Legal Administration

6736 18 weeks
6735 36 weeks

Table of Contents

Acknowledgments ......................................................................................................................................... 2
Course Description ........................................................................................................................................ 3
Task Essentials Table .................................................................................................................................. 3
Curriculum Framework ................................................................................................................................. 7
Introducing the Legal System ....................................................................................................................... 7
Conducting Client Services .......................................................................................................................... 9
Managing Office Activities .......................................................................................................................... 11
Managing Records and Files ........................................................................................................................ 14
Managing Financial Activities ..................................................................................................................... 18
Developing Business Communication Skills ............................................................................................... 24
Preparing Nonlitigation Documents ............................................................................................................... 29
Preparing Litigation Documents .................................................................................................................... 39
Identifying Legal and Business Ethics ........................................................................................................... 50
Enhancing Employability Skills .................................................................................................................... 52
Preparing for Industry Certification ............................................................................................................. 57
SOL Correlation by Task ............................................................................................................................... 60
Teacher Resources ....................................................................................................................................... 63
Cyber Security and Cyber Forensics Infusion Units ....................................................................................... 65
Entrepreneurship Infusion Units .................................................................................................................... 66
Appendix: Credentials, Course Sequences, and Career Cluster Information .................................................. 67
Acknowledgments

The components of this instructional framework were developed by the following curriculum development panelists:

Jacklyn Bruce, Instructor, Thomas Jefferson High School, Richmond City Public Schools
Julliet Coates, Instructor, Hermitage High School, Henrico County Public Schools
Robyn Hilton, Instructor, Chesterfield Career and Technical Center at Courthouse, Chesterfield County Public Schools
Kym Jones, Office Manager, Mary Washington Medical Group, Fredericksburg
Kara R. Wood, Marketing and Strategic Outreach Manager, Challa Law Group, Glen Allen

Correlations to the Virginia Standards of Learning were reviewed and updated by:

Leslie R. Bowers, English Teacher (ret.), Newport News Public Schools
Vickie L. Inge, Mathematics Committee Member, Virginia Mathematics and Science Coalition
Anne F. Markwith, New Teacher Mentor (Science), Gloucester County Public Schools
Michael L. Nagy, Social Studies Department Chair, Rustburg High School, Campbell County Public Schools

Sandy Mills, FBLA State Specialist, reviewed and updated the FBLA correlations.

The framework was edited and produced by the CTE Resource Center:

Heather A. Widener, Writer/Editor
Kevin P. Reilly, Administrative Coordinator

Virginia Department of Education Staff

Judith P. Sams, Specialist, Business and Information Technology and Related Clusters
J. Anthony Williams, Curriculum and Instruction Coordinator
Dr. David S. Eshelman, Director, Workforce Development and Initiatives
George R. Willcox, Director, Operations and Accountability

Office of Career, Technical, and Adult Education
Virginia Department of Education

Copyright © 2020
Course Description

Suggested Grade Level: 11 or 12

Students explore various areas of law (e.g., civil, criminal, family, real estate, estate, and probate) while preparing for employment in the legal field. Students gain knowledge and skills in legal document preparation, office communications, legal terminology, client services, records management, financial records, and business ethics. Successful completion of this course may lead to an entry-level position in a law office, court office, law enforcement agency, corporate legal department, or to postsecondary education. Work-based learning opportunities are available for this course.

Recommended prerequisite(s): Keyboarding course(s) or teacher-approved demonstration and documentation of touch keyboarding skills

Task Essentials Table

- Tasks/competencies designated by plus icons (⊕) in the left-hand column(s) are essential
- Tasks/competencies designated by empty-circle icons (◯) are optional
- Tasks/competencies designated by minus icons (⊖) are omitted
- Tasks marked with an asterisk (*) are sensitive.

<table>
<thead>
<tr>
<th>Task Number</th>
<th>6735</th>
<th>6736</th>
<th>Tasks/Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introducing the Legal System</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>39</td>
<td>⊕</td>
<td>⊕</td>
<td>Identify the areas of legal specialization.</td>
</tr>
<tr>
<td>40</td>
<td>⊕</td>
<td>⊕</td>
<td>Distinguish among the levels of the court system.</td>
</tr>
<tr>
<td>41</td>
<td>⊕</td>
<td>⊕</td>
<td>Illustrate the roles and responsibilities of key court personnel.</td>
</tr>
<tr>
<td>Conducting Client Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>⊕</td>
<td>⊕</td>
<td>Determine client referrals based on the requirements of the legal practice areas.</td>
</tr>
<tr>
<td>43</td>
<td>⊕</td>
<td>⊕</td>
<td>Gather client information.</td>
</tr>
<tr>
<td>44</td>
<td>⊕</td>
<td>⊕</td>
<td>Identify procedures for professional handling of difficult clients.</td>
</tr>
<tr>
<td>Managing Office Activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>45</td>
<td>+</td>
<td>+</td>
<td><strong>Demonstrate procedures for maintaining and operating office equipment.</strong></td>
</tr>
<tr>
<td>46</td>
<td>+</td>
<td>+</td>
<td><strong>Maintain the work environment.</strong></td>
</tr>
<tr>
<td>47</td>
<td>+</td>
<td>-</td>
<td><strong>Manage inventory necessary for a legal office.</strong></td>
</tr>
<tr>
<td>48</td>
<td>-</td>
<td>-</td>
<td><strong>Coordinate meetings, events, and activities.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Managing Records and Files</td>
</tr>
<tr>
<td>49</td>
<td>+</td>
<td>+</td>
<td><strong>Prepare files for new clients.</strong></td>
</tr>
<tr>
<td>50</td>
<td>+</td>
<td>+</td>
<td><strong>Update client files.</strong></td>
</tr>
<tr>
<td>51</td>
<td>+</td>
<td>+</td>
<td><strong>Create forms and template documents.</strong></td>
</tr>
<tr>
<td>52</td>
<td>+</td>
<td>-</td>
<td><strong>Compile current reference resources for office use.</strong></td>
</tr>
<tr>
<td>53</td>
<td>+</td>
<td>+</td>
<td><strong>Maintain a database of officers of the court, administrative agencies, and resource persons.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Managing Financial Activities</td>
</tr>
<tr>
<td>54</td>
<td>+</td>
<td>-</td>
<td><strong>Record fees for client and court records.</strong></td>
</tr>
<tr>
<td>55</td>
<td>+</td>
<td>-</td>
<td><strong>Describe office expenditures.</strong></td>
</tr>
<tr>
<td>56</td>
<td>+</td>
<td>+</td>
<td><strong>Prepare financial documents.</strong></td>
</tr>
<tr>
<td>57</td>
<td>+</td>
<td>-</td>
<td><strong>Perform general banking procedures.</strong></td>
</tr>
<tr>
<td>58</td>
<td>+</td>
<td>+</td>
<td><strong>Maintain attorney and staff time sheets and expense reports.</strong></td>
</tr>
<tr>
<td>59</td>
<td>+</td>
<td>-</td>
<td><strong>Maintain client account records.</strong></td>
</tr>
<tr>
<td>60</td>
<td>+</td>
<td>-</td>
<td><strong>Generate billing statements.</strong></td>
</tr>
<tr>
<td>61</td>
<td>+</td>
<td>+</td>
<td><strong>Examine the rules of professional conduct as they pertain to a Virginia licensed attorney.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Developing Business Communication Skills</td>
</tr>
<tr>
<td>62</td>
<td>+</td>
<td>+</td>
<td><strong>Prepare legal documents following an accepted style manual.</strong></td>
</tr>
<tr>
<td>63</td>
<td>+</td>
<td>+</td>
<td><strong>Process incoming and outgoing mail.</strong></td>
</tr>
<tr>
<td>64</td>
<td>+</td>
<td>+</td>
<td><strong>Maintain court and/or office calendar.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>65</td>
<td>✗</td>
<td>✗</td>
<td>Complete telephone calls.</td>
</tr>
<tr>
<td>66</td>
<td>✗</td>
<td>✗</td>
<td>Use electronic communications.</td>
</tr>
<tr>
<td>67</td>
<td>✗</td>
<td>✗</td>
<td>Identify the requirements and duties of a notary public commission in Virginia.</td>
</tr>
</tbody>
</table>

