

TASKS OF LEGAL SECRETARIES
IN OKLAHOMA

By

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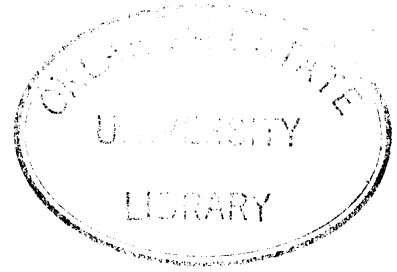
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IN OKLAHOMA

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PREFACE

This study is concerned with the tasks performed by legal secretaries in the State of Oklahoma. The primary objective was to determine the frequency such tasks were performed to see if the task should be incorporated in a training program. I found that the tasks described in the check lists returned were included in the material being taught to prospective legal secretaries.

I wish to express my appreciation to Dr. Lloyd Wiggins for his encouragement, guidance, and assistance throughout this study, and to Dr. Richard Tinnell for his assistance and guidance in the preparation of the final manuscript.

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CHAPTER I

INTRODUCTION

Background Information

When the legal secretarial program was implemented at Oklahoma State Tech, no extensive studies were made to investigate the duties and responsibilities of legal secretaries. The curriculum was designed so that last trimester secretarial science majors could specialize in legal work. One needs to know the activities trainees will most likely perform in their daily employment, and what specific activities probable employers are likely to demand of them as legal stenographic workers. All students should have the opportunity to gain practice at approximately the same level of office employment at which they are most likely to be employed. Standards and requirements change, particularly in legal offices, and work tends to become highly systematized and mechanized. These trends and tendencies should not be ignored but need to be reflected in the school's program.

It is the responsibility of business educators of the school in cooperation with the business agencies of the community it serves, and to assemble these facts and requirements. This, of course, requires research, and is the major concern of this investigation.

Statement of the Problem

This investigation is a study of the policies and practices of law

office personnel to determine the tasks required of legal clerical personnel.

Need for the Study

A student who completes the general secretarial course and enters the field as a legal secretary will be at a disadvantage in attempting to carry on the important and highly technical tasks involved because the training has no provision for handling them efficiently. Such a person has a definite need for specialization beyond the basic skills. It is the school's responsibility to produce secretaries who can step into positions and assume the duties of a legal secretary with very little difficulty.

Purpose of the Study

A specialized course in which emphasis is placed upon the most important tasks which make up the legal secretary's day in the average law office should be designed. So far as is evident, no job analysis of this type has yet been made in this area, and until one is made, any specialized course offered for legal secretaries will surely be found wanting in many respects when it comes to meeting local demands. The purpose of this study is to identify tasks performed on the job by legal secretaries in Oklahoma.

Research Questions

This research attempts to answer the following questions thru a job analysis survey of legal secretaries in Oklahoma:

1. What specific duties does the legal secretary perform?
How frequently?
2. What routine secretarial, stenographic, or clerical duties
are required of the legal secretary? How frequently?
3. What are the skill requirements in shorthand and typewriting?
4. What type of equipment is used in dictation? in transcribing?
in general office work?

CHAPTER II

REVIEW OF LITERATURE

At the beginning of this research a thorough search was made at the University library for any literature relating to the legal clerical worker. The purpose of this perusal was to ascertain what had been written in this field which might be of value as source material and, at the same time, to insure that this study would not be a duplication of some previous work.

The scarcity of literature in the legal secretarial field was amazing. A few good periodical articles were found containing general theory on the subject of legal secretaryship, and a limited number of books devoted to secretarial procedures, legal typewriting, graded dictation material, and legal terminology. A study made by Barclay (1949) on the legal secretary was found. This study differed from the study under consideration in that it was concerned with a job analysis of legal secretaries in the State of California.

The Barclay study found that most secretaries had no legal training in school, and that it was necessary for them to spend a considerable amount of time in on-the-job training before they could perform their duties efficiently.

