

Name: [redacted] Membership no: [redacted]

1. Competency: 5 Learning Outcome: 5.1

Demonstrate an understanding of the business environment of a legal practice/organisation.

2. Evidence provided:

Amended form of authority and e-mails.

3. Outline how the evidence demonstrates you meet the outcome

Identify the business environment in which you work: I work for the insurance litigation department in a firm of solicitors. I deal with litigated claims under delegated authority.

Identify and explain the aims and objectives of the company: Delegated authority files are billed under a fixed fee arrangement. From 1st July 2012, delegated authority schemes were no longer exempt from VAT. It was therefore important to know if a defendant was VAT registered or not.

How I achieve this: As a form of authority is sent to the Defendant on nearly every case, I suggested that the form of authority should be modified to include a box for the Defendant to confirm their VAT status. This was adopted by the firm. This saves time and work and separate inquiries do not have to be made when it comes to billing a file.

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 need to ensure that files are billed appropriately and that separate VAT invoices are sent when required. I also understand the need to obtain information on a Defendant's VAT status without unnecessary duplication of effort so as to minimise the cost to my firm.

5. Completion date: 30.07.12

6. Signed (applicant)

[redacted signature]

Date:

10/10/13

7. Signed (supervisor)

[redacted signature]

Date:

28/9/13

Form of Authority to Admit Liability

Claimant: Mrs S [redacted]
Defendant: Miss K [redacted]
Incident date: [redacted]
Our reference: [redacted]

I, Miss K A [redacted] of [redacted]

HEREBY authorise [redacted] Solicitors, [redacted] and N M [redacted] of [redacted], to make an admission of liability in these proceedings which arise out of an accident which occurred on or around [redacted] 2012 or in any negotiations for settlement in such proceedings.

I understand that this admission will prevent me from making a claim arising out of the incident.

I confirm that this admission is for use only in this action and by the making of it I shall not be liable for any costs, expenses, damages or any payment whatsoever, except for any applicable excess of my policy and, if VAT registered, the VAT element of any costs incurred in the defence to this action.

I am not VAT registered

I am VAT registered. My VAT registration number is

Signed Position.....

Dated:

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[REDACTED]

Subject: VAT
Date: Thu Jul 26 09:38:57 BST 2012
From: [REDACTED] <[REDACTED]>
To: "Matthew [REDACTED]" <[REDACTED]>
Attachments: [REDACTED]

Mornin'

Given that we now charge VAT on all bills, and therefore there is a need to know if the insured is VAT registered, might it be useful if altering the FoA to include a place for them to fill in their details? The current FoA also says they will not be liable for any expenses, which isn't strictly true if we're going to start sending them VAT bills (albeit they can claim it back).

Yours &c.,

G [REDACTED]

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[REDACTED]
Subject: Amended FOA
Date: Mon Jul 30 09:14:00 BST 2012
From: "M [REDACTED]"
To: "G [REDACTED]"

Attachments: "[REDACTED].pot" 25.00KB

Following on from an idea G [REDACTED] had last week, please see attached amended FOA. These should be produced automatically by matter centre from today onwards. It incorporates some additional text relating to VAT given the change in the way in which we are required to treat VAT on our invoices.

M [REDACTED]
on behalf of [REDACTED] Solicitors

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]