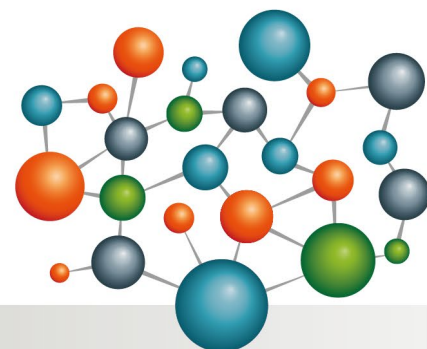


PROGRAM OF STUDY

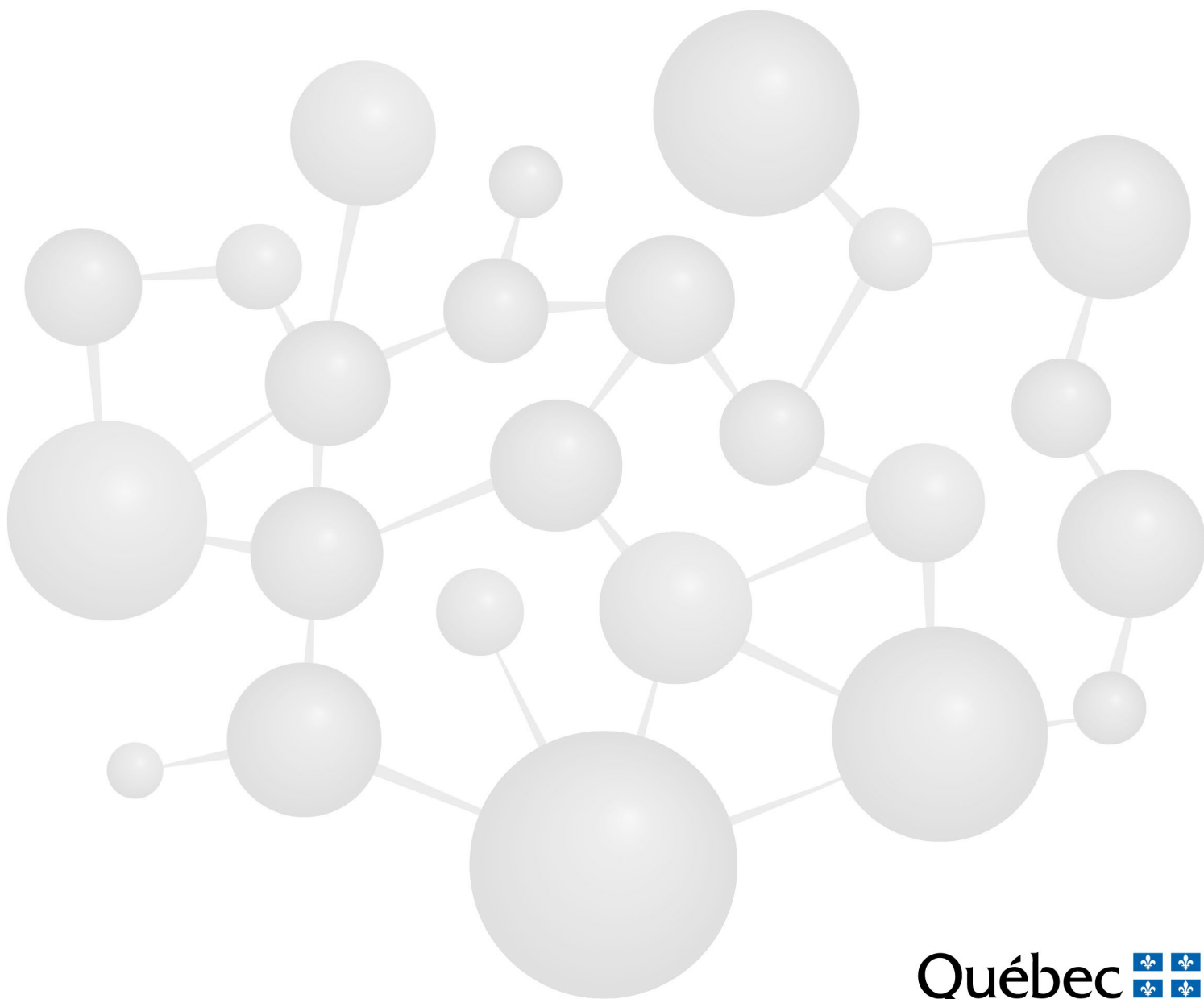
SECRETARIAL STUDIES LEGAL (AVS 5873)

Training sector

ADMINISTRATION, COMMERCE AND COMPUTER TECHNOLOGY



MINISTÈRE DE L'ÉDUCATION



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Introduction to the Program

In vocational training, a program of study presents the competencies required to practise a given trade or occupation at entry level on the job market. The training provided allows students to acquire a degree of versatility that will be useful in their career and personal development.

A program is a coherent set of competencies to be developed. It outlines the knowledge and broad orientations to be favoured during training. The competencies correspond to the tasks of the trade or occupation or to activities related to work, vocational or personal life, depending on the case. Learning is acquired in a specific achievement context and targets the ability to act, succeed and evolve.

According to the Education Act,¹ every program “shall include compulsory objectives and contents and may include optional objectives and contents that shall be enriched or adapted according to the needs of students who receive the services.” For behavioural competencies, the compulsory components include the statement of the competency, the elements of the competency, the achievement context and the performance criteria; for situational competencies, they include the corresponding components.

For information purposes, programs also provide a grid of competencies, educational aims, a summary of competency-related knowledge and know-how, and guidelines. They also specify the suggested duration of each competency. All optional components of a program may be enriched or adapted according to the needs of the students, the environment and the workplace.

Program Components

Program Goals

Program goals consist of the expected outcome at the end of training as well as a general description of a given trade or occupation. They also include the four general goals of vocational training.

Educational Aims

Educational aims are broad orientations to be favoured during training in order to help students acquire intellectual or motor skills, work habits or attitudes. Educational aims usually address important aspects of career and personal development that have not been explicitly included in the program goals or competencies. They serve to orient appropriate teaching strategies to contextualize students' learning, in keeping with the dimensions underlying the practice of a trade or occupation. They help guide educational institutions in implementing the program.

Competency

A competency is the ability to act, succeed and evolve in order to adequately perform tasks or activities related to one's working or personal life, based on an organized body of knowledge and skills from a variety of fields, perceptions, attitudes, etc.

A competency in vocational training can be defined in terms of a behaviour or a situation and includes specific practical guidelines and requirements for learning.

¹ *Education Act*, CQLR, c. I-13.3, s. 461

1. Behavioural Competency

A behavioural competency describes the actions and the results expected of the student. It consists of the following features:

- The *statement of the competency* is the result of the job analysis, the orientations and general goals of vocational training and other determinants.
- The *elements of the competency* correspond to essential details that are necessary in order to understand the competency and are expressed in terms of specific behaviours. They refer to the major steps involved in performing a task or to the main components of the competency.
- The *achievement context* corresponds to the situation in which the competency is exercised at entry level on the job market. The achievement context attempts to recreate an actual work situation but does not describe a learning or evaluation situation.
- The *performance criteria* define the requirements to be respected. They may refer to elements of the competency or to the competency as a whole. When associated with a specific element, performance criteria are used to judge whether a competency has been acquired. When associated with the competency as a whole, the criteria describe the requirements for performing a task or activity and provide information on the expected level of performance or the overall quality of a product or service.

2. Situational Competency

A situational competency describes the situation in which students are placed to acquire learning and allows for actions and results to vary from one student to another. It consists of the following features:

- The *statement of the competency* is the result of the job analysis, the orientations and general goals of vocational training and other determinants.
- The *elements of the competency* outline the essential aspects of the competency and ensure a better understanding of the competency with respect to the expected outcome. The elements of the competency are fundamental to the implementation of the learning situation.
- The *learning context* provides a broad outline of the learning situation designed to help the students develop the required competency. It is normally divided into three key phases of learning: information, participation and synthesis.
- The *instructional guidelines* provide reference points and means for teachers to ensure that learning takes place and that the context in which it occurs is always the same. These guidelines may include general principles or specific procedures.
- The *participation criteria* describe requirements that the students must meet when participating in learning activities. They focus on how the students take part in the activities rather than on the results obtained. Participation criteria are normally provided for each phase of the learning situation.

Competency-Related Knowledge and Know-How

Competency-related knowledge and know-how, together with related guidelines, are provided for information purposes. Competency-related knowledge and know-how define the essential and meaningful learning that students must acquire in order to apply and continue to develop the competency. They are in keeping with the job market and are accompanied by guidelines that provide information about the field of application, level of complexity and learning content. They generally encompass learning associated with knowledge, skills, strategies, attitudes, perceptions, etc.

Duration

The total duration of the program is compulsory and must be observed. It consists of teaching time, which includes time for the evaluation of learning and for enrichment or remedial activities, depending on the students' needs. The duration indicated for a given competency refers to the amount of time needed to develop the competency.

The amount of teaching time corresponds to the amount of time allotted to training, which is established during program development as the average amount of time needed to acquire a competency and evaluate learning. This duration is helpful in organizing training.

Credit

A credit is a unit used for expressing the quantitative value of each competency. One credit corresponds to 15 hours of training.