A study by Ford (1954) on the policies and practices of law offices further pointed to a need for a study of the duties of a legal secretary and the need for specialized training in this area. Ford's

study was restricted to the State of Michigan. Since both the Barclay and Ford study was made prior to 1955, this study would not be a duplication of a previous work in that so many technological changes have taken place since that time and the fact that these studies surveyed a specific area much different than the State of Oklahoma.

Bluhm (1977), in an article, gave her ideas about specialized training in the legal field. The article was concerned with different areas to include in training students. It also emphasized the need for the person designing the training to get out into the business world and visit law offices to enlist assistance of personnel "on the job."

Garrison (1975), in an article, presented her ideas as to the future legal secretary. This article also pointed out the need for specialized training to meet the needs of employers today. While this article did not mention the specific duties, it did point out that specialized training would help an employee reach a paraprofessional level and the opportunity to advance in one's profession.

Handbook for the Legal Secretary, a book written primarily for the State of California legal workers is a very helpful book (Leslie & Coffin, 1958). Legal procedure varies in each state, county, and court; so it was suggested to ascertain the local court rules and check with the clerk's office or elsewhere, to determine that the procedures used in this book could be used locally. The forms and procedures which the authors consider of prime importance to the legal secretarial worker were not consistent with our state and could only be used for reference. In fact, other than shorthand outlines and practice dictation material, it is more of a reference book than a text book. Neither does the book cover everything a legal secretary or clerical

worker should know. The Glossary of Legal Terms and Shorthand Forms would be very helpful as it is perhaps the most complete glossary of its type.

Manual for the Legal Secretarial Profession (1974), is a book for the career legal secretary. It is designed to assist the professionally minded legal secretary whether she is currently employed in a law office or preparing for such a career. The book emphasizes the professional rather than the purely routine or clerical aspects of the work of the legal secretary. The author points out that the book is not a substitute for experience; that professional improvement results from a combination of education and experience. The book devotes little attention to details which must be acquired through actual experience. The text is intentionally general. There are thousands of jurisdictions in the United States and procedures are not identical in any two of these. The work recognizes that legal procedures and legal secretarial practices change almost daily, and that it is the responsibility of the legal secretary and her employer to keep up with changes. This book is a valuable reference in the instruction of legal training.

Legal Secretaryship was a most helpful book in developing the check list (Blackburn, 1971). The book identified the many areas that should be incorporated on the check list. The book was concise in the discussion of secretarial duties in connection with the preparation of the various documents. While not a text in itself, it is a valuable reference book that can benefit a legal secretary.

Secretarial Procedures and Administration describes many of the tasks that are performed in all offices including the law office (Hanna, Popham, and Tilton, 1973). It is an excellent source of information

for the aspiring professional legal secretary. The information in this book was also very helpful in determining the type of information that should appear on the check list.

Many of the articles and books mentioned contributed information of value, but no single one in itself was sufficient in giving a detailed list of duties required of legal clerical personnel. This would indicate that a study in this area is definitely needed.

The need for relevant information about the duties of legal secretaries is apparent and materials are scarce in defining these duties. Although there are facts and opinions available as well as books and recorded experiences, there is needed a basis for selecting information for training future students in the specific duties that are most frequently performed.

By using a questionnaire, a more exact knowledge of the activities of legal secretaries can be ascertained. Thus, it is possible that proper training can be given to students wishing to specialize in the legal secretarial field. Instructions given these students would permit them to perform the same type of duties they would encounter on the job.

CHAPTER III

METHODOLOGY

If completely trained secretaries with a working knowledge of the duties involved in a law office are to be produced, it becomes essential to give them specialized training commensurate with the activities they will encounter on the job. The duties of legal clerical personnel in various positions will no doubt differ markedly in many respects. Therefore, a course of this type, to be worthwhile, must offer training in those duties with which the majority of secretaries will be involved.

Respondents to be surveyed are secretaries who hold membership in the Oklahoma Legal Secretaries Association and represent all areas of the State of Oklahoma.

