

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
6.2(1): Provide appropriate information to clients and service users	138-140
Evidence provided and date of evidence e.g. Letter to client dated 01.01.2020 Telephone attendance note dated 01.01.2020	
File opening email to the client dated 18.06.2021	
Explain how the example meets the learning Outcome and how the evidence shows this	
<p>Demonstrate understanding of the information which must be supplied to clients to comply with professional conduct rules</p> <p>Principal 5.7 of the CILEx Code says that you must “adequately explain and agree with your client the terms upon which your services are to be provided, including the extent of the services, payment and the likely or anticipated cost, outcome and timescale for the advice and services to be provided”.</p> <p>Principal 8.7 of the SRA Code of Conduct states that you must “ensure that clients receive the best possible information about how their matter will be priced and, both at the time of engagement and when appropriate as their matter progresses, about the likely overall cost of the matter and any costs incurred”.</p> <p>I therefore understand that it is important to inform the client from the beginning about the costs involved with the matters and estimates on how long I expect it to take to complete. I also understand that if during the course of the matter the work takes longer than expected or becomes costlier, I must inform the client as soon as possible providing any new estimates.</p> <p>Provide evidence which demonstrates application of these obligations through the supply of details about client care and complaints handling information to clients</p> <p>The email that I sent to the clients on file opening demonstrates that I apply the obligations above. The email and letter include:</p> <ul style="list-style-type: none"> • Estimated costs of the case • Estimated timeframe for completion of the matter • Who is handling the case • The details of my manager • The Legal services vision and customer promise • Details of how to make a complaint 	

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 understand the importance of providing all the information to the client regarding how the case will be managed including giving estimates of costs and timeframes so that the client can manage their expectations as to how the matter will progress.

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: [REDACTED]
Sent: 18 June 2021 15:50
To: [REDACTED]
Cc: [REDACTED]
Subject: File opened: [REDACTED] Licence to Assign / [REDACTED]

Dear [REDACTED],

I write to confirm that your written instructions dated 18/06/2021 were received on 17/06/2021.

The matter has been allocated to me with the following details:

Matter title: [REDACTED]
Description: Licence to Assign
Our reference: [REDACTED]

Please quote the above reference number on all future correspondence.

Estimated time cost: £950.00

Estimated disbursement cost: £20.00

Given the subject matter and level of complexity of this case it is estimated that it will take approximately 6 weeks to conclude.

I have provided you with an estimate of the fees that you are likely to incur in respect of the matter and if necessary I will update that estimate as the matter progresses. Please note that the estimated cost and time is provided on the basis that this matter proceeds smoothly and there are no unforeseen delays. I will inform you of any difficulties or complexities which may arise with your case and which may require additional work and accordingly an additional charge.

The hourly charge rate for me is £[REDACTED] from time to time it may be necessary for a more junior or senior fee earner to carry out work on this case. In those instances the hourly rate of that fee earner will apply. Payments to third parties (disbursements) will be processed and paid by Legal Services, but will be recharged to your service. We will endeavour to agree disbursements in advance with you when appropriate.

Should you wish to discuss any aspects of this case, do feel free to contact me in the first instance. Failing that, you can discuss the matter with my supervisor [REDACTED]. For more information on our client care standards, please see our [Client Care Charter](#) on the council's intranet, alternatively contact me and I can send you a copy.

Kind regards,

[REDACTED]