

Name: [redacted] Membership no: [redacted]

1. Competency: 4 Learning Outcome: 4.2

Plan workload to give good legal service.

2. Evidence provided:

Task List.

3. Outline how the evidence demonstrates you meet the outcome

Demonstrate planning and progression of workload: I have demonstrated this task through production of my work list. This shows the cases allocated to me and the due dates for key tasks.

Evidence planning workload and running a number of tasks concurrently: The evidence provided shows the number of tasks relation to files which have been allocated to me allows me to prioritise matters and progress my cases.

Demonstrate exercising judgement about the legal services that can be provided: I ensure that the key dates are adhered to and that the appropriate action is taken prior to the task falling due – e.g. a defence is drafted and if necessary sent out to the Defendant for signature well before the date when it is due to be filed at court.

4. 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.

I understand the importance of maintaining an accurate case management system as I deal with a large number of cases at the same time and if inaccurate records are maintained, this could result in the key dates being missed which would have adverse consequences for my client.

5. Completion date: Ongoing – screenshot from 25.06.2013

6. Signed (applicant)

[redacted signature]

Date: 10/10/13

7. Signed (supervisor)

[redacted signature]

Date: 25/9/13

Water Description

*Task Description

Due

Insd: S [REDACTED] TP: Mr. W [REDACTED] R [REDACTED]	Advocacy at trial	20/06/2013
Insd: Mr. F [REDACTED] TP: Mrs. B [REDACTED] G [REDACTED]	Notify attendees of trial date	20/06/2013
Insd: S [REDACTED] TP: Mr. J [REDACTED] A [REDACTED]	Reminder: Lay witness evidence to be exchanged on	21/06/2013
Insd: S [REDACTED] TP: Mr. J [REDACTED] A [REDACTED]	Have you received TP's lay witness evidence?	21/06/2013
Insd: V [REDACTED] TP: A [REDACTED] A [REDACTED]	Reminder: Lay witness evidence to be exchanged on	21/06/2013
Insd: D [REDACTED] TP: A [REDACTED] L [REDACTED]	Have you received TP's lay witness evidence?	21/06/2013
Insd: G [REDACTED] TP: A [REDACTED] A [REDACTED]	Instruct costs negotiators	21/06/2013
Insd: F [REDACTED] TP: A [REDACTED] A [REDACTED]	Instruct costs negotiators	21/06/2013
Insd: Mr. S [REDACTED] TP: Mr. W [REDACTED] A [REDACTED] J [REDACTED]	CRU Certificate received?	21/06/2013
Insd: Mr. S [REDACTED] TP: Mr. W [REDACTED] A [REDACTED] J [REDACTED]	Infant settlement - notice of hearing received	21/06/2013
Insd: Mr. G [REDACTED] TP: Mr. W [REDACTED] R [REDACTED]	Deal with Costs	21/06/2013
INSD: Mr. B [REDACTED] TP: Mrs. S [REDACTED] K [REDACTED]	Reminder: Part 36 offer expires today	22/06/2013
Insd: Mr. P. G. T [REDACTED] TP: Ms. V [REDACTED] D [REDACTED]	Have you received an allocation questionnaire from the	24/06/2013
Insd: D [REDACTED] TP: D [REDACTED] R [REDACTED]	Allocation: Questionnaire received from TP Sols?	24/06/2013
Insd: R [REDACTED] TP: F [REDACTED] B [REDACTED]	Post-lit Review	24/06/2013
Insd: R [REDACTED] TP: F [REDACTED] B [REDACTED]	Create and serve Notice of Acting	25/06/2013
Insd: Mr. M [REDACTED] TP: Mr. J [REDACTED] R [REDACTED] F [REDACTED]	Fraud Searches	25/06/2013
Insd: K [REDACTED] TP: J [REDACTED] C [REDACTED]	Draft Notice of Funding	25/06/2013
Insd: D. B. E [REDACTED] TP: J [REDACTED] H [REDACTED]	Telephone call to Insured RE: Liability	25/06/2013
Insd: F [REDACTED] TP: Mr. W [REDACTED] K. P. [REDACTED]	Have you received the inspection documents?	25/06/2013
INSD: Mr. E [REDACTED] TP: Mr. S [REDACTED] A [REDACTED]	Full file received from client?	26/06/2013
Insd: Mr. M [REDACTED] TP: Mr. J [REDACTED] R [REDACTED] F [REDACTED]	CRU Certificate received?	26/06/2013
Insd: Mr. M [REDACTED] TP: Mr. J [REDACTED] R [REDACTED] F [REDACTED]	CRU Registration	26/06/2013
Insd: Mr. F [REDACTED] TP: Miss L [REDACTED] B [REDACTED]	Fraud Searches	26/06/2013
Insd: Mr. G [REDACTED] TP: Mr. K [REDACTED] F [REDACTED]	Authority to settle received?	26/06/2013
Insd: Mr. M [REDACTED] TP: Mr. J [REDACTED] R [REDACTED] F [REDACTED]	List of documents	27/06/2013
Insd: V [REDACTED] TP: A [REDACTED] A [REDACTED]	Reminder: Disclosure must be made by 03/07/2013	27/06/2013
Insd: Mr. M [REDACTED] TP: Mr. J [REDACTED] R [REDACTED] F [REDACTED]	Reminder: Claim Strategy due on 30/06/2013	28/06/2013
Insd: Mr. M [REDACTED] TP: Mr. J [REDACTED] R [REDACTED] F [REDACTED]	File serve (fitness statements)	28/06/2013
Insd: S [REDACTED] TP: Mr. J [REDACTED] R [REDACTED] F [REDACTED]	Reminder: Raise Part 35.6 Questions of medical expert	28/06/2013
Insd: V [REDACTED] TP: A [REDACTED] A [REDACTED]	File serve (witness statements)	28/06/2013
	Have you received TP's updated Schedule of Losses?	28/06/2013