In order to ascertain the frequency of the duties performed by the secretaries, a questionnaire was chosen as the medium by which the survey could be conducted.

In constructing the check list to be used in the survey, the first problem was to assemble a tentative list of all duties that could possibly be included in a position of this nature with no attempt being made to filter out those thought to be of little value. This master list, constructed from available literature, was lengthy and constituted a good basis from which to form a final list. The list was then submitted to three legal secretaries with considerable experience and to two attorneys. Many items were eliminated as being outmoded or not

applicable to Oklahoma, and many were added to the list. These were either those pertinent to the locality alone or newly devised forms and shortcuts not found in literature.

The list was then broken down into specific categories such as: taking dictation; typewriting; using communication services; meeting the public; collecting information, composing, editing; operating other office machines; handling the mail; performing general office duties; organizing and using files; and keeping financial records.

When this process was completed, the revised check list was drafted and presented to three legal secretaries for them to fill out. Ambiguous questions were revised then and there. After such changes were made, the form was duplicated.

Locally, the questionnaires were delivered personally. The remainder were mailed to legal secretary chapter presidents for delivery to secretaries in the respective areas. A stamped addressed envelope was enclosed with each questionnaire to make it as easy as possible to return the questionnaire.

When a period of four weeks elapsed, chapter presidents were mailed a reminder in an effort to find out what disposition had been made of the check list. They again helped with the follow-up.

As the questionnaire forms were returned, the results were tabulated on master sheets set up for this purpose. The duties performed by the legal clerical workers were checked to find out whether they were performed regularly, sometimes, or never; and whether a "fill-in" was required.

As a result, the frequency ranking of the duties performed were obtained and put into tabular form. This method of tabulating seemed

to lend itself suitable for reporting the results of the questionnaires and the frequency ranking of the duties performed by legal clerical workers.

No blank was provided in the check list to determine whether the secretaries worked in small, medium, or large offices. Therefore, it is not known whether all sizes of offices are adequately represented. Answers would naturally differ depending on the situation. Also unknown is know many of the secretaries were responsible to one attorney and how many to more than one attorney.

The secretaries were asked to check whether the office in which they worked was a general or specialized legal firm. Many left this question blank. Others, who checked general, went on to fill in the blank that their offices were specialized to a certain degree. Of those who checked that they were employed in a specialized firm, no one specialization was listed by more than five secretaries; and there were many different specializations listed. Some of the secretaries replied that their work was not for a law firm engaging in legal practice, but rather in the legal department of a corporation. For these reasons, no exact tabulation was made of how many of the returns were from general and specialized firms.

In spite of these limiting factors, and the fact that some of the secretaries did not understand the intent of the questions, it is felt that this study proved beneficial in determining if our curriculum meets the needs of industry. The results do show the extent to which certain routine and special duties are performed in various offices. The tabulation of the returned check lists indicates those duties which are performed regularly and those performed only sometimes. Any

secretary, legal or otherwise, may be called upon to perform any one or all the duties listed at one time or another. The main purpose of the check list used in this study was to determine which duties should be given the most emphasis in the course of study.

CHAPTER IV

RESULTS

Of the 200 check lists distributed, 115 or approximately 58 percent were returned. This better-than-average return was considered to be an adequate sampling from such a select group as the one surveyed. It is felt that the high percentage of replies was due principally to the excellent cooperation and genuine enthusiasm of the members of the association, evidencing their belief in the real need for specialized training in school for this occupation.

The total of 115 returns does not include several check lists which were returned blank because the particular secretaries were no longer employed in strictly legal work or for some similar reason. Also, some secretaries did not check all blanks on the form accounts for some categories not totaling 115 returns.

The total figure was used to draw most of the major conclusions in the study. In many of the categories, a ranking of the duties in the order of those most frequently checked was used for the analysis. In other instances, a percentage of returns seemed to give a better picture for comparison and analysis and, therefore, was used. In some categories only the results of the "regular" column were considered; whereas, in other categories it was felt that the supporting figures in the "sometimes" column were important enough to warrant inclusion.

