

Legal Admin Specialist 1B: Taking Care of the Legal Office

Wherever your legal admin career takes you, understanding the responsibilities of a law office requires strict attention to detail, communication skills, office competence, and legal savvy. What does a legal admin need to know and what duties do they perform? How do confidentiality, cybersecurity, and client relations look different in a legal office? Learn the answers to these questions and so much more for this exciting career with endless opportunities to prove your value, learn, and grow.

Companion courses listed at the bottom.

Unit 1: Legal Office Administration

We are now going to take a deep dive into the operation of a law office. What does it mean to be responsible for administration of an entire practice full of attorneys and other staff? There are many opportunities to educate yourself about the practice of managing employees and the various laws that govern employers and employees. Let's examine the pillars of employment law and develop an understanding of the process involved in recruiting and hiring key staff members.

What will you learn in this unit?

1. Articulate the differences between a transactional law firm and a litigation firm
2. Understand how to separate client retainer fees into an IOLTA
3. Conduct an employee performance review
4. Identify whether your office is subject to specific federal employment laws and how to comply with each one

Unit 2: Docket Control

Lawsuits live and die by their deadlines. The client may have the best case in the world and be on the verge of winning a million-dollar verdict—but what happens if the attorney doesn't file the complaint before the statute of limitations runs out? The client's case is thrown out. And do you know what happens next? That same client will turn around and sue the attorney for malpractice. Managing the docket and calendar system is essential work for every legal practice.

What will you learn in this unit?

1. Explain the importance of docket control in a law firm
2. Choose an appropriate calendar system for any office where you might work
3. Calculate deadlines by using local court rules
4. Manage office mail effectively and efficiently
5. Place and receive conference calls

Unit 3: Wills, Bills and Much More: Special Documents

When you picture a lawyer at work, what do you see? Most people imagine lawyers are always in the courtroom, arguing cases to a judge and jury. In reality, lawyers spend the majority of their time in the office preparing paperwork, doing research, and talking with clients. The American Bar Association estimates that only 1–2 percent of cases ever go to trial. There are also many different areas of the law that don't involve going to court at all. Some lawyers help clients in other ways, such as with buying and selling real estate or forming new businesses. In each case, administrative assistants play a key part in creating the paperwork behind the scenes for the attorney's review.

What will you learn in this unit?

1. Identify the elements of every legally enforceable contract
2. Explain the basic types of “advanced directives”
3. Form a new business entity
4. Describe the difference between a divorce and a dissolution
5. Assist with preparation of an Answer to Plaintiff’s Complaint

Unit 4: Client Relations 101

At the heart of every law practice is the relationship between the attorney and their client. Lawyers must meet each client’s legal needs in addition to satisfying the client’s personal expectations. It’s similar to every other type of business that must appeal to their customers and keep them happy. But for lawyers, this is also tempered by ethical constraints. There are times when the lawyer-client relationship becomes strained. Do you know how to manage a disgruntled client, or to terminate a relationship that has soured? It is critical to understand how to manage the client’s expectations and balance them against the attorney’s ethical obligations to their client, which becomes very challenging when the client is dissatisfied. This unit will examine the different skills you may need to draw on when dealing with a challenging client relationship.

What will you learn in this unit?

1. Collect the necessary information from the client in order to identify the legal issues that need to be addressed
2. Determine whether your firm is competent to handle a case
3. Navigate a difficult conversation with an unhappy client
4. Identify the ethical rules that provide the framework for client communication

Unit 5: The Financial Factors

Law firms have some unique features, especially when it comes to billing the clients. However, many of the financial aspects of operating a law firm are similar to most other types of businesses. The goal of every business is to serve the customer *or client*

and make money. In order to do this, it’s important to understand how to manage client invoices and use financial reports to track the financial strength of the firm.

What will you learn in this unit?

1. Describe the various types of legal fees
2. Understand the time-tracking process and explain the difference between billable time and nonbillable time
3. Properly bill each client for legal fees at the appropriate time
4. Explain the ins and outs of a lawyer’s trust account
5. Identify various financial reports and conduct a bank reconciliation of the cash accounts

Unit 6: Technology in the Legal Office

Technology is a cornerstone of every modern law practice. Tasks that used to be done manually, in person—such as filing documents with the court—have now been simplified and are often done online. That’s one of many reasons why legal administrative assistants need to understand the basic pieces of technology used in every law office. This ranges from understanding the equipment itself to figuring out the various software used

to help every assistant be more efficient and productive on the job. More than simplifying day-to-day responsibilities, understanding all aspects of law office technology can help a legal assistant participate in creating cybersecurity policies in the office that help protect against loss of every client's sensitive data.

What will you learn in this unit?

1. Understand what equipment is necessary to set up a law office
2. Identify the basic software used by attorneys and legal teams in a law practice
3. Use a court's electronic filing system for litigation matters
4. Assist in developing procedures for network security in the office

Unit 7: Legal Rules About Practice and Procedure

In the real estate business, there is an old adage defining the key aspect of all property: location, location, location. In the legal profession, this translates to: rules, rules, rules. There are rules of law argued by lawyers and applied by courts. There are rules regulating the behavior and practice of attorneys. And there are rules of each court governing practice and procedure in the courtroom. Let's break it down and take a close look at some of the rules that provide the structure of the legal profession and courtroom practice.

What will you learn in this unit?

1. Identify permissible language for a legal advertisement
2. Explain how to become a Florida Registered Paralegal
3. Define the "real party in interest" rule
4. Name three items that must be disclosed to opposing counsel before trial

Unit 8: Career Central: Work-Based Learning and Certification

The top tier of legal administrative professionals usually has earned specific credentials, or letters behind their name. These credentials signify a true commitment to excellence in the profession. Becoming a certified paralegal demonstrates that you have significant work experience and have studied the law in depth. Learning on the job and in the classroom are key components of working toward the "Certified Paralegal" title.

What will you learn in this unit?

1. Describe the requirements for becoming a certified paralegal
2. Explain the benefits of job shadowing
3. Identify and locate an appropriate work-based learning experience
4. Use a variety of testing skills and strategize for successfully completing a certification exam

Companion courses:

Business Law

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