

Appendix 2 - Guidance for Learners

The following are general instructions which should be followed alongside any specific instructions for each assignment.

- Before you start the assignment you should read the assignment text carefully. This will help you to understand how each task fits into the whole assignment.
- You should start each task on a fresh sheet of paper.
- On each sheet of paper you should type or write your name and registration number. Also add an appropriate name to your saved file or as instructed in the task.
- You are expected to check and correct your spelling, grammar and punctuation.
- You may use any books, notes or other material to help you, but you must not copy word-for-word from any source. Under no circumstance must you copy someone else's work.
- You and your assessor must sign each Assessment Record to verify that all the work contained in that assignment is your own.
- When all required assignments and the multiple-choice test have been completed to the required standard you will be awarded the Level 2 Certificate / Diploma for Legal Secretaries (or alternative for Level 2 Awards), whichever is applicable to your centre's programme.

Policy for appeals

The CILEx Appeals policy can be found on the [CILEx website](#).

Setting the Scene

Legal Secretaries Certificate/Diploma and Legal Information Processing assignment

The aim of the assignments is to demonstrate the candidate's ability to carry out legal word processing, administration and information processing tasks in a legal setting.

In all the assignments you will be working for the same firm that you have been with throughout your coursework book: **INGRAM LOCHEE & EXTON**, solicitors. As you know, they are a rapidly expanding firm occupying a five-storey office block in the centre of Birmingham. The firm is divided into three main departments: Probate (with a sub-division of Family), Criminal Litigation (sub-division Civil Litigation) and Corporate (sub-division Conveyancing). Each department is in the charge of one of the Partners and is situated on a separate floor. Reprographics, post room, switchboard etc are on the ground floor and interview rooms, staff canteen and rest room on the top floor. As part of the firm's policy, you may be requested to work in any department either on a short-term or a long-term basis.

Students following the Diploma course should be aware that Ingram Lochee & Exton has expanded and has opened new offices in Dartford, Kent. This is a thriving area of the country, close to London, and within the Thames Gateway. The main offices of Ingram Lochee & Exton are still based in Temple Row, Birmingham.

Opening hours

Offices are open 8.00 am - 6.00 pm Monday to Friday. However, staff are contracted to work a 35 hour week with one hour for lunch; most of the administration staff start at 9.00 am.

Holiday entitlement

Holidays run from 1st January - 31st December each year

- Basic entitlement for all secretaries and administration staff is 20 days per year excluding bank holidays.
 - After two years' service, junior secretaries, secretaries and all administration staff receive an extra day and a further day for each additional year up to a maximum of three additional days.
- Senior secretaries receive a maximum of five additional days.
- Solicitors and Chartered Legal Executives start on 25 days and receive a maximum of five additional days.
- Partners receive 35 days.

Valerie Ingram (Probate), Nishad Lochee (Criminal Litigation) and James Exton (Corporate) are the partners. There are 18 solicitors and three FCILEx. (Fellows of the Chartered Institute of Legal

Executives) as shown in the Organisation Chart which you should *study carefully* before you start work on the assignments.

There is a team of 15 secretarial/administrative staff working directly for the 24 fee earners:

- *three senior legal secretaries* who all have the City & Guilds/CILEx Level 3 Diploma for Legal Secretaries and many years' experience. These three are the Partners' secretaries, and so they have varied duties in addition to their legal secretarial role. When time allows, however, they work for any of the solicitors in their department.
- *six legal secretaries* who all have the City & Guilds/CILEx Level 2 Certificate for Legal Secretaries and are working towards the City & Guilds/CILEx Level 3 Diploma for Legal Secretaries on a day-release course at the local college.
- *three junior legal secretaries* who either have, or are about to achieve, the City & Guilds/CILEx Level 2 Certificate for Legal Secretaries, but are less experienced
- *three administrative assistants*, who are taking the City & Guilds/CILEx Level 2 Certificate for Legal Secretaries at evening class.

There are other administrative staff in the Post Room, Photocopying Room, Switchboard, Reception etc.

INGRAM LOCHEE & EXTON

PARTNERS

Valerie Ingram LLB

Nishad Lochee LLB

James Exton LLB

18 Temple Row

BIRMINGHAM

B2 5DS

DX: 13853 Birmingham -1

Tel: 0121 230 4932

Fax: 0121 230 4933

EMail: cilexpt.co.uk

(not for service)

