

**BOT 156 Course Outline as of Fall 2021****CATALOG INFORMATION**

Dept and Nbr: BOT 156 Title: LEGAL OFFICE PROCEDURES

Full Title: Legal Office Procedures

Last Reviewed: 3/25/2013

Units		Course Hours per Week		Nbr of Weeks	Course Hours Total	
Maximum	3.00	Lecture Scheduled	3.00	17.5	Lecture Scheduled	52.50
Minimum	3.00	Lab Scheduled	0	6	Lab Scheduled	0
		Contact DHR	0		Contact DHR	0
		Contact Total	3.00		Contact Total	52.50
		Non-contact DHR	0		Non-contact DHR	0

Total Out of Class Hours: 105.00

Total Student Learning Hours: 157.50

Title 5 Category: AA Degree Applicable

Grading: Grade Only

Repeatability: 00 - Two Repeats if Grade was D, F, NC, or NP

Also Listed As:

Formerly:

**Catalog Description:**

Training in law office procedures with emphasis on preparation of non-court documents such as wills, agreements, real estate and corporation papers, with an introduction to family law and criminal law. Course includes managing legal files, telephone techniques, processing mail, and other administrative tasks relative to a law firm. Confidentiality, legal ethics, and professionalism will be enforced throughout the course. Students will create sample client files and develop a legal procedures manual that can be used as a guide when working in a law office.

**Prerequisites/Corequisites:****Recommended Preparation:**

Eligibility for ENGL 100 or ESL 100 AND Course Completion of CS 60.11A AND Course Completion of BGN 71

**Limits on Enrollment:****Schedule of Classes Information:**

Description: Training in law office procedures with emphasis on preparation of non-court documents such as wills, agreements, real estate and corporation papers, with an introduction to

family law and criminal law. Course includes managing legal files, telephone techniques, processing mail, and other administrative tasks relative to a law firm. Confidentiality, legal ethics, and professionalism will be enforced throughout the course. Students will create sample client files and develop a legal procedures manual that can be used as a guide when working in a law office. (Grade Only)

Prerequisites/Corequisites:

Recommended: Eligibility for ENGL 100 or ESL 100 AND Course Completion of CS 60.11A AND Course Completion of BGN 71

Limits on Enrollment:

Transfer Credit:

Repeatability: Two Repeats if Grade was D, F, NC, or NP

## **ARTICULATION, MAJOR, and CERTIFICATION INFORMATION:**

<b>AS Degree:</b>	<b>Area</b>	Effective:	Inactive:
<b>CSU GE:</b>	<b>Transfer Area</b>	Effective:	Inactive:
<b>IGETC:</b>	<b>Transfer Area</b>	Effective:	Inactive:
<b>CSU Transfer:</b>		Effective:	Inactive:
<b>UC Transfer:</b>		Effective:	Inactive:

**CID:**

**Certificate/Major Applicable:**

Certificate Applicable Course

## **COURSE CONTENT**

**Student Learning Outcomes:**

Upon completion of the course, students will be able to:

1. Define and interpret legal terminology.
2. Open, manage, and close client files.
3. Develop and maintain a legal procedures manual to include samples of properly formatted legal documents and instructions for processing the documents.

**Objectives:**

Upon completion of the course, students will be able to:

1. Discuss client confidentiality and how it is applied in a law office.
2. Write and construct appropriate email communication.
3. Critique proper telephone techniques for law offices.
4. Apply appropriate calendaring and tickle procedures.
5. Open, organize, and maintain client files.
6. Properly format legal correspondence.
7. Prepare legal correspondence.
8. Discuss the role, duties and responsibilities of a notary public.
9. Examine the differences between affidavits and acknowledgments and properly format each in legal documents.
10. Discuss the historical aspects of marriage.
11. Explain the differences between a valid, void, and voidable marriage.

