

## Legal Administrative Assistant DACUM

Robert Cordingley and Kristen Cameron (April 9)

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### DACUM Skill Rating Scale

- 1 - Can perform some parts of this skill satisfactorily but requires assistance and/or supervision to perform the entire skill.
- 2 - Can perform this skill satisfactorily but requires periodic assistance and/or supervision.

- 3 - Can perform this skill competently without assistance or supervision.
- 4 - Can perform this skill competently with more than acceptable speed and/or quality and can teach the skill to others.

<b>DEMONSTRATE PROFESSIONALISM</b> A	Maintain personal hygiene	Maintain professional dress	Maintain professional standards	Respect others	Empathize	Demonstrate work ethic
	A1	A2	A3	A4	A5	A6
	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
	Follow instructions	Accept mentoring	Accept feedback	Take ownership for your work	Learn from mistakes	Demonstrate accuracy
	A7	A8	A9	A10	A11	A12
	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
	Demonstrate adaptability / flexibility	Demonstrate reliability	Demonstrate integrity	Take initiative	Display confidence	Manage time
	A13	A14	A15	A16	A17	A18
	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
	Prioritize	Apply organizational skills	Take notes	Work on teams	Deal with difficult people	Work independently
	A19	A20	A21	A22	A23	A24
	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
	Anticipate lawyer needs	Maintain life / work balance	Read updates (land titles, court offices)	Participate in upgrading courses	Work within legal processes for different areas of law including corporate/commercial, real estate, family, civil litigation, wills & estates, criminal	
	A25	A26	A27	A28	A29	
	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	

DEMONSTRATE  
COMMUNICATION  
SKILLS  
B

Interact w ith clients B1	Interact w ith law yers B2	Interact with co- w orkers B3	Review (explain) documents w ith clients B4	Listen B5	Ask clarifying questions B6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Solve problems B7	Use legal terminology B8	Apply telephone etiquette B9	Apply email etiquette B10	Give constructive feedback B11	
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	

PERFORM GENERAL  
OFFICE DUTIES  
C

Prepare packages for courier C1	Use various postal methods (e.g. registered, priority, express, etc.) C2	Screen / direct calls, mail, etc. C3	Prepare meeting rooms C4	Set up conference calls C5	File documents outside office C6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Follow safety and security procedures C7	Make deliveries C8	Order supplies C9	Research prices C10	Arrange for repairs C11	Participate in development of marketing materials (e.g. brochures) C12
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Clean office C13					
1   2   3   4					

USE TECHNOLOGY  
D

Keyboard	Word process	Use spreadsheets	Use presentation software	Use email	Use scheduling software
D1	D2	D3	D4	D5	D6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Maintain client contact database	Use internet	Use online databases	Use legal accounting software	Use document management systems	Contribute to development / testing of new / specialized software
D7	D8	D9	D10	D11	D12
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Use printer / copier / scanner	Use phone system	Use fax	Set up media equipment	Use postage meter	Use binding machine
D13	D14	D15	D16	D17	D18
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Use typewriter					
D19					
1   2   3   4					

PERFORM SCHEDULING / PLANNING DUTIES  
E

Book appointments	Book services (e.g. court reporter, process servers)	Schedule court dates	Book professional development for self / lawyers	Book facilities	Arrange catering
E1	E2	E3	E4	E5	E6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Schedule to meet deadlines	Arrange travel	Plan office retreats / parties / charity drives			
E7	E8	E9			
1   2   3   4	1   2   3   4	1   2   3   4			

DEVELOP LEGAL  
DOCUMENTS  
F

Draft letters / emails F1	Draft documents F2	Complete standard forms including for: corporate / commercial, real estate, family, wills & estates, civil litigation, criminal F3	Transcribe digital recordings F4	Proofread / edit F5	Use punctuation F6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Use Canadian grammar F7	Use Canadian spelling F8	Format documents (e.g. table of contents, page and paragraph numbers) F9	Create tables F10	Prepare document books F11	Prepare minute books F12
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Create precedents F13	Maintain precedents (keep up to date) F14	Draft digital multimedia presentations F15			
1   2   3   4	1   2   3   4	1   2   3   4			

MANAGE  
DOCUMENTS  
G

Use document management procedures G1	Manage document versions G2	Follow file naming conventions G3	Apply precedent etiquette ("save as") G4	Track changes G5	Digitize documents G6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Maintain digital document security G7					
1   2   3   4					

MAINTAIN FILES  
H

Set up file organization system	Determine paper copies to keep consistent with lawyer preference	Determine when to move a file to archives	Determine which documents to destroy	Maintain file lists (e.g. open, closed and archived)	Maintain checklists for files
H1	H2	H3	H4	H5	H6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Document verbal correspondence (memo to file)	Determine file set up procedure	Determine labeling practice	Diarize (file status, limitation dates, possession dates, hearing dates)	Track delivery status	
H7	H8	H9	H10	H11	
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	

PERFORM DUE DILIGENCE  
I

Determine due diligence searches required	Request paper due diligence searches (by letter)	Conduct online due diligence searches (e.g. title, PPR, companies office, tax, court registry)	Interpret due diligence search results	Track searches	Conduct legal research
I1	I2	I3	I4	I5	I6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4

COMPLY WITH LAWS, REGULATIONS AND POLICIES  
J

Maintain confidentiality	Work within limitations of role (e.g. reviewing documents with clients vs. advising)	Conduct conflict searches	Comply with judicial acts and rules	Comply with Law Society rules	Comply with trust account rules
J1	J2	J3	J4	J5	J6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Comply with identification verification rules	Comply with office policies and procedures	Comply with document filing / serving requirements			
J7	J8	J9			
1   2   3   4	1   2   3   4	1   2   3   4			

FOLLOW  
ACCOUNTING  
PROCEDURES  
K

Open files	Track time	Track disbursements	Prepare invoices	Requisition cheques	Report on trust accounts
K1	K2	K3	K4	K5	K6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Pay invoices	Prepare deposits	Process payments (e.g. credit card, cash, debit, certified cheque)	Close files	Reconcile monthly bank statements	Have cheques certified
K7	K8	K9	K10	K11	K12
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Maintain petty cash	Prepare files for audit				
K13	K14				
1   2   3   4	1   2   3   4				

PERFORM HUMAN  
RESOURCE DUTIES  
L

Participate in recruitment	Participate in interview / selection process	Supervise staff	Mentor staff (formal or informal)	Delegate work	Assess performance
L1	L2	L3	L4	L5	L6
1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4	1   2   3   4
Perform yearly review with staff / lawyer	Prepare payroll	Complete records of employment			
L7	L8	L9			
1   2   3   4	1   2   3   4	1   2   3   4			