### Preparing Nonlitigation Documents

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>68</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>69</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>70</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>71</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>72</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>73</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>74</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>75</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>76</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>77</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>78</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>79</td>
<td>✗</td>
<td>✗</td>
</tr>
</tbody>
</table>

### Preparing Litigation Documents

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>81</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>82</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>83</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>84</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>85</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>86</td>
<td>+</td>
<td>Generate subpoenas and subpoenas duces tecum.</td>
</tr>
<tr>
<td>----</td>
<td>-----</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>87</td>
<td>+</td>
<td>Generate motions and notices.</td>
</tr>
<tr>
<td>88</td>
<td>+</td>
<td>Generate orders and notices.</td>
</tr>
<tr>
<td>89</td>
<td>+</td>
<td>Generate stipulations.</td>
</tr>
<tr>
<td>90</td>
<td>+</td>
<td>Generate pleadings.</td>
</tr>
<tr>
<td>91</td>
<td>+</td>
<td>Generate briefs.</td>
</tr>
<tr>
<td>92</td>
<td>+</td>
<td>Prepare depositions.</td>
</tr>
<tr>
<td>93</td>
<td>+</td>
<td>Generate defendant’s answer or grounds of defense.</td>
</tr>
</tbody>
</table>

Identifying Legal and Business Ethics

<table>
<thead>
<tr>
<th>94</th>
<th>+</th>
<th>Identify procedures for maintaining confidentiality of client information.</th>
</tr>
</thead>
<tbody>
<tr>
<td>95</td>
<td>+</td>
<td>Research current legal or ethical issues.</td>
</tr>
</tbody>
</table>

Enhancing Employability Skills

<table>
<thead>
<tr>
<th>96</th>
<th>+</th>
<th>Identify personal interests, aptitudes, and attitudes related to the qualities found in successful legal personnel.</th>
</tr>
</thead>
<tbody>
<tr>
<td>97</td>
<td>+</td>
<td>Research a career ladder of occupational opportunities in the legal field.</td>
</tr>
<tr>
<td>98</td>
<td>+</td>
<td>Investigate credentialing options for legal office personnel.</td>
</tr>
<tr>
<td>99</td>
<td>+</td>
<td>Update a traditional or online portfolio for legal employment.</td>
</tr>
<tr>
<td>100</td>
<td>+</td>
<td>Participate in a mock interview for a legal position.</td>
</tr>
<tr>
<td>101</td>
<td>+</td>
<td>Compose an interview follow-up letter.</td>
</tr>
<tr>
<td>102</td>
<td>+</td>
<td>Compose a professional letter of resignation.</td>
</tr>
<tr>
<td>103</td>
<td>+</td>
<td>Investigate employment opportunities for legal positions.</td>
</tr>
<tr>
<td>104</td>
<td>+</td>
<td>Participate in a work-based learning experience.</td>
</tr>
</tbody>
</table>

Preparing for Industry Certification
<table>
<thead>
<tr>
<th>Task Number</th>
<th>Essential</th>
<th>Non-essential</th>
<th>Omitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>105</td>
<td>✍️</td>
<td>✍️</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Describe the process and requirements for obtaining industry certifications related to the Legal Administration course.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>106</td>
<td>✍️</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Identify testing skills/strategies for certification examination.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>107</td>
<td>✍️</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Demonstrate ability to successfully complete selected practice examinations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>108</td>
<td>✍️</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Successfully complete an industry certification examination representative of skills learned in this course.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Legend: 🏷️Essential 🟠Non-essential 🗑Omitted

---

**Curriculum Framework**

**Introducing the Legal System**

---

**Task Number 39**

**Identify the areas of legal specialization.**

**Definition**

Identification should include key characteristics of the various legal specialties (e.g., civil, criminal, estate, probate, real estate, and family law).

**FBLA Competitive Events and Activities Areas**

- Business Ethics
- Business Law
- Electronic Career Portfolio
- Job Interview

---

**Task Number 40**
Distinguish among the levels of the court system.

Definition

Distinction should include jurisdictions and locations of local, state, federal, and appellate courts. Distinction should also include the three branches of government (i.e., executive, legislative, and judicial) and the role of the court system within the government.

FBLA Competitive Events and Activities Areas

Business Ethics

Business Law

Political Science

Task Number 41

Illustrate the roles and responsibilities of key court personnel.

Definition

Illustration should include, but not be limited to, the roles and responsibilities of

- commonwealth’s attorney
- attorney
- paralegal
- judge
- bailiff
- clerk of each court
- court reporter
- legal secretary/legal assistant
- alternative dispute resolution (e.g., mediator, arbitrator)
- legal advocates
- interpreter
- juries (jury and grand jury).

FBLA Competitive Events and Activities Areas

Business Ethics
**Conducting Client Services**

**Task Number 42**

Determine client referrals based on the requirements of the legal practice areas.

**Definition**

Determination should be based on

- knowledge of legal practice areas within the office
- reference to internal guidelines set for referrals.

**FBLA Competitive Events and Activities Areas**

Business Ethics

Business Law

**Task Number 43**

Gather client information.

**Definition**

Gathering of information should include

- addressing the client professionally
- obtaining the client’s identifying information (e.g., full name, address, contact numbers)
- obtaining second contact information (e.g., friend, relative not living in the household)
- obtaining required demographic information
- obtaining information required to complete forms for non-litigation and litigation matters
- adhering to legal guidelines and client confidentiality
- confirming client’s preference for method of contact (e.g., email, phone, text)
- completing forms required for the client's file.

**FBLA Competitive Events and Activities Areas**

**Business Communication**

**Business Ethics**

**Business Law**

**Computer Applications**

**Database Design & Applications**

**Introduction to Business Communication**

**Introduction to Business Procedures**

**Spreadsheet Applications**

**Word Processing**

---

**Task Number 44**

**Identify procedures for professional handling of difficult clients.**

**Definition**

Identification should include

- following safety procedures in the office for everyday and crisis situations
- maintaining professionalism (e.g., reacting calmly and assisting)
- knowing when and how to ask for support.

**FBLA Competitive Events and Activities Areas**
Managing Office Activities

Task Number 45

Demonstrate procedures for maintaining and operating office equipment.