12. Discuss the procedures for a dissolution of marriage.
13. Explain the difference between community property and separate property.
14. Describe domestic partnerships.
15. Compare and contrast the differences between a guardianship and conservatorship.
16. List the different kinds of adoptions.
17. Explain the nature and purpose of estate planning.
18. Evaluate the formalities and requirements for making a Will.
19. Discuss the various types of Wills.
20. Prepare a Will applying basic guidelines for development and procedures for signing.
21. Create a codicil and explain when it is used.
22. Compare the differences between testamentary trust and living (inter vivos) trust.
23. Determine the procedures in processing a probate.
24. Discuss the advantages and disadvantages of sole proprietorships, partnerships, corporations,  
and limited liability companies.
25. List the steps involved in starting a corporation and prepare basic corporate legal documents.
26. Prepare a simple general partnership agreement.
27. Discuss the history of the ownership of property in the United States.
28. Describe the difference between real and personal property.
29. Prepare a promissory note.
30. Explain the methods of determining a legal description for property.
31. List the different types of deeds and leases.

### **Topics and Scope:**

1. Law office administrative responsibilities and duties
  - a. Roles and responsibilities of legal professionals
  - b. Confidential relationships
  - c. Legal terminology
  - d. Telephone skills
  - e. Calendaring
  - f. Billing procedures
  - g. Filing systems
2. Communication
  - a. Email
  - b. Faxes
  - c. Telephone systems
  - d. Specialized software and networks
3. Legal correspondence
  - a. Memos and letters
  - b. Dictation
  - c. Mail procedures
4. The Notary Public
  - a. Legal requirements for certification
  - b. Signing and processing legal documents
  - c. Affidavits
  - d. Acknowledgements
5. Family Law
  - a. Marriage
  - b. Dissolution of marriage
  - c. Community property and quasi-community property

- d. Domestic relationships
- e. Adoption
- f. Guardianships and conservatorships
- 6. Wills, trusts and probate
  - a. Estate planning
  - b. Formalities of making a Will
  - c. Types of Wills
  - d. Procedures for signing and processing Wills
  - e. Codicils
  - f. Probate proceedings
- 7. Business organizations
  - a. Forms of business ownership
  - b. Corporations
  - c. Partnerships
  - d. Limited liability companies
- 8. Real estate transactions
  - a. Classifications of property
  - b. Property descriptions
  - c. Ownerships of property
  - d. Real estate transactions
  - e. Deeds
  - f. Leases
  - g. Eviction proceedings and unlawful detainer

**Assignment:**

1. Weekly reading assignments of 30-40 pages from textbook and Web resources.
2. Formatting and processing 10-15 legal documents and correspondence.
3. Opening and maintaining 4-6 client files.
4. Legal procedures manual from activities and projects to include written instructions and samples of work (approximately 6 to 10 instructions and samples).
5. Quizzes and tests on textbook readings (approximately 8 to 10 tests).

**Methods of Evaluation/Basis of Grade:**

**Writing:** Assessment tools that demonstrate writing skills and/or require students to select, organize and explain ideas in writing.

Correspondence, legal documents, and written instructions and procedures.
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Writing 10 - 30%
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**Problem Solving:** Assessment tools, other than exams, that demonstrate competence in computational or non-computational problem solving skills.

Legal procedures manual and client files
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Problem solving 10 - 40%
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**Skill Demonstrations:** All skill-based and physical demonstrations used for assessment purposes including skill performance exams.

Formatting and processing legal documents

Skill Demonstrations  
20 - 40%

**Exams:** All forms of formal testing, other than skill performance exams.

Quizzes or Exams: multiple choice, true/false, matching items, completion

Exams  
5 - 15%

**Other:** Includes any assessment tools that do not logically fit into the above categories.

Attendance and participation

Other Category  
5 - 10%

**Representative Textbooks and Materials:**

Legal Secretarial Procedures, 7th edition, by Joyce Morton, Prentice-Hall, 2010.

Law Office Procedures Manual by Legal Secretaries Incorporated,  
The Rutter Group, binder format updated with changes in law every six months