INGRAM LOCHEE & EXTON

PARTNERS

Valerie Ingram LLB

Nishad Lochee LLB

James Exton LLB

20 Home Gardens

DARTFORD

DA1 2RS

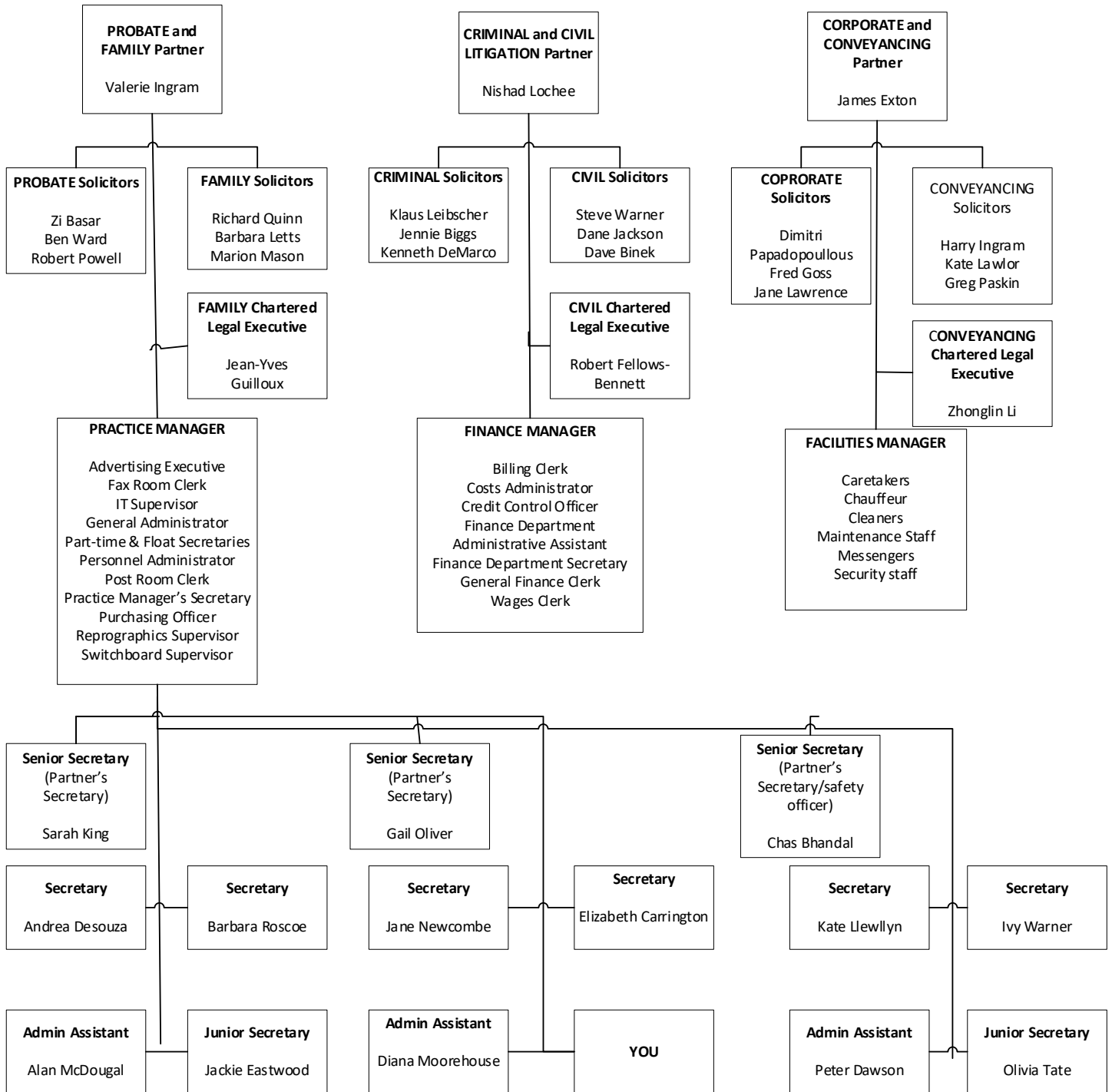
DX: 13876 Dartford -1

Tel: 01322 627 601

Fax: 01322 627 842

EEmail: CILExptdart.co.uk
(not for service)

INGRAM LOCHEE & EXTON – Organisation Chart



Example of house style for letters

INGRAM LOCHEE & EXTON

PARTNERS

Valerie Ingram LLB
Nishad Lochee LLB James
Exton LLB

**18 Temple Row
BIRMINGHAM B2
5DS**

DX: 13853 Birmingham 1

Tel: 0121 230 4932

Fax: 0121 230 4933

Email: cilexpt.co.uk

Our ref NL/AS/BOLTON

10 June 20** URGENT *(if instructed)* The

Chief Constable
Yorkshire Constabulary
YORK YR3 2ET

Dear Sir

MICHAEL BOLTON 14 NORTH STREET BIRMINGHAM

We act for the above named who was involved in a road traffic accident on the A38 near Bromsgrove on 20 August.

The other party involved was Mr D Hughes of 36 Gleneagles Road Blackpool.


Would you please let us have a copy of the police report together with a note of your costs. We enclose a stamped addressed envelope for your early reply.