Definition

Demonstration should include following manufacturer’s specifications for

- loading paper
- cleaning equipment, including glass surfaces
- clearing paper jams
- changing toner cartridge
- integrating technologies (e.g., copier to email)
- information security considerations, including encryption.

FBLA Competitive Events and Activities Areas

Computer Applications

Database Design & Applications

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Task Number 46
Maintain the work environment.

Definition

Maintenance should include

- following protocols for maintaining a secure work environment
- following correct procedures for turning on, logging in and out, and shutting down the computer (e.g., maintaining secure passwords and logging out whenever leaving the workstation)
- troubleshooting basic problems related to the operation of the computer, according to the manufacturer’s specification
- handling portable storage devices in a manner consistent with security policies
- keeping a neat and organized work area with necessary supplies and materials
- handling sensitive and confidential information.

FBLA Competitive Events and Activities Areas

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Task Number 47

Manage inventory necessary for a legal office.

Definition

Management should include

- keeping a list of office supplies and equipment
- maintaining secure storage and distribution of office supplies and equipment
- conducting a physical count of office supplies and equipment
identifying procedures for ordering office supplies and equipment and maintaining online accounts.

FBLA Competitive Events and Activities Areas

Computer Applications

Database Design & Applications

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Task Number 48

Coordinate meetings, events, and activities.

Definition

Coordination should include

- timely dissemination of information to participants
- creating a meeting or event agenda
- reserving and preparing facilities
- organizing meal function requests, orders, and payments
- gathering materials and equipment to be used at the meeting, event, or activity
- registering participants
- planning the function
- conducting follow-up (e.g., recording and disseminating meeting minutes, making payments, writing thank you notes).

FBLA Competitive Events and Activities Areas

Business Communication

Computer Applications

Database Design & Applications

Introduction to Business Communication
Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Managing Records and Files

Task Number 49

Prepare files for new clients.

Definition

Preparation should include

- adhering to legalities related to conflict of interest, standards of confidentiality, and other ethical considerations
- adhering to legalities related to dates and deadlines (e.g., court filing deadlines, statutes of limitations, mootness, and ripeness)
- adhering to office policy and procedures for filing new client documents (e.g., alphabetical, numeric, or client matter number)
- applying appropriate document format
- completing appropriate forms.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication
Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Task Number 50

Update client files.

Definition

Update should be made according to

- office guidelines for verifying new information
- policy and procedures for updating and retaining secure office files
- procedures for disclosing pertinent case information to other parties entitled to receive information
- alerting relevant parties to changes.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication

Spreadsheet Applications

Word Processing

Task Number 51
Create forms and template documents.

Definition

Creation should include

- using appropriate, updated software
- identifying components of existing forms for use in new templates
- developing new document formats and components as needed
- accessing template documents or forms
- maintaining forms and template documents
- saving templates and forms for future use.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Task Number 52

Compile current reference resources for office use.

Definition

Compilation should include
• internal resource guide (e.g., office personnel, their areas of expertise, and contact information)
• external resource guide (e.g., court personnel, professional colleagues, administrative agencies, and suppliers)
• professional reference guide (e.g., legal dictionaries, encyclopedias, newspapers, and publications; online references; and state guidelines)
• office policies and procedures guide (e.g., document samples, filing guidelines, accepted style guides, and office operation and financial procedures for staff)
• website guide (e.g., Virginia courts, court forms, and the Virginia State Corporation Commission).

Manuals should be kept current by updating resources at regular intervals.

**FBLA Competitive Events and Activities Areas**

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

---

**Task Number 53**

**Maintain a database of officers of the court, administrative agencies, and resource persons.**

**Definition**

Maintenance should include

• using database, spreadsheet, or word processing software to create a resource database
• applying knowledge of the legal system for collection of resources and agencies
• cross-referencing services and contacts
• following guidelines for updating and purging information.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

----------------------------

Managing Financial Activities

----------------------------

Task Number 54

Record fees for client and court records.

Definition

Recording should be based on

• applying standard attorney and court fees to services and time provided (i.e., contingency fee, hourly rate, retainers, sliding fee, flat fee, pro bono)
• identifying the methods of fee collection used by attorneys
• recognizing the differences between legal fees vs. expenses and costs
• applying fees in billing statements and settlement statements
• applying office procedures for tracking costs and expenses (e.g., travel, incidentals).

FBLA Competitive Events and Activities Areas

Accounting I
Accounting II

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Task Number 55

Describe office expenditures.

Definition

Description should include

• definitions and procedures for using petty cash, purchase requisition, and vouchers
• completion of related forms.

FBLA Competitive Events and Activities Areas

Accounting I
Accounting II
Task Number 56

Prepare financial documents.

Definition

Preparation could include documents such as financial reports, bank statement reconciliations, general ledgers, and receipts, and should include

- generating a report of daily operations
- applying financial procedures to legal documents
- maintaining client trust or escrow account reports
- reconciling bank statements
- recording financial transactions and calculating balances.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Introduction to Business Procedures

Task Number 57

Perform general banking procedures.

Definition

Performance should include

- preparing deposit slips
- endorsing checks
- making deposits
- writing checks
- counting money.
Task Number 58

Maintain attorney and staff time sheets and expense reports.

Definition

Maintenance should include

- following generally accepted accounting principles (GAAP)
- using various applications for timekeeping
- recording data from fees, services, and time records in a timely manner
- calculating specific pay rates and breakdowns
- compiling attorney’s expense reports (e.g., mileage to/from trials or court, overnight hotel stays if case related, business meals)
- using an established office process for reporting time spent on a client’s case (e.g., research, phone calls, meetings, document preparation, trial preparation).
Task Number 59

Maintain client account records.

Definition

Maintenance should include

- identifying a legal fee or service
- identifying an expense or cost advanced to the client
- recognizing the ethical implications of comingling client’s funds with the firm’s funds or with other clients’ funds (e.g., maintaining escrow accounts)
- describing how a trust account works
- monitoring the cash receipts journal, the cash disbursements journal, and the subsidiary ledger.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Banking and Financial Systems

Business Ethics

Business Law

Introduction to Business Procedures

Personal Finance

Task Number 60

Generate billing statements.

Definition
Generation should reflect

- the time and labor required to perform the legal service
- the fee customarily charged in the locality for similar legal services
- the nature and length of the professional relationship with the client
- the experience, reputation, and ability of the lawyer or lawyers performing the services
- whether the fee is fixed or contingent
- knowledge of the American Bar Association Model Rules of Professional Conduct as they pertain to “reasonable legal fees.”

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Banking and Financial Systems

Business Ethics

Business Law

Introduction to Business Procedures

Personal Finance

Task Number 61

Examine the rules of professional conduct as they pertain to a Virginia licensed attorney.

Definition

Examination should include reading The Virginia State Bar Professional Guidelines, including the Rules of Professional Conduct and the Unauthorized Practice Rules.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II
Developing Business Communication Skills

Task Number 62

Prepare legal documents following an accepted style manual.

Definition

Preparation should demonstrate origination and revision of documents, including

- preferred legal document formats
- proofreading and editing skills
- knowledge of legal terminology
- process and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- knowledge of citation formats (e.g., *The Bluebook, a Uniform System of Citation*).

