WBL Logbook Sheet Template

Learning Outcome and example number e.g. 1.1(1), 1.2(2), 1.2(1) 1.2(2) etc.	Page numbers from portfolio
4.3: Maintain files and records in accordance with procedures	119-122

Evidence provided and date of evidence
e.g. Letter to client dated 01.01.2020
      Telephone attendance note dated 01.01.2020

File review from my manager dated 07.03.2022

Explain how the example –meets the learning Outcome and how the evidence shows this

I work as part of a local authority's (referred to as the Council) in-house legal team.

Lexcel:
At the Councils legal service department, we have Lexcel accreditation and maintain our files in accordance with Lexcel case management standards.

Lexcel defines quality management procedures in seven areas. These are: structure and strategy, financial management, information management, people management, risk management, client care, and file and case management.

I consider these factors in every case that I deal with.

VisualFiles:
At the Council we use a case management system called VisualFiles. Most of our matters are paperless and every dealing in the case is recorded on these electronic files. When opening a new file I create a "file information sheet" for each matter. This sheet incudes information such as a case summary, important contacts and key developments so that if any other fee earner needs to pick up the file they can view this sheet to get important details of the case.

I regularly and consistently review this sheet and make sure to record all developments that happen in the case.

File Reviews:
In line with our procedures, my files are reviewed regularly to ensure that I am keeping and maintaining them to the set standards. I have evidenced this with a file review from my manager that demonstrates that I have kept my file to these standards (no corrective actions were identified).
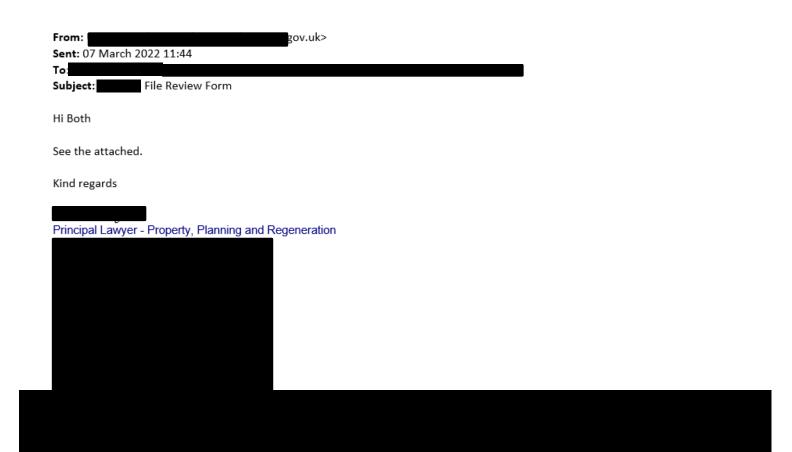
Reflection and evaluation
Describe what you learnt from the activity you undertook to meet the Learning Outcome. You may want to complete this section at a later date once you have had time to reflect on your practice and experience.

I recognise and understand that it is important to regularly review my files and maintain them to a high standard. By doing this I will give clients confidence in my work and maintain a good reputation for my team.

Supervisor's Name	
Please print the full name of the supervisor that supervised the work referred to above within this logbook sheet and the supporting evidence.	████████████

From: ████████████████████████gov.uk>
Sent: 07 March 2022 11:44
To: ████████████████████████████████
Subject: ██████ File Review Form

Hi Both

See the attached.

Kind regards

████████████
Principal Lawyer - Property, Planning and Regeneration

Legal Services - File Review Form - █████████████		
Review conducted by: ████████	**Fee Earner:** ████████	
Date of review: 7 March 2022	**Number/name of file reviewed/worktype:** (remember! copy this form to case file to show that review has taken place) ████████████████████████████████ – EK - Buy Back **Acquisition**	
Points which may be considered at review		**Yes / No**
1	Has the risk been assessed on this file?	yes
	If the risk has been assessed as High, has the form CLS 3.1 been completed?	
2*	Are full and clear instructions on file in the required format?	yes
3*	Have instructions been acknowledged properly and cost information provided?	yes
4	Regular information given to clients on the progress of matter, or lack of progress, with reasons and cost and time estimates?	yes
5	File checklist/s up to date and clear - is it easy to establish essential details and the status of this matter?	yes
6	File correctly labelled and maintained in an orderly manner?	yes
7	Have any/all key dates been noted and acted upon accordingly?	yes
8	Adequate and clear attendance notes on file and in correct format?	yes
9*	Has correspondence been answered promptly?	yes
10	Professional and appropriate conduct of matter?	yes
11	Are there any training needs specific to this matter?	no
12	Are there any lessons being learnt or that could be learnt from this case? Details	none
Other issues	Observation & comments	

Corrective action/s (if any) To be completed within 28 days (or earlier if specified)	Due Date	Date corrective action taken	Initial of supervisor
Signed fee earner:		Signed supervisor: ████████	
Remember to set date for next file review meeting and make diary entry.			