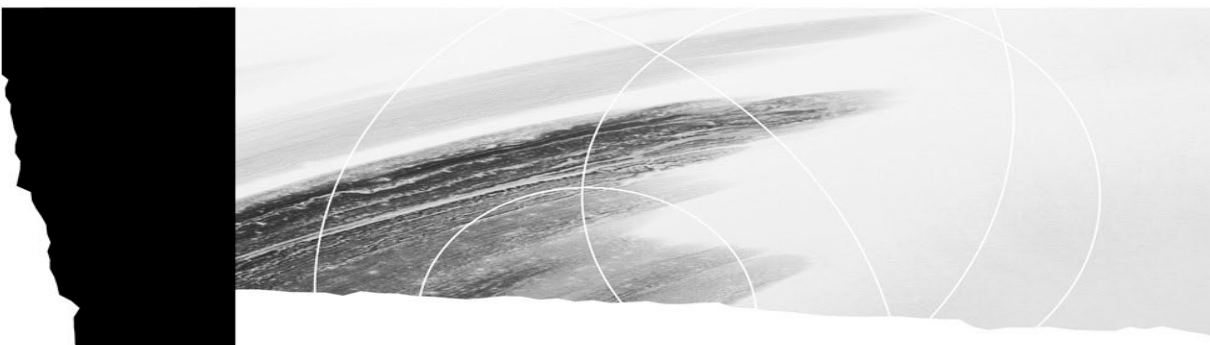
Aspects of Program Implementation

Program-Based Approach

The program-based approach is founded on a comprehensive view of a program of study and its components (e.g. goals, educational aims, competencies). It requires concerted action among all players involved, from the initial stages of program design and development to program implementation and evaluation. It consists in ensuring that all of the actions and activities proposed are based on the same aims and take into account the same orientations. For students, the program-based approach makes training more meaningful as it presents learning as a coherent whole.

Competency-Based Approach

In vocational training, the competency-based approach is based on a teaching philosophy that is designed to help students mobilize their own individual sets of resources in order to act, succeed and evolve in different contexts, according to established performance levels with all the required knowledge and know-how (e.g. skills, strategies, attitudes, perceptions).



5873

Secretarial Studies-Legal

Year of approval: 2020

Certification:	Attestation of Vocational Specialization
Number of credits:	30
Number of competencies:	11
Total duration:	450 hours

To be eligible for admission to the *Secretarial Studies-Legal* program, candidates must meet one of the following requirements:

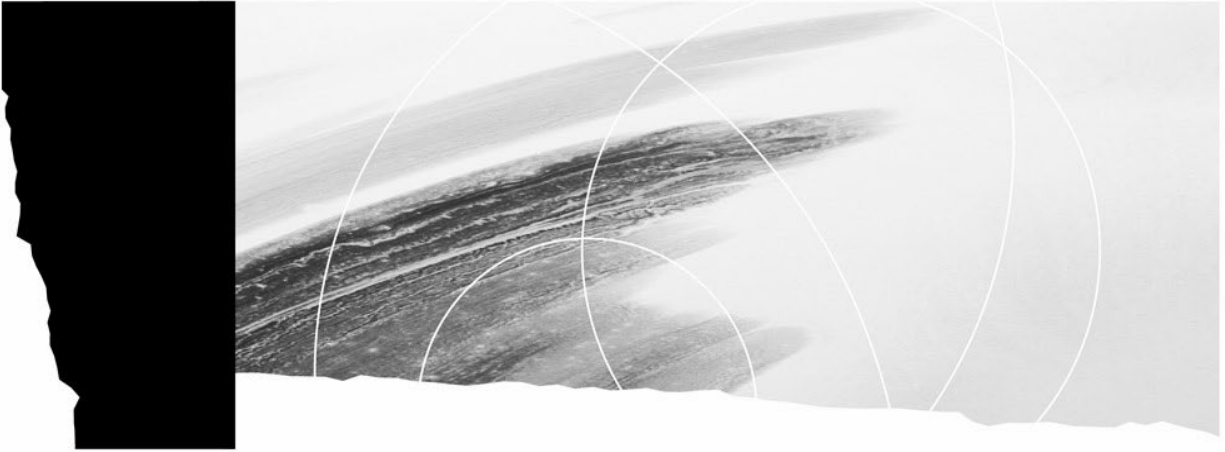
- The candidate must hold one of the following diplomas of vocational studies, or have been granted recognition of equivalent learning:
 - 5357 *Secrétariat*
 - 5857 *Secretarial Studies*

OR

- The candidate must exercise a trade or profession related to the program of study.

The duration of the program is 450 hours, which includes 360 hours spent on the specific competencies required to practise the trade or occupation and 90 hours on general, work-related competencies. The program of study is divided into 11 competencies which vary in length from 15 to 105 hours. The total hours allocated to the program include time devoted to teaching, evaluation of learning and enrichment or remedial activities.

Competency	Code	Number	Hours	Credits
The Occupation and the Training Process	948201	1	15	1
Legal Terminology and Technical Vocabulary	948212	2	30	2
Business Law Forms and Documents	948222	3	30	2
Preparation of Civil Pleadings	944232	4	30	2
Contentious Pleadings	948244	5	60	4
Applications in the Course of Proceeding, Requests for Setting Down and Applications for Execution	948252	6	30	2
Interactions in a Legal Context	948261	7	15	1
Notarial Practice Files	948275	8	75	5
Civil Pleadings in Contentious Family Matters	948282	9	30	2
Non-Contentious Applications	948292	10	30	2
Entering the Workforce	948307	11	105	7



Part I

Program Goals

Educational Aims

Statements of the Competencies

Grid of Competencies

Harmonization

Program Goals

The *Secretarial Studies-Legal* program prepares students to practise the occupation of legal secretary.

Legal secretaries work in a variety of legal environments in the public, parapublic and private sectors, including government departments, legal services, litigation departments, lawyers' offices, notaries' offices, bailiffs' offices, courts, cities and municipalities. They also work in different fields of the legal profession, such as civil law, business law, family law, notarial practice and municipal law.

To do their job, legal secretaries must understand legal terminology. They are asked to perform activities in connection with the processing of legal and administrative files. Depending on the field of the legal profession in which they work, they produce or prepare documents relating to business law, pleadings for contentious and non-contentious civil or family cases, documents relating to claims, applications and performance orders, and documents for notarial files. In addition, they are required to carry out tasks of an administrative nature specific to the legal profession, as well as general secretarial tasks.

As part of their profession, legal secretaries must also comply with rules of conduct and professional ethics, and must behave professionally in the workplace, where they are required to interact or work with a variety of people in different roles.

Legal secretaries must have the following skills: mastery of written and spoken French and English; good organizational skills; the ability to set priorities and adapt to change; efficiency and speed of execution; effective stress management skills; a rigorous and conscientious approach to work; and a professional demeanour when interacting with others.

The program goals of the *Secretarial Studies-Legal* program are based on the general goals of vocational training. These goals are as follows:

- To help students develop effectiveness in the practice of an occupation, that is:
 - to teach students to perform roles, functions, tasks and activities associated with the occupation upon entry into the job market
 - to prepare students to progress satisfactorily on the job (which implies having the technical and technological knowledge and skills in such areas as communication, problem solving, decision making, ethics, health and safety)
- To help students integrate into the workforce, that is:
 - to familiarize students with the job market in general, and with the specific context of their chosen occupation
 - to familiarize students with their rights and responsibilities as workers
- To foster students' personal development and acquisition of occupational knowledge, skills, perceptions and attitudes, that is:
 - to help students develop their autonomy and ability to learn, and acquire effective work methods
 - to help students understand the principles underlying the techniques and the technology used in the occupation
 - to help students develop self-expression, creativity, initiative and entrepreneurial spirit
 - to help students adopt the attitudes required to successfully practise the occupation, and instill in them a sense of responsibility and a concern for excellence

- To promote job mobility, that is:
 - to help students develop positive attitudes toward change
 - to help students develop the means to manage their careers by familiarizing them with entrepreneurship

Educational Aims

The aim of the *Secretarial Studies-Legal* program is to help students develop attitudes and behaviours that representatives from education and the field deem essential to the practice of the occupation:

- a rigorous approach to their duties, in a context where errors can be damaging
- autonomy
- the ability to adapt
- effective stress management
- a professional demeanour

Statements of the Competencies

List of Competencies

- Determine their suitability for the occupation and the training process.
- Use legal terms and technical vocabulary.
- Produce business law forms and documents.
- Carry out activities relating to the preparation of civil pleadings.
- Prepare contentious pleadings.
- Prepare applications in the course of proceeding, requests for setting down and applications for execution.
- Interact in a legal context.
- Produce notarial practice files.
- Prepare civil pleadings in contentious family matters.
- Prepare non-contentious applications.
- Enter the workforce.

Grid of Competencies

The grid of competencies shows the relationship between general competencies, which correspond to work-related activities, and specific competencies, which are required to practise the particular trade or occupation.

The general competencies appear on the horizontal axis and the specific competencies, on the vertical axis. The symbol (○) indicates a correlation between a general and a specific competency. Shaded symbols indicate that these relationships have been taken into account in the acquisition of specific competencies. The logic used in constructing the grid influences the course sequence. Generally speaking, this sequence follows a logical progression in terms of the complexity of the learning involved and the development of the students' autonomy. The vertical axis presents the specific competencies in the order in which they should be acquired and serves as a point of departure for determining how all of the competencies will be taught.