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Business Communication

Business Law

Computer Applications
Task Number 63

Process incoming and outgoing mail.

Definition

Processing of mail should demonstrate knowledge of

- procedures for date stamping, sorting, arranging, encrypting (for email), and distributing all incoming mail
- major classifications of outgoing mail and the procedures for processing each type (e.g., certified, registered, return receipt requested)
- confidentiality and information security considerations
- mail delivery services.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication

Introduction to Business Procedures
Task Number 64

Maintain court and/or office calendar.

Definition

Maintenance should include

- scheduling client appointments, court dates, and legal professionals’ time (e.g., debriefings, preparation, travel, routine tasks)
- extracting pertinent scheduling information from court dockets
- determining time requirements and urgency of appointments and tasks
- maintaining a tickler, or tracking system, with reminders at 90, 60, 30, and 15 days to ensure key dates are not missed.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Database Design & Applications

Introduction to Business Communication

Introduction to Business Procedures

Spreadsheet Applications

Word Processing

Task Number 65
Complete telephone calls.

Definition

Completion should include placing and receiving individual calls, conference calls, and video conferencing and should demonstrate

- the qualities of a good telephone voice
- use of proper telephone etiquette (e.g., identifying the company, greeting callers professionally, asking the caller’s need, recognizing regular clients)
- knowledge of procedures for operating the phone system and setting up conference calls
- attention to taking accurate and complete messages from callers and obtaining phone numbers
- knowledge of the differing types of incoming and outgoing calls and the procedure for call prioritization
- development of a telephone directory (e.g., electronic, personal, company).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Task Number 66

Use electronic communications.

Definition

Use should include transmittal and receipt procedures for

- corresponding by email, including using encryption, online etiquette, and adding attachments as required
- preparing fax cover sheets
- using appropriate office devices for email and fax
identifying specific legal documents that must be transmitted as original documents and those that may be transmitted as copies
ensuring documents are transmitted to and received by the intended recipient to prevent unintentional breaches of confidentiality (i.e., using reply rather than reply all when responding).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Task Number 67

Identify the requirements and duties of a notary public commission in Virginia.

Definition

Identification should include

- the purpose of notarized documents
- requirements to become a notary public
  - be at least 18 years of age
  - be able to read and write English
  - be a legal resident of the United States
  - live or work in Virginia
  - have no felony conviction unless pardoned or have had rights restored
  - pay a state filing fee in Virginia
  - renew commission every four years in the Commonwealth of Virginia
- the key responsibilities of a notary in a legal office setting
  - notarizing internal and external documents that require certification
  - familiarizing oneself with procedures and laws involving notarized documents
  - identifying the tools involved in electronic (i.e., software) and paper notary (i.e., rubber stamp, ink pen)
  - defining e-notarization and the requirements for this method of notarization.
Preventing Nonlitigation Documents

Task Number 68

Generate agreements, contracts, and leases.

Definition

Generation should include

- demonstrating proficiency in preparing agreements, contracts, and leases
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- adding digital signatures in legal documents
- converting and sharing files using a portable document format.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures
Task Number 69

Generate affidavits.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing affidavits
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- adding digital signatures in legal documents, if appropriate.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 70
Generate acknowledgments.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing acknowledgments
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 71

Prepare bills of sale and deeds.

Definition

Preparation should include

- defining the use of and demonstrating proficiency in preparing bills of sale and deeds
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following process and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- adding digital signatures in legal documents, if appropriate.
Task Number 72

Generate probate documents and final accounting of estates.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing estate qualification, inventory, and accountings
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- adding digital signatures in legal documents.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Banking and Financial Systems

Business Communication

Business Law
Task Number 73

Generate wills and codicils, powers of attorney, and medical directives.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing wills, powers of attorney, and medical directives
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing
Task Number 74

Generate promissory notes.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing promissory notes
- demonstrating knowledge of fees for promissory notes
- demonstrating accurate calculations
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- adding digital signatures in legal documents, if appropriate.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 75

Generate documents for articles of incorporation.

Definition

Generation should include
• defining the use of and demonstrating proficiency in preparing articles of incorporation
• working with the appropriate state agencies
• demonstrating knowledge of corporate entity
• generating documents using preferred legal document formats
• applying proofreading and editing skills
• following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
• adding digital signatures in legal documents, if appropriate.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 76

Generate corporation documents.

Definition

Generation should include

• preparing a business plan
• defining the use of and demonstrating proficiency in preparing corporation documents (e.g., bylaws, minutes) and stock certificates
• demonstrating the stock-transfer ledger process
• documenting the initial organizational meeting
• generating documents using preferred legal document formats
• applying proofreading and editing skills
• following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
• adding digital signatures in legal documents, if appropriate.
Task Number 77

Generate collection letters or forms.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing collection letters or forms
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- adding digital signatures in legal documents, if appropriate.

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Business Communication

Business Law

Computer Applications
Task Number 78

Generate papers for bankruptcy.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing papers for bankruptcy
- defining the legal terminology involved in bankruptcy
- comparing the different types of bankruptcy
- demonstrating knowledge of bankruptcy documents to legally discharge debts and distribute assets, including
  - creating litigation checklists
  - developing a file summary
  - filing a Statement of Financial Affairs
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Accounting I

Accounting II

Banking and Financial Systems

Business Communication

Business Law

Computer Applications
Task Number 79

Generate marriage agreements.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing marriage agreements
- defining marriage according to current state laws
- understanding the purposes of prenuptial and postnuptial agreements
- demonstrating knowledge of the obligations and duties involved in prenuptial and postnuptial agreements
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing
Preparing Litigation Documents

Task Number 80

Prepare requests for service of process (e.g., complaints, summonses).

Definition

Preparation should include

- defining the use of and demonstrating proficiency in preparing requests for service of process
- understanding the use of the long-arm statute
- understanding effective service and the importance of having accurate contact information on defendants, witnesses, and all parties involved
- using the appropriate process for a service of process (e.g., mail, in person)
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for determining
  - who can be subpoenaed and who cannot
  - when it is necessary to issue court summonses (i.e., witness subpoena, request for service of process, subpoena duces tecum, subpoena ad testificandum)
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney)
- using the courts’ forms for attorney-issued subpoenas.

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication
Introduction to Business Procedures

Word Processing

Task Number 81

Prepare divorce decrees.

Definition

Preparation should include

- defining the use of and demonstrating proficiency in preparing divorce decrees
- understanding court jurisdictions
- identifying the two types of divorce in Virginia (i.e., divorce from bed and board, divorce from the bonds of matrimony)
- understanding the valid grounds for divorce and annulment in Virginia
- understanding the difference between a divorce involving children and a divorce involving childless couples
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 82
Prepare property and settlement agreements.

Definition

Preparation should include

- understanding the related legal requirement, especially those granted to spouses by way of marriage
- defining the use of and demonstrating proficiency in preparing property and settlement agreements
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 83

Generate complaint documents.

