify appropriate customer care representative behaviors.¹
3. Distinguish between idle conversation and dialogue.¹
4. Demonstrate ability to determine customer expectations.¹
5. Demonstrate ability to use fact-finding techniques.¹
6. Demonstrate proper phone etiquette and techniques.—conference calls, voice mail, pagers, video conferencing, transferring calls, ending calls, taking messages, screening calls, hold, cell phones.¹
7. Demonstrate proper technique for beginning and ending calls.¹
8. Identify methods for showing customer empathy.¹
9. Identify methods to build customer goodwill.¹
10. Demonstrate methods for dealing with difficult callers.¹
11. Describe the importance of behavioral styles as it applies to telephone techniques.¹
12. Define and describe the following types of telephone equipment: speaker phone, multi-line phones, conference calls, video conference calls, wireless communication devices.¹
13. Define branding.¹
14. Define customer service effectiveness.¹
15. Define screening calls.¹
16. Define the phrase "our customers are blind."¹
17. Demonstrate fact-finding techniques.¹
18. Differentiate when to use open and closed-ended questions.¹
19. Model positive impression using proper communication techniques.¹
20. Demonstrate proper word choice when dealing with customers.¹
21. Demonstrate proper techniques when transferring calls.¹
22. Demonstrate appropriate voice quality.¹
23. Define the four standard behavioral styles: decisive, inquisitive, rational, and expressive.¹
24. Describe the components of an ideal customer service environment.¹
25. Demonstrate techniques for handling difficult customers.¹
26. Define the following listener types: active, passive, cohesive, constructive, and emotive.¹
27. Demonstrate the ability to listen for meaning.¹
28. Define the following barriers to effective listening: psychological, social, sensory, organizational, emotional, bias, difficult customer, physical, preoccupation, and hearing loss.¹

F. Law Office Accounting¹
1. Define accounting terminology and utilize procedures.¹
2. Explain procedures for depositing funds.¹
3. Know the different kinds of check endorsements.1
4. Differentiate between firm bank accounts and trust bank accounts.1
5. Explain how to keep activity registers, time sheets, diaries, etc.1
6. Monitor cash flow and accounts receivable.1
7. Manage budgets and expenses.1
8. Explain the process for stopping payment on checks.1
9. Explain the use of special checks: bank drafts, cashier's check, certified checks.1

G. Billing and Timekeeping1
1. Define and apply legal fee agreements.1
2. Manage reports.1
3. Process timekeeping and billing cycles.1
4. Apply appropriate timekeeping system/software.1

H. Information Systems1
1. Utilize appropriate application software.1
2. Identify system hardware and equipment.1
3. Be familiar with network security and policies.1
4. Use electronic research systems.1

I. File and Library Management1
1. Apply file management policies and ethics implications.1
2. Become familiar with file systems and methods.1
3. Update law books with inserts and pocket parts.1
4. Maintain the law library.1

J. Office Equipment1
1. Demonstrate familiarity with copiers, fax machines, scanners, dictation equipment, filing equipment, and postage meters.1

1ODCTE objective

Teaching Methods: The class will primarily be taught by the lecture and demonstration method and supported by various media materials to address various learning styles. There will be question and answer sessions over material covered in lecture and media presentations. Supervised lab time is provided for students to complete required projects.

Grading Procedures: 1. Students are graded on theory and shop practice and performance.
2. Each course must be passed with seventy percent (70%) or better.
3. Grading scale: A=90-100%, B=80-89%, C=70-79%, D=60-69%, F=50-59%.

Description of Classroom, Laboratories, and Equipment: Tulsa Technology Center campuses are owned and operated by Tulsa Technology Center School District No. 18. All programs provide students the opportunity to work with professionally certified instructors in modern, well-equipped facilities.

Available Certifications/College Credit: The student may be eligible to take state, national or industry exam after completion of the program. College credit may be issued from Oklahoma State University-Okmulgee or Tulsa Community College. See program counselor for additional information.
College Credit Eligibility: The student must maintain a grade point average of 2.0 or better.