

Logbook Sheet	
1. Skills Element:	Learning Outcome:
Element 6: Managing Conveyancing Work	FILE HANDLING An ability to plan and manage a conveyancing transaction effectively
2. Evidence provided	
Calendar extract File review form Email dated 31 October 2023 Email dated 21 November 2023	
3. How does this meet the outcome?	
<p>In order to actively manage the cases that I am responsible for I utilise my 'live matter list' that is available through the case management software of my firm. I regularly print an annotate an up to date list and highlight those matters that are active and those that have completed. I then prioritise the active cases that require more immediate attention (for example if I have received correspondence on that file or if exchange or completion is imminent) and any cases that have completed where a deadline is approaching (for example if an SDLT deadline is due or a Land Registry priority search is about to expire. By using a list of all of my files I can ensure that no transaction is forgotten about and jobs are dealt with on a priority basis.</p> <p>I also use my calendar in Microsoft Outlook to set reminders of deadlines (e.g. the 14 day deadline to submit an SDLT in England), completion dates, priority search expiry dates, Land Registry cancellation dates for requisitions or required actions (such as chasing clients or other parties) to ensure tasks don't get missed. I have attached an extract of my Outlook calendar as evidence. I have also attached evidence of emails that I have sent chasing for progress in order that transactions progress in a timely manner.</p> <p>The above demonstrates that I am able to plan my workload and manage a number of tasks simultaneously and allocate appropriate time to each task. I prioritise the most important tasks to be done as soon as possible in the day and those tasks that are less time sensitive are dealt with later. I can instantly review my list to decide what capacity I have at that point and whether I need to delegate tasks to someone else so that the services I provide are of the best quality possible. The way in which I work and manage my caseload means that I can be realistic as to timescales for completing existing and new work.</p> <p>My firm carries out file reviews at regular intervals throughout the year to ensure files are maintained in accordance with the firm's policies and procedures. I have attached a file review form which shows that I have maintained my file properly and in compliance with the appropriate policies and procedures. The file review form contains checks on financial information, general compliance and general considerations. The evidence shows that I have satisfied all of the relevant criteria and that I have kept my file up to date.</p>	
4. Opportunities for further development (if any):	
It is important to allocate time and resources properly and know when I am at capacity so that I do not take on new work that will mean my level of service suffers as a result. I keep up to date by watching webinars and reading relevant guidance notes so that I am aware of all legal and procedural requirements.	
5. Completion Date:	
6. Signed (applicant):	
Date:	

Logbook Sheet	
1. Skills Element:	Learning Outcome:
Element 6: Managing Conveyancing Work	DEALING WITH OTHER PROFESSIONALS An ability to deal with and instruct other professionals
2. Evidence provided	
Report on title dated 22 June 2021 extract. Various emails dated May 2023	
3. How does this meet the outcome?	
<p>I am able to communicate and deal professionally with other professionals and third parties orally and in writing. I have attached evidence which provides examples of this.</p> <p>I have attached an extract from a report on title where I have advised a client who was purchasing a property that they should appoint a surveyor to inspect the property so that could ensure that they were aware of any defects before exchange of contract.</p> <p>I have also attached several emails to an insurance underwriter requesting their assistance in obtaining indemnity insurance for some title defects that I identified when reviewing a title. The insurance underwriter emailed their requirements and I obtained the information needed and replied accordingly. I advised my client of the costs of the insurance and made sure that my client was happy to proceed. The insurance was put in place on completion. This couldn't have happened without me identifying that an expert's input was required, liaising with the expert and achieving the desired outcome for my client.</p> <p>As further evidence I have attached a number of emails where I was acting for a bank and needed to send my report on title to the valuer/ surveyor and raise some queries with them regarding insurance. I instructed the valuer/ surveyor to deal with the queries I needed answers to and corresponded with them to obtain the required outcome.</p>	
4. Opportunities for further development (if any):	
It is important to establish and maintain a good working relationship with other professionals and third parties. By doing so it helps to progress matters effectively and efficiently and achieves the best outcome for a client. I feel comfortable knowing where I require input from a suitably qualified expert and giving instructions for them to assist me in a transaction.	
5. Completion Date:	
6. Signed (applicant):	
Date:	