Definition

Generation should include

- demonstrating an understanding of the law as it applies to the area in which the complaint has been filed (e.g., torts, general negligence, contract disputes)
- defining the use of and demonstrating proficiency in preparing complaints
• generating documents using preferred legal document formats
• applying proofreading and editing skills
• following process and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

---

Task Number 84

Generate summonses.

Definition

Generation should include

• demonstrating knowledge of the purpose of a summons
• describing the difference between a subpoena and a summons, and who can be served with each
• demonstrating knowledge of proper venue and jurisdiction, and the statute of limitations for filing
• demonstrating knowledge of the requirements for service
• defining the use of and demonstrating proficiency in preparing summonses
• knowing when a complaint has been filed
• generating documents using preferred legal document formats
• applying proofreading and editing skills
• following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas
Task Number 85

Generate interrogatories and requests.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing interrogatories
- knowing the purpose and scope of discovery
- knowing all questions asked and answers received during the preparation of the discovery document
- observing the statutory period
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication
Introduction to Business Procedures

Word Processing

Task Number 86

Generate subpoenas and subpoenas duces tecum.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing subpoenas and subpoenas duces tecum
- understanding who and what can be subpoenaed
- understanding the types of subpoenas (i.e., witness subpoenas, subpoenas duces tecum, and subpoenas ad testificandum) and when and where they should be used
- understanding a proof of service
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 87
Generate motions and notices.

Definition

Generation should include

- demonstrating an understanding of the purpose of a notice
- demonstrating an understanding of a motion
- demonstrating an understanding of a motion for nonsuit
- understanding the types of motions generally made by attorneys
- defining the use of and demonstrating proficiency in preparing motions and notices
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 88

Generate orders and notices.

Definition

Generation should include

- defining the use of and demonstrating proficiency in preparing orders and notices
- being aware of action ordered by the court
• knowing court jurisdictions and parties involved
• generating documents using preferred legal document formats
• applying proofreading and editing skills
• following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 89

Generate stipulations.

Definition

Generation should include

• defining the term stipulation—agreement by the parties prior to a hearing of trial of facts, what will be produced, and on what they can agree
• demonstrating an understanding of how stipulations are used and to what purpose
• defining the use of and demonstrating proficiency in preparing stipulations
• generating documents using preferred legal document formats
• applying proofreading and editing skills
• following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication
Task Number 90

Generate pleadings.

Definition

Generation should include

- demonstrating a knowledge of the requirements for any prima facie case, civil or criminal
- demonstrating a basic knowledge of the litigation process from beginning to end
- defining the use of and demonstrating proficiency in preparing pleadings
- understanding the particular claims of a party, jurisdiction, and the opponent’s case
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).
Task Number 91

Generate briefs.

Definition

Generation should include

- demonstrating knowledge of legal documents, specifically briefs (i.e., documents containing all facts and points of law pertinent to a particular case)
- demonstrating a basic knowledge of legal research
- generating proper citations for referenced resources
- demonstrating how and when legal briefs are to be used
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- demonstrating an understanding of statutory and case law and the burden of proof
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 92

Prepare depositions.
Definition

Preparation should include

- defining the use of and demonstrating proficiency in preparing depositions
- explaining the difference between regular depositions and de bene esse depositions
- preparing the notice
- arranging for a court reporter and/or interpreter
- determining location (e.g., in the attorney’s office or in a courtroom)
- recording information through voice technology, recording devices, and transcription
- generating documents using preferred legal document formats
- applying proofreading and editing skills
- preparing deposition summary
- following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Cyber Security

Digital Video Production

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Task Number 93

Generate defendant’s answer or grounds of defense.

Definition

Generation should include
• defining the use of and demonstrating proficiency in preparing a defendant’s answer, responses, or grounds of defense
• generating documents using preferred legal document formats
• applying proofreading and editing skills
• following processes and procedures for modifying legal documents (e.g., the initialing of changes by the client or attorney).

FBLA Competitive Events and Activities Areas

Business Communication

Business Law

Computer Applications

Introduction to Business Communication

Introduction to Business Procedures

Word Processing

Identifying Legal and Business Ethics

Task Number 94

Identify procedures for maintaining confidentiality of client information.

Definition

Identification should include the following information:

• All professionals in the legal industry must abide by organizational procedures and guidelines regarding client confidentiality.
• All professionals in the legal industry must abide by the Virginia State Bar Rules of Professional Conduct and the Unauthorized Practice Rules.
Task Number 95

Research current legal or ethical issues.

Definition

Research should include use of

- online resources
- libraries, both internal and external
- professional journals and other periodicals.
Task Number 96

Identify personal interests, aptitudes, and attitudes related to the qualities found in successful legal personnel.

Definition

Identification should include

- conducting a self-inventory of interests, aptitudes, and attitudes using a credible personality model (e.g., Myers-Briggs typological approach)
- matching personality traits to those sought by employers in the legal field.

FBLA Competitive Events and Activities Areas

Electronic Career Portfolio

Job Interview

Task Number 97

Research a career ladder of occupational opportunities in the legal field.

Definition

Research should
- result in a pool of job titles related to the legal administration field (e.g., law enforcement, courts, social services, banking, government)
- include the preparation required for each job, opportunities for advancement, and employment trends in the field
- use job databanks
- match the student’s abilities, aptitudes, and job expectations with industry standards.

**FBLA Competitive Events and Activities Areas**

**Electronic Career Portfolio**

**Job Interview**

---

**Task Number 98**

**Investigate credentialing options for legal office personnel.**

**Definition**

Investigation should identify the current industry certifications and credentials available in the legal field (e.g., legal administration, attorneys, accountants, investigators, trial support personnel) and the requirements for attainment.

**FBLA Competitive Events and Activities Areas**

**Electronic Career Portfolio**

**Job Interview**

---

**Task Number 99**

**Update a traditional or online portfolio for legal employment.**

**Definition**

Updating should include

- cover letter, to include
appropriate business letter format
statement of how the applicant found the job posting and their interest in the position
statement indicating the applicant’s résumé and references are enclosed for review
explanation of the applicant’s additional qualifications, ones not shown on the résumé
confirmation of the applicant’s interest in the job
the applicant’s contact information
a request for further action, perhaps an interview or meeting

- current résumé
- use of keywords
- salary requirements if requested
- employment application
- samples of work
- work-based learning experiences
- certifications and/or security clearances
- language fluencies (including American Sign Language)
- school activities
- community involvement
- references
- online presence (e.g., LinkedIn).

FBLA Competitive Events and Activities Areas

Electronic Career Portfolio

Job Interview

Task Number 100

Participate in a mock interview for a legal position.

Definition

Participation should give students the opportunity to

- practice presenting a professional appearance and desirable interviewing skills (e.g., maintaining eye contact, asking informed questions, wearing appropriate clothing and accessories, demonstrating professional demeanor)
- identify undesirable characteristics (e.g., speaking too softly; failing to answer questions completely; wearing inappropriate clothing, jewelry, or cologne).
Whenever possible, students should be interviewed by industry professionals and receive feedback from them as to what the employer’s expectations are in an interview. Interviews may also be conducted virtually (i.e., online), by phone, or in person.

FBLA Competitive Events and Activities Areas

Electronic Career Portfolio

Job Interview

Michael Mills Learn to Lead Scholarship

Individual Event

Task Number 101

Compose an interview follow-up letter.

