

## **COURSE OUTLINE**

### **Advanced Document Processing: Legal**

#### **Course Description**

BE 106. Advanced Document Processing: Legal. 3 hours credit. Prerequisite: BE 102 and BE 204 with a C or better and a keyboarding speed of at least 50 wpm. This course will enable the student to be familiar with legal forms and terminology which include real estate and property transfers, litigation, wills and estates, and corporate documents. Additional areas of concentration consist of proper grammar, punctuation, spelling, capitalization, as well as speed and accuracy.

#### **Course Relevance**

The applications learned in this course will allow the student to effectively utilize current word processing software to format a variety of legal documents. The student will learn to maintain client files and billing sheets in an organized and appropriate fashion.

#### **Required Materials**

Namanny, Mueller, and DuPree, (1998). *Legal office procedures* (3rd ed.).  
Cincinnati, OH: South-Western Publishing Company.

The student is required to purchase a flash drive (128mb or larger) to save data files

#### **Learning Outcomes**

The intention is for the student to be able to

1. Demonstrate a minimum keyboarding speed of 65 words per minute on five minute timings with five errors or less
2. Use word processing features to complete tasks with the appropriate legal terminology and formatting

#### **Primary Learning PACT Skills that will be DEVELOPED and/or documented in this course**

Through the student's involvement in this course, he/she will develop his/her ability in the following primary PACT skill areas:

1. Computer Literacy:
  - The student will utilize software to manipulate legal forms and templates.
2. Field-Related Technology:
  - Through completion of a variety of projects, the student will demonstrate skills appropriate to any entry-level legal career field.

Secondary skills (developed but not documented):

Time Management  
Critical Thinking  
Problem Solving

Reading  
Listening

### **Major Summative Assessment Task(s)**

These learning outcomes and primary Learning PACT skills will be demonstrated by

1. Creating and developing a collection of error-free legal documents into a working professional portfolio
2. Developing a portfolio to map improvement of keyboarding techniques with a minimum of 65 wpm, and decreased error ratio through utilization of diagnostic software

### **Course Content**

- I. Themes - Key recurring concepts that run throughout this course:
  - A. Formatting and design
  - B. Spelling, grammar, and proofreading
  - C. Proper use of software features
  - D. Developing greater speed and accuracy
- II. Issues - Key areas of conflict that must be understood in order to achieve the intended outcome:
  - A. Developing proper document formatting and editing in a timely manner
  - B. Utilizing accurate software features
  - C. Improving speed and accuracy
- III. Concepts – Key concepts that must be understood to address the issues:
  - A. Reading comprehension
  - B. Task completion
  - C. Practice proper keyboarding techniques
- IV. Skills/Competencies - Actions that are essential to achieve the course outcomes:
  - A. Prepare legal documents in four fields of law: real estate and property, litigation, wills and estates, and corporations
  - B. Follow established legal procedures
  - C. Develop correspondence, printed legal forms, exhibits to legal documents, new case reports, attorney schedules, and calendar entries
  - D. Establish priorities for completing work in an office setting
  - E. Proofread, edit, and judge the acceptability or malleability of correspondence.
  - F. Maintain office files and word processing logs
  - G. Apply decision-making skills in completing documents and printed forms when minimum directions are given
  - H. Type from handwritten and rough-draft copy and edit it for corrections

### **Learning Units**

- I. General office procedures
  - A. Check request form
  - B. Seminar letter
  - C. Calendar
  - D. Memo - new long distance phone carrier

- II. Legal office accounting
  - A. Client billing sheet - Blumberg
  - B. Letter - Blumberg
  - C. Memo - from Fitzgerald (settlement)
  - D. Memo – Janetti
  
- III. Legal documentation preparation
  - A. Non-compete agreement (Hyashi)
  - B. Affidavit - Craig
  - C. Power of Attorney - Lupita
  - D. Letter – Lupita
  
- IV. Opening file procedures
  - A. New client information sheet - Ruiz
  - B. Check request form
  - C. Letter to police department
  - D. Medical authorization form
  - E. Agreement for representation form
  - F. Letter-Ruiz
  
- V. Preparation of wills
  - A. Last will and testament - Mr. Greenburg
  - B. Last will and testament - Mrs. Greenburg
  - C. Living will - Mr. Greenburg
  - D. Living will - Mrs. Greenburg
  - E. Client billing sheet - Mr. Greenburg
  - F. Client billing sheet - Mrs. Greenburg
  - G. Letter - Mr. Greenburg
  - H. Letter - Mrs. Greenburg
  
- VI. Preparation of a complaint and summons
  - A. Complaint - Ruiz
  - B. Summons - Ruiz
  - C. Check request form
  
- VII. Preparation of real estate documents
  - A. Warranty deed-Green
  - B. Bill of sale - Ms. Green
  - C. No-Lien affidavit – Green
  
- VIII. Preparation of discovery documents
  - A. Interrogatories
  - B. Request for admissions
  - C. Notice of deposition
  - D. Calendar

- E. Subpoena *Duces Tecum* form
- F. Check request form

IX. Preparation of corporate documents

- A. Articles of Incorporation
- B. Check request form
- C. Letter to the Secretary of State
- D. Organizational minutes form

X. File closing procedures

- A. Release document
- B. Letter to opposing counsel
- C. Notice of voluntary dismissal - Ruiz

**Learning Activities**

Learning activities will be geared toward developing a greater speed and accuracy, learning legal terms, and utilizing legal templates and forms appropriate to each task.

**Grade Determination**

The student will be graded on completion of assessment tasks (learning activities), quizzes, and timed writings.