Taking and Transcribing Dictation

Method of Transcribing Dictation

Transcribing from machines was checked by a large majority of the legal secretaries and ranked first (Table I) as the most frequent method of transcribing dictation. In addition to the use of machines, however, a number of the secretaries checked that they were regularly required to take and transcribe shorthand notes.

TABLE I
METHOD OF TRANSCRIBING DICTATION

Method	Number	Rank
Regularly Performed Duties		
Transcribe from Machine	65	1
Shorthand Notes	31	2
Directly to Typewriter	9	3
Duties Performed Sometimes		
Shorthand Notes	57	1
Directly to Typewriter	48	2
Transcribe from Machine	26	3

Table I also shows which methods are used "sometimes" in comparison with those used "regularly." Although taking dictation and transcribing directly to the typewriter ranked third as regularly used method, it ranked second as a method employed sometimes. It is noted

that a total of 37 checked that shorthand was never used. Only three of all the secretaries checked that they ever used the stenograph.

Speed of Dictation

In an analysis of shorthand speeds, it must be remembered that these are only approximations made by the secretaries. Many of the secretaries wrote notes stating that it had been so long since they had been timed their answers might be far from correct. Of the check lists returned, 40 percent did show a speed; but whether these are approximate or exact speeds cannot be determined. Table II shows the various speeds of the respondents.

TABLE II
DICTATION SPEED

Words Per Minute	Total*
60 - 80	35%
80 - 90	24%
90 -100	29%
100 or more	12%

*Percentage of total returns

Types of Dictation

The taking of letters and memos ranked first and second as the dictation duties performed most frequently. Table III points out this

TABLE III
 TYPES OF DICTATION*

Duty	Number	Rank
Letters	85	1
Memos	60	2
Reports	28	3
Minutes of Meetings	19	4
Telephone Conversations	14	5
Speeches	8	6
Legal Documents in entirety:		
Petitions	63	1
Answers	59	2
Affidavits	52	3
Acknowledgments	50	4
Divorce Cases	49	5
Briefs	45	6
Wills	43	7
Interrogatories	38	8
Deeds	36	9
Mortgages	35	10
Leases	34	11
Power of Attorney	25	12

*Regularly Performed Duties

fact and also shows the ranking of other types of dictation which are taken regularly. The taking of legal documents in their entirety was listed and ranked separately on the table in an attempt to show which specific documents were taken in entirety most frequently. However, if this had been included with the ranking of other items, legal documents in entirety would have ranked at least third or possibly higher. The figures in Table III indicate that even in a law office where much of the dictation may be technical, routine correspondence still plays an extremely important part. Therefore, the ability to set up attractive letters and memos is one required of all good legal secretaries.

In the ranking of legal documents taken in entirety, petitions, answers, affidavits, and acknowledgments were the four most frequently taken documents. All the documents listed except one (depositions) were checked by more than half the secretaries. "Other documents" included a number of different documents. The secretaries were asked to fill in any document taken from dictation regularly which was not included in the list. No tabulation was made of these different documents because in going through the check lists it was noted that no one document was listed by more than a few secretaries.

Typewriting

Kind of Typewriter Used

As can be seen on Table IV, 84 percent of the secretaries returning the check lists use an electric typewriter, and 57 percent use some type of automatic typewriter. The executive typewriter was used by 35 percent of respondents. It can be assumed that a majority of legal firms are equipping their offices with automated equipment. This shows

that there has been a definite change in the training of students in the typewriting area. Only two of the respondents reported using a manual typewriter at all.