Definition

Composition should include

- appropriate business letter format (email and traditional/paper)
- expression of appreciation for the interview
- reminder of the applicant’s qualifications
- confirmation of the applicant’s interest in the job
- a request for further action, perhaps a second interview or meeting.

FBLA Competitive Events and Activities Areas

Computer Applications

Electronic Career Portfolio

Job Interview

Word Processing

Task Number 102

Compose a professional letter of resignation.
Definition

Composition should include

- a statement of the employee’s decision to leave the position
- expression of appreciation for the learning and growth opportunities
- a provision of ample time to find a replacement, usually two weeks.

FBLA Competitive Events and Activities Areas

Computer Applications

Electronic Career Portfolio

Job Interview

Word Processing

---

Task Number 103

Investigate employment opportunities for legal positions.

Definition

Investigation should be based on research from credible and current employment resources including

- online sites (e.g., both job posting sites, professional networking sites)
- classified advertisements
- directories
- professional journals
- employment agencies (e.g., temporary agencies, Virginia Employment Commission [VEC])
- government listings (e.g., U.S. Department of Labor, Bureau of Labor Statistics)
- networking
- school and career counselors.

FBLA Competitive Events and Activities Areas

Computer Applications

Electronic Career Portfolio
Task Number 104

Participate in a work-based learning experience.

Definition

Participation could include

- job shadowing
- service learning
- mentorship
- externship
- school-based enterprise
- internship
- entrepreneurship
- clinical experience
- cooperative education
- Youth Registered Apprenticeship
- Registered Apprenticeship.

FBLA Competitive Events and Activities Areas

Computer Applications

Electronic Career Portfolio

Job Interview

Word Processing

Preparing for Industry Certification
Task Number 105

Describe the process and requirements for obtaining industry certifications related to the Legal Administration course.

Definition

The description should include a list of industry certifications related to the Legal Administration course and the process/requirements for obtaining the certifications from

- official websites of the testing organization/vendor
- materials from publishers that have developed practice materials and tests based on information from the testing organization/vendor
- information from certified instructors or industry-certified professionals
- information in the “Course Description” section of this document.

FBLA Competitive Events and Activities Areas

Computer Applications

Database Design & Applications

Electronic Career Portfolio

Job Interview

Spreadsheet Applications

Word Processing

Task Number 106

Identify testing skills/strategies for certification examination.

Definition

The identification of testing skills and strategies should be undertaken by

- conducting an Internet research project
- reviewing materials from exam and practice-exam publishers
- interviewing certified instructors and/or industry-certified professionals.

**FBLA Competitive Events and Activities Areas**

**Computer Applications**

**Database Design & Applications**

**Electronic Career Portfolio**

**Job Interview**

**Spreadsheet Applications**

**Word Processing**

---

**Task Number 107**

**Demonstrate ability to successfully complete selected practice examinations.**

**Definition**

The demonstration should include obtaining and successfully completing practice examinations for selected certifications related to the course. The tests should be obtained from vendor sites and/or from publishers. The level of performance on a practice examination serves as a gauge of the applicant's readiness for formal industry testing.

**FBLA Competitive Events and Activities Areas**

**Computer Applications**

**Database Design & Applications**

**Electronic Career Portfolio**

**Job Interview**

**Spreadsheet Applications**

**Word Processing**
Task Number 108

Successfully complete an industry certification examination representative of skills learned in this course.

Definition

The successful completion of an industry certification examination will be achieved when the student applicant earns an examination score deemed passing by the testing organization. Qualifying examinations are those currently approved at the state level as representative of Legal Administration skills.

Students should be encouraged to attain industry certification as evidence of their legal systems administration skill level and general employability.

