

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(2)	238
Evidence provided and date of evidence e.g. Letter to client dated 01.01.2020 Telephone attendance note dated 01.01.2020	
Email to client dated 30 September 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 / service users to comply with professional conduct rules: The CILEx Code of Conduct sets out the information which must be supplied to clients / service users.</p> <p>Outcome 5.7 of the CILEx Code of Conduct states that I must adequately explain and agree with my client the terms upon which my services are to be provided, including the extent of the services, payment and the likely or anticipated costs, outcome and timescale for the advice and services to be provided.</p> <p>I work for a firm of solicitors and I am also therefore regulated by the Solicitors Regulation Authority (SRA). The SRA's Code of Conduct sets out the information which must be supplied to clients / service users.</p> <p>Principle 8.7 of the SRA's Code of Conduct states that I 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>Provide evidence which demonstrates application of these obligations through the supply of details about client care and complaints handling information to clients / service users.</p> <p>The email I have included provides an example of the way in which I explain to clients how my services will be provided and keep them updated as to the likely overall costs of the matter and any costs incurred.</p> <p>As the enclosed email evidences, when a matter progresses in such a manner that previous budgets are reached I provide a detailed breakdown of the most recent update and the steps left to action with an estimate of the fees which will be incurred for each step. I then calculate and confirm to my clients the likely overall cost of the matter once those steps have been taken.</p>	

Due to the high volume of matters we receive from this particular client, the supply of details about client care and complaints handling for the basis upon which I provide litigation services to this client is governed by a global engagement letter, protocol statement for external counsel and my firm's terms of business. These are sent to the client on a global basis by the client partner and it is agreed with this client that we do not need to provide this information for each individual instruction that we receive.

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 complying with the rules and regulations which govern me. I ensure that my clients are provided with as much information as possible as to how their matters are progressing by providing detailed breakdowns of the work undertaken / to be undertaken and an estimate of fees for each step. This ensures that my clients understand the likely overall costs of each matter.

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.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Hi both

Action

Please review the below budget increase request.

Update

I am pleased to confirm that not only has the Claimant's appeal been dismissed, but the Court has made an extended civil restraint order restraining the Claimant from issuing claims or making applications until 17 September 2023.

A further order for the Claimant to attend Court for questioning has been listed for 10 November 2021.

The ECRO should mean that the Claimant cannot apply to adjourn this appointment and we hope that this means she will actually attend this time.

Budget

The current budget is £21,281.76 ex VAT which we have now exceeded.

We have approximately £300 of WIP on the matter in relation to analysis and review of the Claimant's appeal and providing advice to you. .

[REDACTED] (375936.02255)			
Steps	WBD Fees	LPC fees	Other Disb
WIP on file	£300.00		
Preparation for N39 Hearing and dealing with any queries that the advocate may raise	£300.00		
Dealing with all future correspondence	£200.00		
Other Hearing preparation including dealing with any last minute communications from the Claimant	£300.00		
N39 Hearing		£135.00	
Subtotal (ex VAT)	£1,100.00	£135.00	
VAT			
Total (inc VAT)	£1,320.00	£162.00	
TOTAL INCREASED BUDGET PROPOSED (all fees and disbursements net of VAT)			£1,23

If agreed this will bring the total budget to £22,516.79

I would be grateful to receive your instructions.

Kind regards