TABLE IV
KIND OF TYPEWRITER USED

Kind of Machine	Number*	Rank
Electric	84%	1
Automatic	57%	2
Executive	35%	3

*Percentage of total returns

Speed of Typewriting

The same fact holds true for the analysis of typewriting speeds as was true of shorthand speeds - these are only approximations made by secretaries themselves. Another thing which must be remembered when discussing typewriting speeds is whether the speeds are gross, correct, or net words per minute is unknown. Also unknown is whether the speeds are for a short period of time or whether they are for sustained timing.

Typewriting rates were filled in on 70 percent of the returned check lists. Table V shows that almost 34 percent of those reporting a speed type at least 70 words per minute; 19 percent type at least 80 words per minute; and 21 percent type 90 or more words per minute.

TABLE V
TYPEWRITING SPEEDS

Words Per Minute	Total*
60 - 70	26%
70 - 80	34%
80 - 90	19%
90 or more	21%

*Percentage of total returns

No attempt was made to correlate speeds as to whether they were attained on a regular electric typewriter or on an automatic typewriter. However, since a majority of the secretaries checked that they use a regular electric typewriter, it might be assumed that a majority of the reported speeds were attained on regular electric typewriters.

Kinds of Typewriting

In the ranking of duties in the typewriting category, the straight-copy typing of letters, memos, reports, etc. ranked first; however, several things must be kept in mind when studying Table VI. If the typing of legal documents, whether using previously prepared documents as guides or using fill-ins had been included with the ranking of other items, legal documents would have ranked first. Also to be remembered is that the transcription of letters from shorthand notes is not included in this category at all but has already been discussed in the category with dictation duties.

TABLE VI
KINDS OF TYPEWRITING

Duty*	Number	Rank
Letters, Memos, Reports (Copying)	74	1
Letters, Memos, Reports (Longhand Notes)	30	2
Ditto Masters	12	3
Legal Documents using previously prepared documents as guides:		
Acknowledgments	78	1
Affidavits	77	2
Petitions	74	3
Summons	73	4
Answers	71	5
Verifications	70	6
Deeds	59	7
Wills	56	8
Mortgages	54	9
By Laws (Corporate)	52	10
Leases	49	11
Partnership Agreements	47	12
Contract for Sale of Real Estate	47	12
Power of Attorney	46	13
Guardianship	43	14
Garnishment	42	15
Abstracts	37	16
Proxy	24	17
Deposition	21	18
Legal Documents (fill-ins):		
Summons	66	1
Subpoena	55	2
Verification	54	3
Acknowledgment	53	4
Deed	52	5
Mortgage	48	6
Affidavit	46	7
Petition	44	8
Leases	36	9
Garnishment	32	10
Contracts	31	11
Order to Show Cause	31	11
Writs	23	12
Power of Attorney	22	13
Guardianship	22	13
Injunction	13	14
Proxy	12	15

*Regularly Performed Duties

In the ranking of legal documents using previously prepared documents as guides, the typing of acknowledgments ranked first with affidavits following. Table VI does show that quite a few of the documents listed were checked on more than half the returned check lists. In these two rankings, as was true in the ranking of legal documents taken from dictation in entirety, "other documents" included many miscellaneous documents listed by the secretaries as being used in their particular offices.

Legal documents were listed separately in the typewriting category, as they were in the dictation category, in an attempt to determine which documents were most frequently drawn up in each manner. In checking through some specific returns, it was noted that the same documents were checked in the regular column in all three places. At first thought, this might not seem logical; however, in some offices all three ways (taking from dictation in entirety, using previously prepared documents as guides, and using fill-ins) may be employed regularly. The method which is used depends on the specific case and the individuals involved.

Erasing on Legal Documents

An attempt was made to determine the amount of erasing permitted on legal documents. In answering this question, 68 of the 112 secretaries said that erasing was permitted; and 32 checked that erasing was limited. Some listed that erasing was limited in several ways while others did not answer "to what?" erasing was limited. One of the most frequently occurring limitations was to "neatness" or in the words of other secretaries to erasures that are "hardly noticeable." Other secretaries stated that erasures were limited depending on the nature

of the document, and the document listed most frequently which could not contain erasures was a will. Erasures were also listed as being limited in places where an erasure could be made that would change the meaning of a document such as dates and sums of money.

