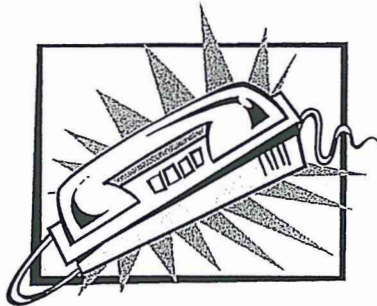


Name: [REDACTED]

Membership No: [REDACTED]

Competency: 2 Seek appropriate information through communication	Learning Outcome: 2.4
Evidence provided: Telephone attendance note (page 2.037) Email to client (pages 2.038 – 2.039)	
Outline how the evidence demonstrates you meet the outcome Identify additional information required: Answers to questions from client in order that I could draft a Staff Handbook for the Company. Communicate the request for information: My client contacted me to draft a Staff Handbook for his Company. On the call I explained that I would need him to answer some questions in order that I can draft the Staff Handbook and that I would send these questions over by email. Apply relevant law and procedure: I informed the client that once I had received the answers to the questions I had asked, I would be able to draft the Staff Handbook and get this over to him to review. When it was agreed, we would be able to implement it and inform the employees of it's existence. Provide supporting documentation as evidence of your communication: The telephone attendance note and email I sent to my client have been provided as evidence.	
Reflection and evaluation (what you learnt from the activity you undertook to meet the outcome). Note: you may want to complete this section at a later date once you have had time to reflect on your practice and experience. It is important to have good communication skills and to obtain as much information as possible when commencing a draft for a client.	
Completion date:	24 October 2014
Signed (applicant) [REDACTED]	Date: 7 November 2014
Signed (supervisor) [REDACTED]	Date: 7/11/2014.



Telephone Attendance

Client Reference: [REDACTED]
Client: [REDACTED]
Matter Description: Handbook
Time Units: 4
Person Spoken to: [REDACTED]
Date of Call: 24th October 2014
Fee Earner: [REDACTED]

Conversation Summary:

[REDACTED] receiving a call from [REDACTED] discussing business and where [REDACTED] is based now he has moved from [REDACTED] House. [REDACTED] confirming that he was calling as he has taken on some new staff and thinks he should have a handbook in place just in case something should happen in the future. [REDACTED] stating this is a good idea. [REDACTED] asking how many employees he has now and [REDACTED] confirming he has just taken on his sixth.

[REDACTED] explaining that she can draft [REDACTED] a basic staff handbook setting out the core policies and procedures so that he is compliant and as it is a non-contractual document he can always add to and amend these where required. [REDACTED] confirming that this sounds great.

[REDACTED] stating that she will send [REDACTED] a list of questions to answer so that she can thoroughly draft the handbook without asking [REDACTED] questions every 2 minutes and [REDACTED] appreciating this. [REDACTED] confirming they could do this over the phone but often people prefer to have them in front of them to go through and [REDACTED] agreeing that he would prefer this.

[REDACTED] will send the questions to [REDACTED] when they get off the phone and once responses are received [REDACTED] will draft the Handbook and get this to [REDACTED] within a day or two. [REDACTED] can then implement the handbook and [REDACTED] will provide [REDACTED] with some wording to send to the employees to announce the creation of the handbook.

[REDACTED] thanking [REDACTED] to send [REDACTED] questions for further info required.

m: [REDACTED]
it: 24 October 2014 16:00
: [REDACTED]
subject: Handbook Questions! [REDACTED]

Follow Up Flag: Follow up
Flag Status: Flagged

Hi [REDACTED]

Further to our conversation, please find below questions re the handbook:

- Who is the first port of call for any issues, a line manager or a supervisor?
- Who are matters escalated to after the first port of call?
- Who handles any appeals? (usually the MD)
- Do you have an IT dept? If not, who deals with any IT related issues?
- Do you have an HR dept? If not, who handles general HR matters?
- Do you permit the use of internet searches for recruitment purposes?
- Do you require staff to check their emails at least once every working day?
- Do you allow the use of social media etc during work hours? Just on lunch breaks? Or not at all?
- Do you allow employees to add clients/customers to their personal social media accounts?
- Do you operate compulsory drug testing?
- How many days' sick leave do you allow employees before you would instigate a sickness absence meeting with them?
- Do you have Company sick/maternity pay? Or just SSP?
- Do you make contributions to political parties?
- Do you make charitable donations?
- Do you allow staff to accept gifts from clients? If so, what value would be the maximum before a manager should be informed? £20?
- Do employees have ID badges that they are required to wear?
- Do employees have uniforms that they are required to wear?
- Who do expenses forms get submitted to? Accounts dept?
- Expenses should be submitted within how many days?
- Where is the accident book kept?
- Name, contact no and email address for the:
 1. appointed whistleblowing officer;
 2. chairman of the board;
 3. health and safety officer; and
 4. data protection compliance manager.
- Do you want compassionate/bereavement leave to be paid or unpaid? If paid, for how many days per year?
3?
- Do you pay for jury service? If so, up to how many days? 10 working days?
- Do you pay for time off for dependants leave? Or is it unpaid leave?
- Do you want a homeworking policy? This policy is not necessary if you do not allow/require people to work from home.
- Do you want a career break policy? This policy is not necessary if you do not allow career breaks.
- Have you reached your auto-enrollment staging date and now pay into a pension for all eligible employees? Or do you just give them the option to pay in to a scheme?

I will get the paperwork sent over to you asap and once I receive your answers I will start drafting the Handbook. Can you please send me your current contracts so that I can ensure I am not changing any terms?

Thanks,

[REDACTED]
Legal Assistant

[REDACTED]

[REDACTED]

[REDACTED]

This message is private and confidential. If you have received this message in error, please notify us and remove it from your system. [REDACTED] Limited Liability Partnership registered in England & Wales under registered no. [REDACTED] Registered office [REDACTED] A list of members is available at this address. Any reference to a Partner in relation to [REDACTED] means a member of [REDACTED] All Partners are solicitors registered in England and Wales. Service by fax and email is not accepted. Authorised and regulated by the Solicitors Regulation Authority No [REDACTED] www.sra.org.uk/solicitors/code-of-conduct Authorised and Regulated by the Financial Services Authority.