GRID OF COMPETENCIES								
SPECIFIC COMPETENCIES	Competency number	Type of competency	Duration (in hours)	GENERAL COMPETENCIES				TOTAL
				Determine their suitability for the occupation and the training process	Use legal terms and technical vocabulary	Carry out activities relating to the preparation of civil pleadings	Interact in a legal context	
	Competency number			1	2	4	7	90
	Type of competency			S	B	B	S	
	Duration (in hours)			15	30	30	15	
Produce business law forms and documents	3	B	30	○	●	○	○	90
Prepare contentious pleadings	5	B	60	○	●	●	○	
Prepare applications in the course of proceeding, requests for setting down and applications for execution	6	B	30	○	●	●	○	
Produce notarial practice files	8	B	75	○	●	○	●	
Prepare civil pleadings in contentious family matters	9	B	30	○	●	●	●	
Prepare non-contentious applications	10	B	30	○	●	●	●	
Enter the workforce	11	S	105	●	○	○	○	
Total duration			360					460

Links between the general competencies and the specific competencies

- : Existence of a link
- : Application of a link

Harmonization

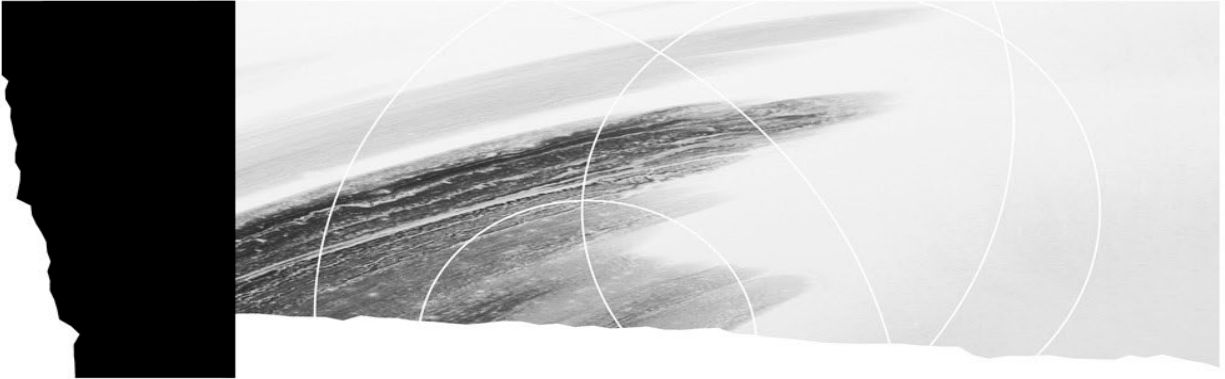
The Ministère de l'Éducation harmonizes its vocational and technical programs by establishing similarities and continuity between secondary- and college-level programs within a particular sector or between sectors in order to avoid overlap in program offerings, to recognize prior learning and to optimize the students' progress.

Harmonization establishes consistency between training programs and is especially important in ensuring that the tasks of a trade or occupation are clearly identified and described. Harmonization makes it possible to identify tasks requiring competencies that are common to more than one program. Even if there are no common competencies, training programs are still harmonized.

Harmonization is said to be “inter-level” when it focuses on training programs at different levels, “intra-level” when it focuses on programs within the same educational level, and “inter-sector” when carried out between programs in various sectors.

An important aspect of harmonization is that it allows the common features of competencies to be identified and updated as needed. Common competencies are those that are shared by more than one program; once acquired in one program, they can be recognized as having been acquired in another. Competencies with exactly the same statement and elements are said to be identical. Common competencies that are not identical but have enough similarities to be of equal value are said to be equivalent.

The *Secretarial Studies-Legal* program does not share any competencies with other programs at this time.



Part II

Program Competencies

Competency 1 Duration 15 hours Credits 1

Situational Competency

Statement of the Competency

Determine their suitability for the occupation and the training process.

Elements of the Competency

- Become aware of the realities of the occupation.
- Become familiar with the program of study and the training.
- Confirm their career choice.

Learning Context

Information Phase

- Learning about the general characteristics of the job market for legal secretaries:
 - workplaces
 - organization of work, job prospects and remuneration
 - opportunities for promotion, transfer or entrepreneurship
- Learning about the nature and requirements of the occupation: tasks to be performed, conditions of employment, performance requirements, physical requirements, stress factors, skills, aptitudes, qualities, attitudes and knowledge, customer service, organization, etc.
- Learning about the rules of conduct and professional ethics applicable to the work of a legal secretary
- Learning about health and safety risks applicable to the occupation of legal secretary
- Learning about the possibilities for ongoing professional development
- Learning about the program of study and the training process: competencies to be acquired, length of the program, learning activities and evaluation methods, etc.

Participation Phase

- Discussing the information gathered and their perceptions of the occupation: requirements, advantages and disadvantages
- Identifying the connections between the program of study and the specific tasks of a legal secretary
- Seeking ways to foster academic success and entry into the workforce

Synthesis Phase

- Producing a report
- Confirming their career choice by comparing their own profile to the aspects and requirements of the occupation

Instructional Guidelines

- Foster a climate of trust where participants can express themselves freely, respectfully and openly
- Ensure that the relevant information is available: information about the occupation, the program of study, the training process, etc.
- Provide the students with the support they need.
- Encourage the students to take part in the proposed activities.
- Encourage the students to develop a realistic view of the occupation.
- Provide the students with means to assess their career choice honestly and objectively.

Participation Criteria

Information Phase

- Gather information on the topics to be covered.
- Select relevant, reliable information sources.
- Attend a meeting (synchronous or asynchronous) with a specialist working in the occupation.

Participation Phase

- Take part in the activities that have been organized.
- Make connections between the program of study and the requirements of the occupation.
- Express their opinion of the requirements that must be met to exercise the occupation.

Synthesis Phase

- Produce a report that includes:
 - a short description of their skills, aptitudes, qualities, attitudes, fields of interest and challenges
 - an explanation of their career choice that explicitly makes the requested connections

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each phase of the learning context, along with their attendant guidelines.

Information Phase

- Information sources: report analyzing the occupation of legal secretary, program of study, websites describing the occupation, presentations by professionals exercising the profession or their supervisors
- Formats of presentations by specialists working in the occupation: synchronous (in-person meeting, telephone conference or videoconference) or asynchronous (audio or video recording)
- Nature and requirements of the occupation: tasks to be performed, conditions of employment, performance requirements, physical requirements, stress factors and health and safety risks (workstation ergonomics, discomfort caused by being seated and working in front of a screen, discomfort from repetitive movements, workplace harassment, burnout, adaptation problems, etc.)

- Job market: workplaces, organization of work, employment prospects, remuneration, opportunities for promotion (legal technician, magistrate's clerk, court clerk, etc.), entrepreneurship, etc.
- Organization of the courts
- Differences between the roles and responsibilities of the various members of the legal community (judges, lawyers, notaries, legal technicians, paralegals, bailiffs, clerks, court reporters, legal translators, health and social service professionals [social workers, physicians], opposing parties, etc.)
- Rules of conduct and professional ethics applicable to the work of legal secretaries: professional secrecy, confidentiality, discretion, loyalty, integrity, diligence, rigour, honesty, impartiality, etc.
- Information about the training: skills to be developed, duration of the training for each of the competencies, duration of the training program, types of evaluation, learning methods, pedagogical and didactic aspects, conditions of attendance, particular requirements, applicable internal rules, etc.
- Ongoing professional development: new trends, new techniques, legislative changes, etc.
- Strategies for searching for and summarizing information

Participation Phase

- Characteristics and requirements of the occupation: skills, aptitudes, qualities, attitudes, knowledge required to exercise the occupation, tasks to be performed
- Characteristics and requirements of the training: program of study, evaluation, certification of studies, the institution's rules, student services, timetable, personal investment in the training, etc.
- Connections between the program competencies
- Connections between the program competencies and the requirements of the occupation, including the tasks to be performed, and the skills, aptitudes, qualities, attitudes and knowledge needed to exercise the occupation

Synthesis Phase

- Possible presentation methods: notes, summary and oral presentation, in person or remotely
- Objective review of their own strengths and challenges with respect to the training and the requirements of the occupation
- Justification of their career choice

Competency 2

Duration 30 hours

Credits 2

Behavioural Competency

Statement of the Competency

Use legal terms and technical vocabulary.

Achievement Context

- For common legal terms and technical vocabulary used verbally or in writing in a variety of materials:
 - contentious and non-contentious procedures, family matters, notarial practice, business law, etc.
- Under the responsibility of a professional
- Based on:
 - simple written documents (letters, emails, etc.)
 - a variety of verbal or written instructions
- Using:
 - models
 - the necessary equipment, materials and technological tools
 - various sources of information, including legal lexicons, specialist websites, legislative texts, etc.