Operating Office Machines

A large majority of the secretaries returning the check lists as shown on Table VII checked that they were required to use an adding machine. The other machines listed were checked by less than half the secretaries as ever being used. A good secretary should be skilled in using the various machines.

TABLE VII
OFFICE MACHINES USED

Machine	Regularly	Sometimes
Ten Key Adding Machine	37	42
Printing Calculator	26	26
Fluid Duplicator	14	7
Mimeograph	5	1

Handling the Mail

The most frequently performed duty in handling the mail is determining the amount for postage. A majority of the secretaries also

checked that they were regularly responsible for accepting papers and packages, reading incoming mail, stamping incoming mail, and opening and sorting incoming mail. The figures indicate that the good secretary must be familiar with all the best procedures in handling the mail.

TABLE VIII
HANDLING THE MAIL

Duty	Number	Rank
Duties performed regularly		
Determine Amount for Postage	70	1
Accept Papers and Packages	67	2
Read Incoming Mail	62	3
Stamp Mail by Hand	60	4
Open and Sort Incoming Mail	51	5
Sign for Registered Mail	47	6
Annotate Letters	30	7
Duties performed sometimes		
Sort Mail	39	1
Annotate Letters	39	1
Open Incoming Mail	37	2
Sign for Registered Mail	37	2
Read Incoming Mail	32	3
Accept Papers and Packages	31	4
Determine Amount for Postage	20	5
Stamp Mail by Hand	18	6

Using Communication Services

Among the duties listed which relate to the use of telephone and telegraph facilities, the taking of messages about calls and bringing

them to the attention of the employer ranked first (Table IX) as a regularly performed duty. Answering the telephone ranked second, and making long distance calls ranked third on the list. Because the telephone does play such an important part in any office, the legal secretary, as well as any other good secretary, should always be correct and courteous in the use of the instrument.

TABLE IX
USING COMMUNICATION SERVICES

Duty	Number	Rank
<hr/> Duties performed regularly		
Take Messages about Calls and bring them to Attention of Employer	82	1
Answer the Telephone	66	2
Make Long Distance Calls	62	3
Keep Record of Telephone Calls	61	4
Place General Outgoing Calls	56	5
Route Callers	51	6
Operate Switchboard	8	7
Send Telegrams	3	8
<hr/> Duties performed sometimes		
Place Outgoing Calls	42	1
Make Long Distance Calls	41	2
Answer the Telephone	40	3
Route Callers	38	4
Send Telegrams	31	5
Keep Record of Telephone Calls	25	6
Take Messages about Calls and bring them to Attention of employer	24	7
Operate Switchboard	12	8

Operating a switchboard and sending telegrams, which ranked very low, were the only duties listed which were not checked by a majority of the secretaries as being performed regularly. Only eight of the secretaries stated that they were regularly required to operate the switchboard, and the twelve who operated a switchboard sometimes probably did so as relief operators.

Only three of the secretaries checked that they regularly sent telegrams while 31 checked they did this task sometimes.

Meeting the Public

The figures in Table X indicates that the majority of legal secretaries must know how to personally greet people coming into the office in a courteous and pleasant manner. Less than 50 percent checked that they were ever called upon to help entertain clients or business associates.

Collecting Information, Composing, Editing

Table XI shows that a majority of the legal secretaries returning the check lists were responsible, at one time or another, for the composition of written communications. The composition from oral instruction ranked first as the most frequently performed duty in the category. A close ranking second was the composition on their own initiative. Although less than half of the secretaries checked that they were regularly required to perform any of the other duties in this group, more than half of the secretaries were responsible at least some of the time for all the duties except gathering material for speeches and making digest of articles, letters, or books.