FBLA Competitive Events and Activities Areas

Computer Applications

Database Design & Applications

Electronic Career Portfolio

Job Interview

Spreadsheet Applications

Word Processing

SOL Correlation by Task

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>English:</th>
<th>History and Social Science:</th>
</tr>
</thead>
<tbody>
<tr>
<td>39</td>
<td>Identify the areas of legal specialization.</td>
<td>11.5, 12.5</td>
<td>GOVT.10, WHI.6</td>
</tr>
<tr>
<td>40</td>
<td>Distinguish among the levels of the court system.</td>
<td>11.5, 12.5</td>
<td>GOVT.7, GOVT.8, GOVT.10</td>
</tr>
</tbody>
</table>
| 41 | Illustrate the roles and responsibilities of key court personnel. | English: 11.5, 12.5  
History and Social Science: GOVT.8, GOVT.10 |
| 42 | Determine client referrals based on the requirements of the legal practice areas. | English: 11.5, 12.5 |
| 43 | Gather client information. | English: 11.5, 11.6, 11.7, 12.5, 12.6, 12.7 |
| 44 | Identify procedures for professional handling of difficult clients. | English: 11.5, 12.5 |
| 45 | Demonstrate procedures for maintaining and operating office equipment. | English: 11.5, 12.5 |
| 46 | Maintain the work environment. | English: 11.5, 12.5 |
| 47 | Manage inventory necessary for a legal office. | English: 11.5, 11.6, 11.7, 12.5, 12.6, 12.7 |
| 48 | Coordinate meetings, events, and activities. | English: 11.5, 11.6, 11.7, 12.5, 12.6, 12.7 |
| 49 | Prepare files for new clients. | English: 11.5, 12.5 |
| 50 | Update client files. | English: 11.5, 12.5 |
| 51 | Create forms and template documents. | English: 11.5, 12.5 |
| 52 | Compile current reference resources for office use. | English: 11.5, 11.8, 12.5, 12.8  
History and Social Science: GOVT.8 |
| 53 | Maintain a database of officers of the court, administrative agencies, and resource persons. | English: 11.5, 11.8, 12.5, 12.8 |
| 54 | Record fees for client and court records. | English: 11.5, 11.8, 12.5, 12.8  
Mathematics: A.1, A.4 |
| 55 | Describe office expenditures. | English: 11.5, 12.5 |
| 56 | Prepare financial documents. | English: 11.5, 12.5  
Mathematics: A.1, A.4 |
| 57 | Perform general banking procedures. | English: 11.6, 11.7, 12.6, 12.7 |
| 58 | Maintain attorney and staff time sheets and expense reports. | English: 11.5, 11.6, 11.7, 12.5, 12.6, 12.7  
Mathematics: A.1, A.4 |
| 59 | Maintain client account records. | English: 11.5, 12.5 |
| 60 | Generate billing statements. | English: 11.6, 11.7, 12.6, 12.7 |
| 61 | Examine the rules of professional conduct as they pertain to a Virginia licensed attorney. | English: 11.5, 12.5  
History and Social Science: GOVT.8, GOVT.10 |
<p>| 62 | Prepare legal documents following an accepted style manual. | English: 11.5, 12.5 |</p>
<table>
<thead>
<tr>
<th></th>
<th>Task Description</th>
<th>Level(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>63</td>
<td>Process incoming and outgoing mail.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>64</td>
<td>Maintain court and/or office calendar.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>65</td>
<td>Complete telephone calls.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>66</td>
<td>Use electronic communications.</td>
<td>English: 11.2, 12.2</td>
</tr>
<tr>
<td>67</td>
<td>Identify the requirements and duties of a notary public commission in Virginia.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>68</td>
<td>Generate agreements, contracts, and leases.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>69</td>
<td>Generate affidavits.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>70</td>
<td>Generate acknowledgments.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>71</td>
<td>Prepare bills of sale and deeds.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>72</td>
<td>Generate probate documents and final accounting of estates.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>73</td>
<td>Generate wills and codicils, powers of attorney, and medical directives.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>74</td>
<td>Generate promissory notes.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mathematics: A.1</td>
</tr>
<tr>
<td>75</td>
<td>Generate documents for articles of incorporation.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>76</td>
<td>Generate corporation documents.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>77</td>
<td>Generate collection letters or forms.</td>
<td>English: 11.5, 11.6, 11.7, 12.5, 12.6, 12.7</td>
</tr>
<tr>
<td>78</td>
<td>Generate papers for bankruptcy.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>79</td>
<td>Generate marriage agreements.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>80</td>
<td>Prepare requests for service of process (e.g., complaints, summonses).</td>
<td>English: 11.5, 11.6, 11.7, 12.5, 12.6, 12.7</td>
</tr>
<tr>
<td>81</td>
<td>Prepare divorce decrees.</td>
<td>English: 11.5, 11.6, 11.7, 12.5, 12.6, 12.7</td>
</tr>
<tr>
<td>82</td>
<td>Prepare property and settlement agreements.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>83</td>
<td>Generate complaint documents.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>84</td>
<td>Generate summonses.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>85</td>
<td>Generate interrogatories and requests.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>86</td>
<td>Generate subpoenas and subpoenas duces tecum.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>87</td>
<td>Generate motions and notices.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>88</td>
<td>Generate orders and notices.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>89</td>
<td>Generate stipulations.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>90</td>
<td>Generate pleadings.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>91</td>
<td>Generate briefs.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>92</td>
<td>Prepare depositions.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>93</td>
<td>Generate defendant’s answer or grounds of defense.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>94</td>
<td>Identify procedures for maintaining confidentiality of client information.</td>
<td>English: 11.5, 11.8, 12.5, 12.8</td>
</tr>
<tr>
<td>95</td>
<td>Research current legal or ethical issues.</td>
<td>English: 11.8, 12.8</td>
</tr>
<tr>
<td>96</td>
<td>Identify personal interests, aptitudes, and attitudes related to the qualities found in successful legal personnel.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>97</td>
<td>Research a career ladder of occupational opportunities in the legal field.</td>
<td>English: 11.5, 11.8, 12.5, 12.8</td>
</tr>
<tr>
<td>98</td>
<td>Investigate credentialing options for legal office personnel.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>99</td>
<td>Update a traditional or online portfolio for legal employment.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7</td>
</tr>
<tr>
<td>100</td>
<td>Participate in a mock interview for a legal position.</td>
<td>English: 11.1, 11.5, 12.1, 12.5</td>
</tr>
<tr>
<td>101</td>
<td>Compose an interview follow-up letter.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>102</td>
<td>Compose a professional letter of resignation.</td>
<td>English: 11.5, 11.6, 11.7, 11.8, 12.5, 12.6, 12.7, 12.8</td>
</tr>
<tr>
<td>103</td>
<td>Investigate employment opportunities for legal positions.</td>
<td>English: 11.5, 11.8, 12.5</td>
</tr>
<tr>
<td>104</td>
<td>Participate in a work-based learning experience.</td>
<td>English: 11.1, 11.5, 12.1, 12.5</td>
</tr>
<tr>
<td>105</td>
<td>Describe the process and requirements for obtaining industry certifications related to the Legal Administration course.</td>
<td>English: 11.2, 11.5, 12.2, 12.5 History and Social Science: GOVT.8</td>
</tr>
<tr>
<td>106</td>
<td>Identify testing skills/strategies for certification examination.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>107</td>
<td>Demonstrate ability to successfully complete selected practice examinations.</td>
<td>English: 11.5, 12.5</td>
</tr>
<tr>
<td>108</td>
<td>Successfully complete an industry certification examination representative of skills learned in this course.</td>
<td>English: 11.5, 12.5</td>
</tr>
</tbody>
</table>

**Teacher Resources**

**Instructional Scenarios**
The following instructional scenarios provide classroom activities to support the major concepts included in Legal Administration.

- **Courts and Jurisdictions**  
  Duty/Concept Area: Introducing the Legal System  
  Students will identify federal, state, and local courts in the state of Virginia.

- **Jammed Photo Copier**  
  Duty/Concept Area: Managing Office Activities  
  Students will outline office policies and procedures to address the maintenance of copiers and printers.

- **Client Information**  
  Duty/Concept Area: Conducting Client Services  
  Students will role play the process of gathering information from a client.

- **Client Confidentiality and Social Media**  
  Duty/Concept Area: Identifying Legal and Business Ethics  
  Students will investigate office policies and procedures and strategies to protect client confidentiality and data security.

- **Employment Communications: Cover Letters**  
  Duty/Concept Area: Enhancing Employability Skills  
  Students will compose a professional cover letter.

- **Job Shadowing and Conducting Informational Interviews**  
  Duty/Concept Area: Preparing for Industry Certification  
  Students will conduct an informational interview with a professional in the field.

- **Testing Strategies**  
  Duty/Concept Area: Preparing for Industry Certification  
  Students will identify testing strategies and devise a study plan.

**Texts**


**References**

- The Bluebook—A Uniform System of Citation, 18th, Harvard Law Review Staff, ISBN: 0614199433
Professional Associations

- American Bar Association Center for Professional Responsibility (https://www.americanbar.org/groups/professional_responsibility/)
- NALS—the association for legal professionals (www.nals.org)
- VALS—the Virginia association for legal professionals (www.v-a-l-s.org)

Legal Forms

- forms.lp.findlaw.com
- practice.findlaw.com
- www.lectlaw.com
- www.justice.gov
- www.uslegalforms.com

Web Resources

- American Association for Justice (www.justice.org)
- Attorney General, Office of the (www.oag.state.va.us)
- Code of Virginia (http://leg1.state.va.us/000/src.htm)
- Court Case Information (www.courts.state.va.us)
- CPT Codes (https://commerce.ama-assn.org/store/)
- Dictionary—Legal (http://dictionary.law.com)
- Freedom of Information Act letter generator (https://www.ifoia.org/#!/)
- Lawyer Information (www.findlaw.com)
- Property Damage (www.nadaguides.com; www.kbb.com)
- United States Supreme Court Decisions (http://www.supremecourt.gov/opinions/opinions.aspx)
- Virginia Continuing Legal Education (www.vacle.org)
- Virginia General Assembly (http://virginialegislature.virginia.gov/)
- Virginia State Police (www.vsp.state.va.us)
- Virginia Supreme Court (www.courts.state.va.us/courts/scv/home.html)
- Workers’ Compensation Commission (www.wvc.state.va.us)

Cyber Security and Cyber Forensics Infusion Units

Cyber Security and Cyber Forensics Infusion Units (CYBR) were designed to be infused with designated CTE courses to help students in those programs achieve additional, focused, validated tasks/competencies in personal and professional cyber security skills. These units are not
mandatory, and, as such, the tasks/competencies are marked as "optional," to be taught at the instructor's discretion.