Elements of the Competency

Performance Criteria

1. Receive a request or an instruction.

- Accurate determination of the nature of the request or instruction
- Correct interpretation of the message received
- Accuracy of the common legal terms or technical vocabulary used

2. Convey information verbally.

- Compliance with the requests or instructions
- Accuracy of the common legal terms or technical vocabulary used
- Clarity of the message conveyed

3. Prepare correspondence.

- Compliance with the requests or instructions
- Accuracy of the common legal terms or technical vocabulary used
- Compliance with the rules for drafting documents
- Impeccable presentation of documents

For the competency as a whole:

- Adoption of rigorous, effective work methods
- Use of relevant sources of information
- Quality of French or English

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of effective, rigorous work methods: work planning method, revision method, correction method, etc.
- Terminology memorization strategies: connections between different terms, etymology of the terms, particular formulations, etc.
- Sources of information: glossaries, lexicons, dictionaries, etc.; function and utility of the sources of information; consequences of errors caused by using unreliable or irrelevant sources of information, etc.
- Identification of relevant information and additional research within the information sources
- Varied requests or instructions: various easy-to-write documents, terms relating to different fields of law, different people, different contexts, etc.
- Impacts of using incorrect legal terms on the quality of legal documents, case follow-up and workplace image
- Correction of mistakes: spelling, grammar, punctuation and capitalization

1 Receive a request or instruction.

- Main fields of law
- Common legal terms and technical vocabulary: meaning, connections with different fields of law, connections between terms of the same nature or relating to the same field of law, etc.
- Consequences of errors caused by establishing incorrect connections between common legal terms
- Importance of correctly interpreting the common legal terms and technical vocabulary used in the instructions

2 Convey information verbally.

- Use of common legal terms and technical vocabulary in verbal communication (interactions with members of the legal community, clients, professionals, etc.)
- Importance of adopting an appropriate level of language for the interlocutor, and of using accurate terminology in legal workplaces

3 Draft correspondence.

- Use of common legal terms and technical vocabulary in written communication (drafting of simple documents: notices, letters, emails, short texts, etc.)
- Importance of correctly understanding the common legal terms and technical vocabulary used in the instructions
- Importance of using relevant common legal terms and technical vocabulary
- Document presentation: paper format, margins, fonts, line spacing, impeccable presentation, etc.

Competency 3

Duration 30 hours

Credits 2

Behavioural Competency

Statement of the Competency

Produce business law forms and documents.

Achievement Context

- For:
 - registration and constitution of different types of businesses: sole proprietorships, partnerships, corporations
 - various forms and documents such as declarations of registration, articles of incorporation, annual updating declarations, notices, resolutions, bylaws, agreements, etc.
- Based on:
 - contextualizations and various verbal or written instructions
- Using:
 - forms or models
 - the necessary equipment, materials and technological tools
 - the applicable legislation and regulations, etc.

Elements of the Competency**Performance Criteria**

1 Organize the work.

- Correct interpretation of instructions
- Appropriate choice of form or model document
- Identification of information relevant to the preparation of the form or document
- Recording of relevant information
- Obtaining of the necessary documents and information
- Proper planning of the steps to be carried out

2 Complete the form.

- Compliance with the instructions for the chosen form
- Relevance of the data entered on the form
- Consistency of the data entered on the form

3 Prepare the document.

- Compliance with the instructions for the chosen document
- Relevance of the information entered in the document
- Selection of appropriate clauses or paragraphs
- Accurate text entry
- Compliance with page layout rules
- Impeccable presentation of the documents

- | | |
|--|---|
| 4 Ensure that the work is of good quality. | <ul style="list-style-type: none">• Full revision of the form or document• Exhaustive identification of content errors• Accurate correction of errors |
| 5 Carry out the steps subsequent to the preparation of the form or document. | <ul style="list-style-type: none">• Proper submission of the draft form or document to the person or people concerned• Preparation of appropriate correspondence• Accurate identification of next steps and time frames• Proper filing of the form or document |

For the competency as a whole:

- Adoption of effective, rigorous work methods
- Accurate use of common legal terms and technical vocabulary
- Effective use of different sources of information
- Quality of French or English

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of rigorous, effective work methods (review of Competency 2)
 - Common legal terms and technical vocabulary specific to business law
 - Source of information specific to business law: glossaries, lexicons, dictionaries, etc. (review of Competency 2)
 - Correction of errors (review of Competency 2)
- 1 Organize the work.
- Various instructions: different types of businesses, various parties, different contexts, different levels of complexity, etc. (review of Competency 2)
 - Distinction between a natural person and a legal person

- Distinction between constitution as a legal person at the provincial level and constitution as a legal person at the federal level
 - Forms and documents to be produced according to the type of business: government forms, resolutions, share certificates, bylaws, share capital, etc.
- 2 Complete the form.
 - Forms: registration, constitution, initial declaration, annual updating, current updating, correction, etc.
 - Business name: applicable legislation, search and reservation, etc.
 - Applicable legislation and regulations: *Civil Code of Québec, Business Corporations Act, Companies Act, Canada Business Corporations Act, Act respecting the legal publicity of enterprises*, etc.
 - Relevant information: types of businesses, title and content of various documents, identification of individuals and their positions (owners, partners, directors, shareholders, etc.), dates, signatories, etc.
 - Compliance with time frames and time limits: time frame for producing certain documents, consequences of failing to comply with time limits, etc.
 - Instructions for each form to be completed
 - 3 Prepare the document.
 - Instructions for each document to be prepared
 - Sentences and paragraphs: choice, consistency, etc.
 - Presentation of the document (review of Competency 2)
 - 4 Ensure that the work is of good quality.
 - Content errors: choice of form or document, consistency of information (information on the parties or professionals, document title, legal terms, dates), etc.
 - 5 Carry out the steps subsequent to the preparation of the form or document.
 - Submission procedures: people concerned, methods used, time limits, etc.
 - Corrections or changes requested
 - Transmission of forms to the Enterprise Register: methods, costs, return of documents, etc.
 - Organization of the company's books: bylaws, resolution, share certificate, etc.
 - Correspondence: for clients, for other people involved in the case, etc. (review of Competency 2).
 - Steps subsequent to preparation: next step in the process, entry of next steps and time frames, follow-up required, etc.
 - Methods of filing forms and documents

Competency 4

Duration 30 hours

Credits 2

Behavioural Competency

Statement of the Competency

Carry out activities relating to the preparation of civil pleadings.

Achievement Context

- For first instance civil pleadings
- Under the responsibility of a professional
- Based on:
 - a set of facts from which procedural principals can be identified and applied
 - contextualizations and various verbal and written instructions
- Using:
 - model pleadings: header, signature block, certified copy, etc.
 - time limit calculation tools
 - the necessary equipment, materials and technological tools
 - the applicable legislation and regulations, etc.

Elements of the Competency

Performance Criteria

- | | |
|--|---|
| 1 Draft headers. | <ul style="list-style-type: none"> • Compliance of the pleading header • Accuracy of the written information • Compliance with the rules of written pleadings • Compliance with the model |
| 2 Calculate the period. | <ul style="list-style-type: none"> • Accurate identification of the period to be calculated • Careful application of the rules governing the calculation of periods • Accurate determination of the date |
| 3 Prepare signature blocks. | <ul style="list-style-type: none"> • Compliance of the signature block and the note regarding the certified copy • Accuracy of the written information • Compliance with the rules of written pleadings • Compliance with the model |
| 4 Prepare the reverse sides of pleadings and exhibits. | <ul style="list-style-type: none"> • Application of formatting rules • Compliance with the model • Accuracy of the information written on the reverse sides of the pleadings • Compliance of reverse sides and related exhibits |

- 5 Assemble pleadings and attachments.
- Rigorous assembly of pleadings and attachments
 - Rigorous assembly of exhibits and reverse sides

For the competency as a whole:

- Adoption of rigorous, effective work methods
- Accurate use of common legal terms and technical vocabulary
- Effective use of different sources of information
- Neat presentation of documents
- Quality of French or English

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of rigorous, effective work methods (review of Competency 2)
- Common legal terms and technical vocabulary specific to the preparation of civil pleadings: in French or in English
- Various instructions: different contexts, different principles to be applied, different levels of complexity, etc.
- Sources of information specific to the preparation of civil pleadings: *Code of Civil Procedure*, websites of interest, reference handbooks adapted to legal secretarial work, legislation, etc. (review of Competency 2)
- Document presentation (review of Competency 2)
- Correction of errors (review of Competency 2)

1 Draft headers.

- Difference between civil law and criminal and penal law
- Difference between various civil pleading documents: originating application, answer, case protocol, defence, etc.
- Steps in the processing of a contentious civil case: demand letter, originating application, answer, declaration of preliminary exceptions, case protocol, case management conference, settlement conference, defence, etc.
- Steps in the processing of a contentious family case: originating application, application for divorce, answer, declaration of preliminary exceptions, case protocol, defence, etc.
- Steps in the processing of a non-contentious case: originating application, notice of presentation, ruling, etc.
- Header content: judicial district, case number and court of jurisdiction
- Designation and quality of the parties: applicant, defendant, legal person, natural person, etc.
- Pleading title: formatting, sections of laws, dispute code, etc.