Yours faithfully
INGRAM LOCHEE & EXTON

Nishad Lochee
Partner Enc

Copy to: Mr M Bolton

Email template

 Message (HTML)

File Edit View Insert Format Tools Actions Help

From...

To...

Cc...

Subject:

Examples of Jurat and Common Clauses

Jurat

SWORN by	ANGELA JANE DUTTON				
at					
this		day of		20**	

Before me

(NAME)
A Commissioner for Oaths/Solicitor

Concluding Words

IN WITNESS whereof the parties hereto have hereunto set their hands the day and year first hereinbefore written

Attestation Clause

SIGNED AS A DEED by the said	(NAME)
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INGRAM LOCHEE & EXTON

Staff List and Internal Telephone Directory Birmingham Office				
Last Name	First Name	Designation	Department	Extn no
Basar	Zi	Solicitor	Probate	100
Bhandal	Chas	Snr Sec	Corporate	101
Biggs	Jennie	Solicitor	Crim Lit	102
Binek	Dave	Solicitor	Civil Lit	103
Carrington	Elizabeth	Secretary	Crim Lit	104
Dawson	Peter	Admin Asst	Corporate	105
DeMarco	Kenneth	Solicitor	Crim Lit	106
Desouza	Andrea	Secretary	Probate	107
Eastwood	Jackie	Jnr Sec	Probate	108
Exton	James	Partner	Corporate	109
Fellows-Bennett	Robert	FCILEx	Civil Lit	110
Goss	Fred	Solicitor	Corporate	111
Guilloux	Jean-Yves	FCILEx	Family	112
Harper	Simon	Manager	Facilities	113
Ingram	Harry	Solicitor	Conveyancing	114
Ingram	Valerie	Partner	Probate	115
Jackson	Dane	Solicitor	Civil Lit	116
King	Sarah	Snr Sec	Probate	117
Lawlor	Kate	Solicitor	Conveyancing	118
Lawrence	Jane	Solicitor	Corporate	119
Leibscher	Klaus	Solicitor	Crim Lit	120
Letts	Barbara	Solicitor	Family	121
Li	Zhonglin	FCILEx	Conveyancing	122
Llewellyn	Kate	Secretary	Corporate	123
Lochee	Nishad	Partner	Crim Lit	124
McDougal	Alan	Admin Asst	Probate	125
Mason	Marion	Solicitor	Family	126
Moorehouse	Diana	Admin Asst	Crim Lit	127
Newcombe	Jane	Secretary	Crim Lit	128
Newton	Abigail	Manager	Practice Manager	129
Oliver	Gail	Snr Sec	Crim Lit	130
Papadopoullous	Dimitri	Solicitor	Corporate	131
Paskin	Greg	Solicitor	Conveyancing	132
Powell	Robert	Solicitor	Probate	133
Quinn	Richard	Solicitor	Family	134
Roscoe	Babs	Secretary	Probate	135
Tate	Olivia	Jnr Sec	Corporate	136
Walker	Gregory	Manager	Finance	137
Ward	Ben	Solicitor	Probate	138
Warner	Ivy	Secretary	Corporate	139
Warner	Steve	Solicitor	Civil Lit	140
<i>Student</i>	<i>You</i>	<i>(Jnr) Secretary</i>	<i>---</i>	<i>141</i>

INGRAM LOCHEE & EXTON

Staff List and Internal Telephone Directory				
Dartford Office				
Last Name	First Name	Designation	Department	Extn no
Begum	Silpi	FCILEx	Conveyancing	200
Dawson	Brian	Solicitor	Family	201
Exton	James	Partner	Corporate	109
Ingram	Valerie	Partner	Probate	114
Lochee	Nishad	Partner	Crim Lit	123
Moore	Lawrence	Admin Asst	Conveyancing	202
Neilson	Samantha	Jnr Sec	Family	203
Ratcliffe	Elizabeth	Solicitor	Probate	204
Rushton	Donna	Snr Sec	Probate	205
Wilkes	David	Solicitor	Conveyancing	206
<i>Student</i>	<i>You</i>	<i>Secretary</i>	---	<i>207</i>

Glossary of terms used in the assignments

Terms	Description
Briefing notes	relate to a specific scenario, headed, identify key issues, summarise legal points relating to those issues.
Set of notes/revision notes/research notes	use sub-headings, summarise important principles for ease of reference.
Presentation notes/materials	summarises key points, may use bullet points, may use presentation slides which may include images or graphics.
Hand-out/factsheet/information sheet	factual, primarily text, informative, uses sub-headings, usually on A4 or A5 sized paper.
Leaflet	informative, may contain graphics or images, can be A4 or A5, may include examples or scenarios, question and answer or real cases by way of explanation.
Written summary	short continuous prose which will usually focus on a specific issue.

ATTENDANCE NOTE

Client Name		Fee Earner	
Date		Time	Time Engaged

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