Entrepreneurship Infusion Units

Entrepreneurship Infusion Units may be used to help students achieve additional, focused competencies and enhance the validated tasks/competencies related to identifying and starting a new business venture. Because the unit is a complement to certain designated courses and is not mandatory, all tasks/competencies are marked “optional.”
Appendix: Credentials, Course Sequences, and Career Cluster Information

Industry Credentials: Only apply to 36-week courses

- A*S*K Concepts of Entrepreneurship and Management Assessment
- A*S*K Concepts of Finance Assessment
- A*S*K Fundamental Business Concepts Assessment
- Administrative Assisting Assessment
- Administrative Services Assessment
- Banking and Related Services Assessment
- Business Financial Management Assessment
- College and Work Readiness Assessment (CWRA+)
- Communication Skills for Business Examination
- Customer Service Examination
- Financial and Investment Planning Assessment
- General Management Assessment
- Human Resources Management Assessment
- IC3 Digital Literacy Certification Examination
- Microsoft 365 Fundamentals Examination
- Microsoft Certified Azure Fundamentals Examination
- Microsoft Dynamics 365 Fundamentals Examination
- Microsoft Office Specialist (MOS) Examinations
- National Career Readiness Certificate Assessment
- W!SE Financial Literacy Certification Test
- Workplace Readiness Skills for the Commonwealth Examination

Concentration sequences: A combination of this course and those below, equivalent to two 36-week courses, is a concentration sequence. Students wishing to complete a specialization may take additional courses based on their career pathways. A program completer is a student who has met the requirements for a CTE concentration sequence and all other requirements for high school graduation or an approved alternative education program.

- Accounting (6320/36 weeks)
- Accounting, Advanced (6321/36 weeks)
- Business Law (6131/36 weeks)
- Business Law (6132/18 weeks)
- Business Management (6135/36 weeks)
- Business Management (6136/18 weeks)
- Computer Information Systems (6612/36 weeks)
- Computer Information Systems (6614/18 weeks)
- Computer Information Systems, Advanced (6613/36 weeks)
- Computer Information Systems, Advanced (6615/18 weeks)
- Design, Multimedia, and Web Technologies (6630/36 weeks)
- Design, Multimedia, and Web Technologies (6632/18 weeks)
- Design, Multimedia, and Web Technologies, Advanced (6631/36 weeks)
- Design, Multimedia, and Web Technologies, Advanced (6633/18 weeks)
- Digital Applications (6611/36 weeks)
- Digital Applications (6617/18 weeks)
- Information Technology Fundamentals (6670/36 weeks)
- International Baccalaureate Business Management (IB6135/36 weeks)
- International Baccalaureate Information Technology in a Global Society (IB6613/36 weeks)
- Office Administration (6622/18 weeks)
- Office Administration (6621/36 weeks)
- Office Specialist I--Preparation (6740/36 weeks)
- Office Specialist II--Preparation (6741/36 weeks)
- Office Specialist III--Preparation (6742/36 weeks)
- Principles of Business and Marketing (6116/18 weeks)
- Principles of Business and Marketing (6115/36 weeks)

### Career Cluster: Business Management and Administration

<table>
<thead>
<tr>
<th>Pathway</th>
<th>Occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Support</td>
<td>Administrative Assistant</td>
</tr>
<tr>
<td></td>
<td>Court Reporter</td>
</tr>
<tr>
<td></td>
<td>Legal Assistant</td>
</tr>
<tr>
<td></td>
<td>Office Manager</td>
</tr>
<tr>
<td></td>
<td>Paralegal</td>
</tr>
<tr>
<td></td>
<td>Records Processing Assistant</td>
</tr>
<tr>
<td>Business Information Management</td>
<td>Administrative Assistant</td>
</tr>
<tr>
<td></td>
<td>Customer Service Representative</td>
</tr>
<tr>
<td></td>
<td>Executive Assistant</td>
</tr>
<tr>
<td></td>
<td>Paralegal</td>
</tr>
<tr>
<td></td>
<td>Receptionian</td>
</tr>
<tr>
<td></td>
<td>Word Processor</td>
</tr>
</tbody>
</table>

### Career Cluster: Government and Public Administration

<table>
<thead>
<tr>
<th>Pathway</th>
<th>Occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign Service</td>
<td>Diplomatic Courier</td>
</tr>
<tr>
<td></td>
<td>Foreign Service Worker</td>
</tr>
<tr>
<td></td>
<td>Interpreter/Translator</td>
</tr>
<tr>
<td>Governance</td>
<td>Legislative Aide</td>
</tr>
<tr>
<td></td>
<td>Legislator</td>
</tr>
<tr>
<td></td>
<td>Lobbyist</td>
</tr>
<tr>
<td>National Security</td>
<td>Combat Specialty Officer</td>
</tr>
<tr>
<td></td>
<td>Military Enlisted Personnel</td>
</tr>
<tr>
<td></td>
<td>Military Intelligence Specialist</td>
</tr>
<tr>
<td></td>
<td>Military Officer</td>
</tr>
<tr>
<td></td>
<td>Special Forces Personnel</td>
</tr>
<tr>
<td>Planning</td>
<td>Actuarial Analyst</td>
</tr>
<tr>
<td></td>
<td>Economic Development Coordinator</td>
</tr>
<tr>
<td></td>
<td>Economist</td>
</tr>
<tr>
<td></td>
<td>Interviewer</td>
</tr>
<tr>
<td></td>
<td>Urban and Regional Planner</td>
</tr>
<tr>
<td>Public Management and Administration</td>
<td>Court Clerk</td>
</tr>
<tr>
<td></td>
<td>Eligibility Specialist</td>
</tr>
<tr>
<td></td>
<td>Government Accountant/Auditor</td>
</tr>
<tr>
<td>Career Cluster: Government and Public Administration</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Pathway</strong></td>
<td><strong>Occupations</strong></td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Mail Carrier &amp; Postal Service Clerk</td>
<td>- Mail Carrier&lt;br&gt;- Postal Service Clerk&lt;br&gt;- Postmaster/Mail Superintendent</td>
</tr>
<tr>
<td><strong>Regulation</strong></td>
<td>- Aviation Inspector&lt;br&gt;- Compliance Officer&lt;br&gt;- Environmental Compliance Inspector&lt;br&gt;- Financial Analyst&lt;br&gt;- Financial Manager&lt;br&gt;- Private Detective, Investigator&lt;br&gt;- Transit Vehicle Inspector</td>
</tr>
<tr>
<td><strong>Revenue and Taxation</strong></td>
<td>- Compliance Officer&lt;br&gt;- Financial Analyst&lt;br&gt;- Financial Manager&lt;br&gt;- Real Estate Appraiser&lt;br&gt;- Revenue Agent</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Career Cluster: Information Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pathway</strong></td>
</tr>
<tr>
<td>---------------------------------------</td>
</tr>
<tr>
<td>Information Support and Services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Career Cluster: Law, Public Safety, Corrections and Security</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pathway</strong></td>
</tr>
<tr>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>Legal Services</td>
</tr>
</tbody>
</table>