2 Calculate the period.

- Prescription periods: acquisitive prescription and extinctive prescription for different topics
- Service period and notification period

- Calculation of the period: statutory holidays, court schedule, periods in days, periods in months, tools, calculation methods, etc.
 - Determination of the exact date
- 3 Prepare signature blocks.
- Elements of the signature block: position, signatory, information required, variants, etc.
 - Certified copy of a pleading: position, signatory, information required, variants, etc.
- 4 Prepare the reverse sides of pleadings and exhibits.
- Identification of exhibits according to the pleading to which they are attached
 - Information required: contact information for the lawyer or notary, other details depending on the court, title, code, etc.
- 5 Assemble pleadings and attachments.
- Methods used to assemble pleadings, documents, reverse sides and copies
 - Assembly of exhibits and reverse sides

Competency 5 Duration 60 hours Credits 4

Behavioural Competency

Statement of the Competency

Prepare contentious pleadings.

Achievement Context

- For first instance civil pleadings:
 - originating applications, answers, case protocols, defences, cross-applications, notices of settlement, etc.
 - civil disputes other than contentious family matters
- Under the authority of a lawyer
- Based on:
 - contextualizations and various written or verbal instructions
 - a written or dictated text
- Using:
 - models
 - calculation tools
 - the necessary equipment, materials and technological tools
 - the applicable legislation and regulations, etc.

Elements of the Competency**Performance Criteria**

- | | |
|----------------------------|---|
| 1 Organize the work. | <ul style="list-style-type: none"> • Correct interpretation of instructions. • Identification of relevant information. • Accurate identification of the work to be done • Careful choice of the model pleading • Accurate identification of the information and documents to be obtained |
| 2 Prepare a formal notice. | <ul style="list-style-type: none"> • Compliance of the legal content • Application of formatting rules • Impeccable presentation of documents |
| 3 Prepare the pleading. | <ul style="list-style-type: none"> • Compliance with the instructions, context and stage of the procedure • Accuracy of the data entered in the pleading • Consistency of the elements of the pleading with the context • Application of formatting rules • Impeccable presentation of documents |

- | | |
|--|--|
| 4 Produce the documents and exhibits. | <ul style="list-style-type: none"> • Correct production of the required documents and exhibits • Consistency between the information entered on the documents and exhibits and the pleading • Compliant production of the book of authorities • Application of formatting rules |
| 5 Ensure that the work is of good quality. | <ul style="list-style-type: none"> • Full revision of the pleading, documents and exhibits • Exhaustive identification of content errors • Accurate correction of errors |
| 6 Carry out the steps subsequent to the preparation of the pleading. | <ul style="list-style-type: none"> • Proper submission of the draft pleading, documents and exhibits to the person or people concerned • Correctly prepared certified copies • Rigorous assembly of the pleading, documents, exhibits and reverse sides • Compliance with the procedures for the transmission of the required documents • Correctly prepared correspondence • Accurate identification of the next steps and time limits • Proper filing of the pleading, documents and exhibits |

For the competency as a whole:

- Adoption of effective, rigorous work methods
- Accurate use of common legal terms and technical vocabulary
- Effective use of different sources of information
- Quality of French or English

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of rigorous, effective work methods (review of Competency 2)
- Common legal terms and technical vocabulary specific to contentious civil pleadings: in French or English
- Sources of information specific to contentious civil pleadings: *Code of Civil Procedure*, websites of interest, reference handbooks adapted to legal secretarial work, legislation, etc. (review of Competency 2)
- Correction of errors (review of Competency 2)

- 1 Organize the work.
 - Various instructions: different types of disputes, different contexts, different parties, different districts, different levels of complexity, etc. (review of Competency 2)
 - Different types of civil recourses and disputes
 - Identification of tasks to be performed depending on the stage of the procedure and the instructions (review of Competency 4)
 - Setting of priorities when determining the order in which the tasks will be performed
 - Assessment of the time to be spent on the tasks to be performed
 - Retrieval of relevant information and additional searches of information sources
- 2 Prepare a formal notice.
 - Content of the formal notice: introduction, facts, time limits, conclusion, methods of preventing and resolving disputes, etc.
 - Layout of the formal notice: paper size, margins, fonts, line spacing, alignment, justification, pagination, etc.
 - Formatting of the formal notice: submission method, specific mentions, date, place, heading, reference, subject, salutation, closing, signature, attachments, etc.
- 3 Prepare the pleading.
 - Parties to the pleading: interest, capacity, qualities, etc.
 - Formatting rules for pleadings (review of Competency 4)
 - Procedural steps for contentious civil cases (review of Competency 4)
 - Data in the pleading: header, quality of the parties, contact information of the parties, title, content, lawyer, dates, signature block elements, etc. (review of Competency 4)
 - Text of the pleading: presence of all the required content
 - Dates: calculation of periods (review of Competency 4)
- 4 Produce the documents and exhibits.
 - Preparation and assembly of the original and certified copies of the pleadings, exhibits and documents for the case (review of Competency 4)
 - Recognition of the legal references based on different sources of law: hierarchy of sources, charters, codes, legislation and regulations, case law, doctrine, monographs, journal articles, etc.
 - Preparation of books of authorities: search tools for sources of law, information needed to prepare references, rules governing the presentation of legal references
- 5 Ensure that the work is of good quality.
 - Correction of the draft pleading: changes required, consistency of the text and contextual facts, etc.
 - Content errors: choice of model, information concerning the parties or professionals, document title of the document, legal terms, dates, etc.

- 6 Carry out the steps subsequent to the preparation of the pleading.
- Submission procedures: people concerned, methods used, time limits, etc.
 - Corrections requested by the professional, new instructions, etc.
 - Signature of the application or documents
 - Preparation and assembly of original and certified copies of pleadings, exhibits and documents (review of Competency 4)
 - Transmission of the documents required for a filing with the court clerk, notification or service: applicable rules, time limits, legal fees, etc.
 - Correspondence: email, letter, addressee (client, adverse party, intervenor), etc. (review of Competency 2)
 - Steps subsequent to preparation: next step in the procedure, entry of next steps and time limits, follow-up required, etc.
 - Filing of pleadings, exhibits and documents: proposed filing methods
 - Entry of follow-up notes where applicable, using the tool preferred by the workplace

Behavioural Competency

Statement of the Competency

Prepare applications in the course of proceeding, requests for setting down and applications for execution.

Achievement Context

- In first instance:
 - common applications in the course of proceeding
 - requests for setting down by reason of failure and requests for a trial date and judgment
 - statements of fees, seizures and applications, and notices for execution
- Under the responsibility of a lawyer
- Based on:
 - contextualizations and various verbal and written instructions
 - a dictated or written text
- Using:
 - models
 - calculation tools
 - the necessary equipment, materials and technological tools
 - the applicable legislation and regulations, etc.

Elements of the Competency

Performance Criteria

1 Organize the work.

- Correct interpretation of instructions
- Identification of relevant information
- Accurate identification of the work to be done
- Careful choice of the model
- Accurate identification of the information and documents to be obtained

2 Prepare an application in the course of proceeding, a request for setting down and an application for execution.

- Compliance with instructions, the context and the stage in the procedure
- Accuracy of the data entered in the application or request
- Consistency between the elements of the application or request and the context
- Application of formatting rules
- Impeccable presentation of documents

3 Produce the documents and exhibits.

- Correct production of the required documents and exhibits
- Application of formatting rules
- Consistency of the information entered in the documents, exhibits, and application or request

- 4 Ensure that the work is of good quality.
 - Full revision of the application or request, the documents and the exhibits
 - Exhaustive identification of content errors
 - Accurate correction of errors
- 5 Carry out the steps subsequent to the preparation of the application or request.
 - Proper submission of the draft application or request, documents and exhibits to the person or people concerned
 - Preparation of certified copies
 - Rigorous assembly of the pleading, documents, exhibits and reverse sides
 - Compliance with the procedures for the transmission of the required documents
 - Correct preparation of the correspondence
 - Accurate identification of the next steps and time limits
 - Proper filing of the application or request, documents and exhibits

For the competency as a whole:

- Adoption of effective, rigorous work methods
- Accurate use of common legal terms and technical vocabulary
- Effective use of different sources of information
- Quality of French or English

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of rigorous, effective work methods (review of Competency 2)
- Common legal terms and technical vocabulary specific to applications in the course of proceeding, requests for setting down and applications for enforcement: in French or English
- Sources of information specific to applications in the course of proceeding, requests for setting down and applications for enforcement: *Code of Civil Procedure*, websites of interest, reference handbooks adapted to legal secretarial work, legislation, etc. (review of Competency 2)
- Correction of errors (review of Competency 2)

- 1 Organize the work.
 - Various instructions: different types of applications and requests, different contexts, different parties, different districts, different levels of complexity, etc. (review of Competency 2)

- Different applications in the course of proceeding: to cease representing; substitution of a lawyer; disavowal; contestation of evidence; withdrawal or amendment of a pleading; intervention of a third party; recourse in warranty; joinder, severance, splitting or stay of a proceeding; termination of a proceeding; case management; to set or extend time limits, etc.
 - Various requests for setting down by reason of failure and for a trial date and judgment, fee statements, seizures and applications and notices of execution
 - Differences between failures: to answer a summons, to produce a defence, etc.
 - Periods: to answer a summons, to produce a defence, to appear, etc.
 - Calculation of periods (review of Competency 4)
 - Identification of tasks to be performed depending on the stage of the proceeding and the instructions
 - Setting of priorities when determining the order in which the tasks will be performed
 - Assessment of the time to be spent on the tasks to be performed
- 2 Prepare an application in the course of proceeding, a request for setting down and an application for execution.
- Various applications in the course of proceeding, various requests for setting down by reason of failure and requests for a trial date and judgment, fee statement, seizures and applications and notices of execution
 - Formatting rules for applications in the course of proceeding, requests for setting down and applications for execution (review of Competency 4)
 - Stages of the process in the course of proceeding (review of Competency 4)
 - Accuracy of the data (review of Competency 2)
 - Integrality of the application, request or document: presence of all the necessary content
 - Dates: calculation of periods (review of Competency 4)
- 3 Produce the documents and exhibits.
- Documents accompanying the application or request: sworn statements, notices of presentation, inventory of exhibits, etc.
 - Preparation and assembly of the original and certified copies of the pleadings, exhibits and documents (review of Competency 4)
- 4 Ensure that the work is of good quality.
- Correction of the draft application or request: changes required, consistency of the text and contextual facts, etc.
 - Content errors: choice of model, information concerning the parties or professionals, document title, legal terms, dates, etc.

5 Carry out the steps subsequent to the preparation of the application or request.

- Submission procedures for the application or request, documents and exhibits: people concerned, methods used, time limits, etc.
- Corrections requested by the professional, new instructions, etc.
- Signature of the application, request or documents
- Preparation and assembly of the original and certified copies of the application or request, exhibits and documents (review of Competency 4)
- Transmission of the documents required for a filing with the court clerk, notification or service: applicable rules, periods, legal fees, etc.
- Correspondence (review of Competency 2)
- Steps subsequent to preparation: next step in the procedure, entry of the next steps and time limits, follow-up required, consultation of the rolls (hearing schedule), etc.
- Filing of applications, requests, exhibits and documents
- Entry of follow-up notes where applicable, using the tool preferred by the workplace

Competency 7 Duration 15 hours Credits 1

Situational Competency

Statement of the Competency

Interact in a legal context.

Elements of the Competency

- Recognize the importance of communication in their work.
- Adopt professional attitudes and behaviours conducive to the exercise of the occupation.
- Become aware of their communication-related strengths and challenges.

Learning Context

Information Phase

- Learning about the general communication process
- Learning about professional attitudes and behaviours conducive to the exercise of the occupation in the context of their interactions
- Learning about the rules of conduct and professional ethics, protocol and internal operating rules governing interactions in the legal community
- Learning about simple problem-solving and stress management processes

Participation Phase

- Adopting suitable communication methods for interactions with members of the legal community
- Taking part in activities that allow for the adoption of professional attitudes and behaviours conducive to the exercise of the occupation
- Trying out simple problem-solving and stress management processes
- Trying out communication techniques and stress management methods in difficult situations within the legal context

Synthesis Phase

- Producing a self-evaluation that includes:
 - a report setting out their strengths and challenges with respect to interactions with members of the legal community
 - the steps to be taken to improve the way they interact in a legal context
- Presenting the results of their self-evaluation

Instructional Guidelines

- Ensure that relevant, up-to-date information is available on the topics to be addressed
- Encourage discussions in an open, respectful atmosphere
- Provide the support needed for the students to carry out the activities
- Design simulations that are representative of different legal workplaces
- Present tools that facilitate the observation and analysis of simulations

- Establish connections between the professional behaviour expected in the workplace and the rules of conduct and professional ethics
- Provide a self-evaluation structure

Participation Criteria

Information Phase

- Consult the sources of information made available to them
- Gather information on the topics to be covered

Participation Phase

- Take part in the activities and discussions
- Apply communication strategies adapted to the various legal community members with whom legal secretaries must interact
- Adopt professional attitudes and behaviours favourable to interactions during the exercise of the occupation

Synthesis Phase

- Produce a self-evaluation that includes:
 - a report setting out their strengths and challenges with respect to interactions within the legal community
 - the steps to be taken to improve the way they interact in a legal context
- Present the results of their self-evaluation

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each phase of the learning context, along with their attendant guidelines.

For the competency as a whole:

- Common legal terms and technical vocabulary
- The competency as it relates to the occupation: connections with the other competencies
- General principles of communication
- Rules of conduct and professional ethics
- Importance of adopting professional behaviour
- Importance of good quality French and English

Information Phase

- Basic communication elements and techniques: verbal and non-verbal communication, means of approach, active listening, the person's condition, the person's needs, etc.
- Level of language to be adopted for each individual interlocutor: use of plain language to convey legal information, clarity and effectiveness of the communication, etc.
- Limitations of the role and responsibilities of a legal secretary compared to the role and limitations of other people in the legal community (superiors, co-workers, clients, etc.)
- Professional behaviours towards superiors, co-workers, clients and legal community members: values specific to the legal community, expected attitudes and behaviours, etc.
- Professional image: internal and external consequences of the professional image projected in the workplace, in their use of social media, in their public comments, etc.

- Methods that can be used to adapt to individuals and situations: openness and flexibility, absence of prejudice, acceptance of difference, tolerance, etc.
 - Respect for the legal community and its authorities: respect for professionals and community members, respect for court decisions, respect for the legal system's authorities, etc.
 - Rules of conduct and professional ethics applicable to the work of a legal secretary: respect for justice and legal authorities, reserve, ethical judgment and the consequences of unprofessional behaviour (consequences for the image of the workplace, for performance at work, for work relationships, etc.), *Code of Conduct for Notaries*, *Code of Conduct for Lawyers*
 - Protocol and internal operating rules in a legal workplace: conservative environment, dress code, language, positions, hierarchies, etc.
 - Evaluation of priorities: priority management methods, level of urgency of different situations (types of requests or applications, time limits, dangers to health or life, accountability for decisions, etc.), etc.
 - Conflicts and difficult situations: complaints, aggressive and violent behaviours, interpersonal conflicts, management of emergencies, difficult personalities, etc.
 - Stress: stress factors and sources, manifestations and impacts of stress (physical reactions, psychological reactions, impacts on behaviour, etc.) and stress management (methods and techniques, consequences of poor stress management for them, for their relationships and for the workplace, etc.).
-

Participation Phase

- Discussions on the data gathered during the information phase and discussion about the impacts on interactions within the legal community: synchronous discussion (in-person meeting, telephone conference or videoconference), asynchronous presentation (audio or video recording) or written presentation (using contextualizations)
- Active, respectful participation
- Methods to foster effective communication in accordance with the rules of conduct and professional ethics in the legal community

Synthesis Phase

- Possible presentation methods: notes, summary, oral, audio or video presentation
- Self-evaluation of their strengths and challenges and the steps to be taken to interact effectively and professionally in a legal workplace

Competency 8

Duration 75 hours

Credits 5

Behavioural Competency

Statement of the Competency

Produce notarial practice files.

Achievement Context

- For:
 - family-related matters (marriage, civil union and cohabitation), wills, protection mandates, property transactions, estates, etc.
- Under the responsibility of a notary
- In collaboration with people inside and outside the notarial practice
- Based on contextualizations and various verbal or written instructions
- Using:
 - models
 - calculation tools
 - the necessary equipment, materials and technological tools
 - the applicable legislation and regulations, etc.

Elements of the Competency**Performance Criteria**

1 Organize the work.

- Accurate determination of the nature of the file to be processed
- File opened correctly
- Accurate determination of context
- Correct interpretation of instructions
- Careful choice of notarial deed
- Careful choice of the documents to be attached to or associated with the notarial deed

2 Prepare the draft notarial deed.

- Compliance with instructions
- Compliance with the formalities of the notarial deed
- Relevance of the information entered in the notarial deed
- Accuracy of the information entered in the notarial deed
- Accurate calculations in connection with the file
- Application of formatting rules
- Impeccable presentation of work

3 Ensure that the work is of good quality.

- Full revision of the notarial deed
- Exhaustive identification of content errors
- Accurate correction of errors

- 4 Complete the draft notarial deed for signature.
 - Rigorous submission of the draft notarial deed
 - Accurate correction or amendment of the draft notarial deed, as required
 - Correct entry of the date
 - Correct entry of the minute number
- 5 Organize appointments.
 - Compliance with instructions
 - Correct assignment of appointments
 - Compliance with time limits
 - Relevance of the information provided when confirming appointments
 - Professional greeting of clients and other people
- 6 Carry out the steps subsequent to the signature of the notarial deed.
 - Notarial deed *en minute* properly registered in the directory
 - Properly prepared index
 - Compliance of the true copies of the notarial deed *en minute*
 - Notarial deed *en minute* properly prepared for entry or publication
- 7 Prepare correspondence.
 - Sorting of documents to be sent and to be kept in the file
 - Preparation of appropriate correspondence
 - Accuracy of the information provided
 - Application of formatting rules
- 8 Close and archive the file.
 - Accurate identification of the next steps and time limits
 - Compliance with the rules governing file closure
 - Filing in the appropriate place

For the competency as a whole:

- Adoption of effective, rigorous work methods
- Accurate use of legal terms
- Effective use of different sources of information
- Quality of French or English
- Adoption of attitudes and behaviours conducive to professional interactions
- Compliance with the rules of conduct and professional ethics

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of rigorous, effective work methods (review of Competency 2)
- Legal terms specific to files in notarial practice: in French or in English
- Sources of information specific to files in notarial practice: websites of interest, reference handbooks adapted to legal secretarial work, legislation, registers (*Register of Personal and Real Rights* [RDPRM], *Land Register*, *Enterprise Register*, etc.), the *Inforoute notariale*, etc. (review of Competency 2)
- Tools used in notaries' offices: *Inforoute notariale*, law directory, notarial library, web platforms, office management software, etc.
- Correction of errors (review of Competency 2)
- Professional attitudes and behaviours conducive to interactions (review of Competency 7)
- Importance of confidentiality and discretion when exercising the occupation of legal secretary

1 Organize the work.

- Various instructions: different types of acts, different types of clients, different contexts, different levels of complexity, etc. (review of Competency 2)
- Notarial profession: roles and responsibilities of a notary, differences between the roles of a lawyer and a notary, areas of jurisdiction, exclusivity, etc.
- Notary's office: clerk, organization, etc.
- Information on different types of acts: deed under private signature, notarial deed, unilateral act, bilateral act, etc.
- Confidentiality of information
- Communication with outside professionals (real estate agents, financial institution employees, surveyors, tax specialists, lawyers, accountants, etc.) and clients (review of Competency 2)
- Opening of a file: types of files, service contracts, information and documents required

2 Prepare the draft notarial deed.

- Distinctive elements of different types of acts: notarial deed *en minute*, notarial deed *en brevet* and deeds under private signature
- Choice of a model relevant to the deed to be prepared
- Importance of the elements of the notarial deed: nature of the deed, date of the deed and other significant dates; appearances; complete and exact designation; civil status and matrimonial regimes; other essential information, depending on the deed; choice of relevant clauses
- Formalities of the notarial deed: date, amount, minute number, retention rules, etc.
- Importance of the integrality of the notarial deed: presence of all required content
- Content of different notarial deeds: marriage contract, civil union contract, will, protection mandate, property mortgage, sale, declaration of transmission, discharge, release, etc.

- Calculations: amounts owing by the seller or purchaser (distribution of taxes and other expenses, distribution of sale price, down payment, disbursements), transfer taxes owed by the purchaser (consideration, tax base, calculation rules, exemptions, suppletive law), taxes, liabilities, assets, etc.
 - Presentation of notarial deeds and documents: format, fonts, etc.
- 3 Ensure that the work is of good quality.
 - Correction of the draft deed: changes required, consistency of the text and contextual facts, etc.
 - Content errors: choice of model, information concerning the parties or professionals, document title, legal terms, dates, etc.
 - 4 Complete the draft notarial deed for signature.
 - Submission of the draft deeds and accompanying documents: to the professional, to the other professionals involved in the matter, to the client, etc.
 - Preparation of the draft deed or document: steps in the preparation of the draft deed
 - Corrections or amendments requested, as needed
 - Proper printing of the notarial deed
 - Accurate entry of the date and minute number in the notarial deed upon signature
 - 5 Organize appointments.
 - Planning of appointments with clients and other people (review Competencies 2 and 7)
 - Coordination of appointments: communications, information to be provided, entries in the agenda, compliance with time limits, special measures, etc.
 - Appointment tools: paper or electronic agenda, date selection tool, etc.
 - Greeting of clients and role to be played in verifying their identity
 - 6 Carry out the steps subsequent to the signature of the notarial deed *en minute*.
 - Preparation of true copies of the notarial deed *en minute* (on paper or a technology platform, or in electronic format): paper format (date, seal, copies of signatures, compulsory note, notary's original signature and reverse side)
 - Publication in the *Land Register*: procedures, fees, confirmation of return, entry in the deed and in the file, etc.
 - Entry in the *Register of Personal and Real Movable Rights*: requisitions to be completed, fees, confirmation of entry, entries in the deed and in the file, etc.
 - Will and mandate reports: frequency, information to be entered, return of entries, etc.
 - General notions of trust fund management
 - 7 Prepare correspondence.
 - Correspondence: documents to be sent depending on the party, documents to be sent to outside professionals, etc.
 - Formatting (review of Competency 2)
 - 8 Close and archive the file.
 - Steps subsequent to preparation: next step in the procedure, entry of next steps and time limits, follow-up required, etc.
 - Closing of the file: filing of documents, invoices, retention of documents, filing, etc.
 - Compliance with the rules

Competency 9 Duration 30 hours Credits 2

Behavioural Competency

Statement of the Competency

Prepare civil pleadings in contentious family matters.

Achievement Context

- For:
 - application for divorce and other contentious applications in first instance family matters concerning separation as to bed and board, child custody and support, provisional measures, safeguard orders, etc.
- Under the responsibility of a lawyer
- Based on:
 - contextualizations and various written and verbal instructions
 - a written or dictated text
- Using:
 - models
 - calculation tools
 - the necessary equipment, materials and technological tools
 - the applicable legislation and regulations, etc.

Elements of the Competency**Performance Criteria**

1 Organize the work.

- Correct interpretation of instructions
- Identification of relevant information
- Accurate identification of the work to be done
- Careful choice of the model pleading
- Accurate identification of the documents needed and the information to be obtained
- Effective communication with the people involved in the matter

2 Prepare the pleading.

- Compliance with the instructions, context and stage of the proceeding
- Accuracy of the data entered in the pleading
- Consistency of the elements of the pleading with the context
- Application of formatting rules
- Impeccable presentation of documents
- Accurate calculation of the support payment, where applicable

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|--|---|
| 3 Produce the documents and exhibits. | <ul style="list-style-type: none"> • Correct production of the documents and exhibits • Application of formatting rules • Consistency of the information entered in the documents, exhibits and pleading |
| 4 Ensure that the work is of good quality. | <ul style="list-style-type: none"> • Full revision of the pleading, documents and exhibits • Exhaustive identification of content errors • Accurate correction of errors |
| 5 Carry out the steps subsequent to the preparation of the pleading. | <ul style="list-style-type: none"> • Draft pleading, documents and exhibits submitted to the person or people concerned • Preparation of certified copies • Rigorous assembly of the pleading, documents, exhibits and reverse sides • Compliance with the procedures for the transmission of the required documents • Correct preparation of the correspondence • Accurate identification of the next steps and time limits • Proper filing of the pleading, documents and exhibits |

For the competency as a whole:

- Adoption of effective, rigorous work methods
- Accurate use of legal terms
- Effective use of different sources of information
- Quality of French or English
- Adoption of attitudes and behaviours conducive to professional interactions
- Compliance with the rules of conduct and professional ethics

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of rigorous, effective work methods (review of Competency 2)
- Legal terms specific to civil pleadings in contentious family matters: in French or English
- Sources of information specific to civil pleadings in contentious family matters: *Code of Civil Procedure*, websites of interest, reference handbooks adapted to legal secretarial work, legislation, etc. (review of Competency 2)
- Retrieval of relevant information and additional searches in sources of information, if necessary
- Correction of errors (review of Competency 2)
- Attitudes and behaviours conducive to interactions (review of Competency 7)
- Importance of confidentiality and discretion when exercising the occupation of legal secretary

1 Organize the work.

- Various instructions: different types of requests and applications, different types of unions, different contexts, different parties, different locations, different levels of complexity, etc. (review of Competency 2)
- Information on family matters: types of union, matrimonial regimes and civil unions, family residence, family patrimony, filiation, consequences of terminating a union, child custody, support payments, etc.
- Differences between the pleadings: application for divorce, originating application for custody and support, application for provisional measures, safeguard order, defence, etc. (review of Competency 4)
- Identification of tasks to be performed depending on the context, the stage of the proceeding and the instructions
- Setting of priorities when determining the order in which the tasks will be performed
- Assessment of the time to be spent on the tasks to be performed
- People involved in the matter: opposing party's lawyer, child's or children's lawyer, family mediator, health and social services worker, accountant, etc. (review Competencies 2 and 7)

2 Prepare the pleading.

- Steps in the family case procedure, depending on the type of application or request: application filing protocol, defence, hearing, etc. (review of Competency 4)
- Accuracy of the data (review of Competency 2)
- Text of the pleading
- Dates: calculation of time limits (review of Competency 4)
- Formatting rules for pleadings (review of Competency 4)
- Calculation of support: the parties' contact information, income, expenditures, types of custody, sworn statements, etc.

3 Produce the documents and exhibits.

- Documents to be attached to the pleading: lawyer's statement, clerk's certificate, summons, notice of presentation, sworn statements, etc.
- Exhibits and documents required: acts and certificates of marriage, acts and certificates of birth, tax documents, proof of attendance at the group information meeting on parenting after a breakup, true copy of the marriage contract, support calculation form, etc.
- Preparation and assembly of the original and certified copies of the applications, exhibits and documents (review of Competency 4)

4 Ensure that the work is of good quality.

- Correction of the draft pleading: changes required, consistency of the text and contextual facts, etc.

- 5 Carry out the steps subsequent to the preparation of the pleading.
- Submission procedures: people concerned, methods used, time limits, etc.
 - Corrections requested by the professional, new instructions, etc.
 - Signature of the application or documents
 - Preparation and assembly of the original and certified copies of the application, exhibits and documents (review of Competency 4)
 - Transmission of the documents required for a filing with the court clerk, notification or service: applicable rules, time limits, legal fees, etc.
 - Correspondence (review of Competency 2)
 - Steps subsequent to the step carried out: next step of the process, entry of next steps and dates in the file and agenda, follow-up required, etc.
 - Filing of applications, exhibits and documents
 - Entry of follow-up notes, where applicable, using the tool preferred by the workplace

Competency 10 Duration 30 hours Credits 2

Behavioural Competency

Statement of the Competency

Prepare non-contentious applications.

Achievement Context

- For:
 - non-contentious first instance applications according to the applicable rules, before the court or notary
- Under the responsibility of a professional
- Based on:
 - contextualizations and various written or verbal instructions
 - a written or dictated text
- Using:
 - models
 - calculation tools
 - the necessary equipment, materials and technological tools
 - the applicable legislation and regulations, etc.

Elements of the Competency

Performance Criteria

1 Organize the work.

- Correct interpretation of instructions
- Identification of relevant information
- Accurate identification of the work to be done
- Careful choice of a model
- Accurate identification of the necessary documents and the information to be obtained
- Effective communication with the people involved in the matter

2 Prepare the applications.

- Compliance with the instructions, the context and the stage of the proceeding
- Compliance with the rules governing applications filed with the court
- Compliance with the rules governing applications filed with a notary
- Accuracy of the data entered in the application and accompanying documents
- Consistency of the elements of the application with the accompanying documents
- Application of formatting rules
- Impeccable presentation

- | | |
|---|--|
| 3 Produce the documents and exhibits. | <ul style="list-style-type: none"> • Correct production of the documents and exhibits • Application of formatting rules • Conformity of the information entered on the documents and exhibits with the application |
| 4 Ensure that the work is of good quality. | <ul style="list-style-type: none"> • Full revision of the application, documents and exhibits • Exhaustive identification of content errors • Accurate correction of errors |
| 5 Carry out the steps subsequent to the preparation of the application. | <ul style="list-style-type: none"> • Draft application, documents and exhibits submitted to the person or people concerned • Preparation of certified copies • Rigorous assembly of the application, documents, exhibits and reverse sides • Compliance with the procedures for the transmission of the required documents • Correct preparation of the correspondence • Accurate identification of the next steps and time limits • Proper filing of the application, documents and exhibits |

For the competency as a whole:

- Adoption of effective, rigorous work methods
- Accurate use of legal terms
- Effective use of different sources of information
- Quality of French or English
- Compliance with the rules of conduct and professional ethics

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each element of the competency, along with their attendant guidelines.

For the competency as a whole:

- Strategies allowing for the adoption of rigorous, effective work methods (review of Competency 2)
- Legal terms specific to non-contentious proceedings: in French and English
- Sources of information specific to non-contentious proceedings: *Code of Civil Procedure*, websites of interest, reference handbooks adapted to legal secretarial work, legislation, etc. (review of Competency 2)
- Retrieval of relevant information and additional searches in information sources, if necessary
- Correction of errors (review of Competency 2)
- Importance of confidentiality and discretion when exercising the occupation of legal secretary

1 Organize the work.

- Various instructions: different applications, different contexts, different parties, different districts, different levels of complexity, etc. (review of Competency 2)
- Recognition of non-contentious applications: changes to the register of civil status, tutorship to the absentee, tutorship to a minor, tutorship to a person of full age, homologation of a protection mandate, verification of wills, joint application based on a draft agreement, domestic adoption, etc.
- Identification of the parties: contact information and quality (applicant, person concerned, interested person, etc.)
- Identification of tasks to be performed depending on the stage of the proceeding and the instructions
- Setting of priorities when determining the order in which the tasks will be performed
- Assessment of the time to be spent on the tasks to be performed
- Communications and interactions with clients and the people involved in the matter: health and social services worker, family member or friend of the person concerned, other lawyer, other notary, etc. (review Competencies 2 and 7)

2 Prepare the applications.

- Steps for a non-contentious case presented to the court: originating application; examination by the clerk; meeting of parents, relatives or friends chaired by the clerk; presentation of the application, etc. (review of Competency 4)
- Steps for a non-contentious case presented to a notary: application and notice of application; operations; meeting of parents, relatives or friends chaired by the notary; minutes of notarial operations and conclusions, etc.
- Quality of the parties: applicant, person concerned, interested person, parent, relative, friend, heir, successor, adopter, etc.
- Information in the application: header, quality of the parties, contact information for the parties, title, content, lawyer, notary, dates, signature block elements, etc. (review of Competency 4)
- Documents to be attached to the application: sworn statements, notice of presentation, application to the notary, etc.
- Dates: calculation of time limits (review of Competency 4)
- Formatting rules for applications and accompanying documents (review of Competency 4)

3 Produce the documents and exhibits.

- Documents to be attached to the application: notarial deed, lawyer's statement, clerk's certificate, summons, notice of presentation, sworn statements, etc.
- Presentation and assembly of the original and certified copies of the application, exhibits and documents (review of Competency 4)

4 Ensure that the work is of good quality.

- Correction of the draft application: changes required, consistency of the text and contextual facts, etc.
- Content errors: choice of model, information about the parties or professionals, document title, legal terms, dates, etc.

- 5 Carry out the steps subsequent to the preparation of the application.
- Submission procedures: people concerned, method used, time limits, etc.
 - Corrections requested by the professional, new instructions, etc.
 - Signature of the application or documents
 - Preparation and assembly of the original and certified copies (review of Competency 4)
 - Transmission of the documents required for a filing with the court clerk, notification or service: applicable rules, time limits, legal fees, etc.
 - Correspondence (review of Competency 2)
 - Steps subsequent to preparation: next step in the procedure, entry of next steps and deadlines, follow-up required, etc.
 - Filing of applications, exhibits and documents
 - Entry of follow-up notes where applicable, using the tool preferred by the workplace

Competency 11 Duration 105 hours Credits 7

Situational Competency

Statement of the Competency

Enter the workforce.

Elements of the Competency

- Apply the competencies acquired during training.
- Consolidate attitudes compatible with the occupation.
- Take stock of their learning.

Learning Context

Information Phase

- Becoming familiar with the methods, information and documents relating to the practicum
- Producing or updating their resumé
- Searching for a practicum
- Learning about the rules and practices in force at the practicum workplace, and the tasks to be performed

Participation Phase

- Observing different practices applied in the occupation
- Integrating into the team
- Carrying out various occupational tasks
- Keeping a daily journal

Synthesis Phase

- Producing a report of the practicum experience that contains:
 - A description of the tasks performed, the specific features of the practicum workplace, and connections with the training received
 - A self-evaluation (strong points and points to be improved, potential ways of continuing to develop competencies)
 - A description of the specific features of the practicum workplace, especially the elements that differentiate it from the training received

Instructional Guidelines

- Provide the students with the means and assistance needed to search for a practicum.
- Make sure the practicum workplace provides conditions that will allow the students to achieve the aims of the practicum.
- Provide the supervision needed for the practicum to proceed smoothly.
- Provide the students with practicum guidance documents.
- Prepare the students to take responsibility and respect the requirements of the practicum workplace.

- Provide periodic supervision for the trainee during the practicum.
- Help to solve problems that occur during the practicum.
- Plan an individual interview to talk about the self-evaluation.

Participation Criteria

Information Phase

- Become familiar with the terms and conditions of the practicum and the related information and documents.
- Produce or update their resumé.
- Take steps to obtain a practicum.
- Gather information on the chosen practicum workplace.

Participation Phase

- Comply with workplace instructions concerning activities, work schedules, occupational health and safety rules, and rules of conduct and professional ethics.
- Carry out the professional activities assigned during the practicum.
- Write down the requested observations and information in the daily journal.

Synthesis Phase

- Produce a report that contains:
 - a statement of their perceptions of the occupation before and after the practicum
 - a comparison of the training received and the practicum workplace
 - a self-evaluation (strong points and points to be improved, potential ways of continuing to develop competencies)
 - an evaluation of the practicum workplace
- Express an opinion about their practicum experience.

Suggestions for Competency-Related Knowledge and Know-How

The following is a summary of the knowledge, skills, strategies, attitudes and perceptions related to each phase of the learning context, along with their attendant guidelines.

Information Phase

- Terms, conditions and information about the practicum: objectives and duration, supervision conditions, requirements, participation criteria, etc.
- Search for a practicum workplace: inventory of practicum workplaces, model resumés, preparation of a letter of application for a practicum, contact with the person responsible in the practicum workplace, etc.
- Practicum agreement: clarification of the terms and conditions, acceptance of the agreement by the parties, etc.

Participation Phase

- Observation: work context or environment, tasks, professional responsibilities or activities carried out by legal secretaries, etc.
- Interaction: attitudes and behaviours conducive to workplace integration, the trainee's attitude and know-how, etc.
- Integration into the team: observation and application of methods, interactions with staff members, etc.

- When performing tasks: importance of following current procedures and complying with the legal and regulatory framework, the rules of conduct and ethics, the hierarchical rules and occupational health and safety rules
- Daily journal: typical content, report of activities carried out, performed and observed, new learning, etc.

Synthesis Phase

- Report format: written document, oral, audio or video presentation, individual or group meeting, etc.
- Practicum report: statement of own perception of the occupation before and after the practicum, comparison between the training received and the practicum workplace, self-evaluation (strong points and points to be improved, potential ways of continuing to develop competencies), evaluation of the practicum workplace
- Use of legal terms specific to the workplace's field of expertise
- Quality of French or English
- Importance of being objective in the report