TABLE X
MEETING THE PUBLIC

Duty	Number	Rank
<hr/> Duties performed regularly		
Make Appointments	69	1
Screen Callers	54	2
Act as Receptionist	49	3
Help Entertain Visiting Clients or Business Associates	15	4
<hr/> Duties performed sometimes		
Act as Receptionist	46	1
Screen Callers	39	2
Help Entertain Visiting Clients or Business Associates	36	3
Make Appointments	27	4

The figures in Table XI indicates that legal secretaries should have the ability to accurately compose acceptable communications whether on their own initiative or with some assistance from instructions, notations, etc. In addition, secretaries need to know where to find information for/about cases in which their employer is interested. They must also be capable of sifting and organizing facts for legal documents.

Performing General Office Duties

Of the general office duties listed, serving as a notary ranked first as the most frequently performed task. The second ranking item of the duties performed regularly is that of keeping a daybook or diary.

TABLE XI
COLLECTING INFORMATION, COMPOSING, EDITING

Duty	Number	Rank
<hr/> Duties performed regularly		
Compose Written Communication		
from oral instructions	65	1
on own initiative	57	2
from longhand notes	48	3
from form letters	47	4
Gather Information for/about		
Cases	35	5
Sift and Organize Facts	31	6
Make Digest of Articles, Letters, or Books	9	7
Gather Material for Speeches	6	8
<hr/> Duties performed sometimes		
Gather Information for/about		
Cases	44	1
Sift and Organize Facts	42	2
Compose Written Communication		
from longhand notes	42	2
on own initiative	38	3
from form letters	38	3
from oral instructions	30	4
Make Digest of Articles, Letters, or Books	25	5
Gather Material for Speeches	16	6

The majority of the secretaries indicated that they were required at least some of the time to organize office routine and to plan or schedule each day's work. Every good secretary should do some planning of her own work for the day, but these figures show that legal secretaries may be responsible for the smooth running operation of an entire office.

Since more than half the secretaries also checked that they at least sometime had to make hotel and transportation reservations, a good secretary should know where she can find any information she may need in carrying out these responsibilities. She should be familiar with the various types of accommodations provided by hotels and motels. She should also be able to read both rail and airline timetables and know the kinds of accommodations available on each of these modes of transportation. She should become familiar with the travel agencies in her locality. A knowledge of foreign travel requirements would be very helpful in the event an employer went out of the country.

More than half indicated they kept confidential personal records for the employer which indicates that legal secretaries must be loyal to their employers and be able to keep confidential matters to themselves.

Since most legal secretaries will act as librarian for the office law library, each should become thoroughly familiar with library procedures.

Less than half the secretaries checked that they were ever required to supervise clerical and stenographic employees or screen applicants for office jobs. Perhaps the secretaries who checked "never" to these items worked in small or one-girl offices where they would not be required to perform such duties.

Table XII shows the general office duties that are performed on a regular basis and those that are performed sometimes. The figures on this table should not be interpreted to mean that duties checked by less than half the secretaries are unimportant, but simply that these specific duties are not required in all offices.

TABLE XII
PERFORMING GENERAL OFFICE DUTIES

Duty	Number	Rank
<hr/> Duties performed regularly		
Serve as notary	83	1
Keep daybook or diary	66	2
Keep follow up or tickler file	55	3
Keep confidential personal records for employer	46	4
Order Office Supplies	44	5
Keep the Legal Justice Docket	43	6
Plan or Schedule Each Day's Work	36	7
Organize Office Routine	30	8
Act as Librarian for Office (law) Library	28	9
Screen Applicants	22	10
Make Hotel and Transportation Reservations	20	11
Prepare Travel Itineraries	19	12
Delegate Work	19	12
Arrange Office Layout	18	13
Keep a Clipping File	17	14
Supervise Clerical Employees	14	15
Prepare Employer's Brief Case for Trips	12	16
Attend Court	11	17
Help Plan and Organize Office Social Affairs	11	17
Mark Articles to the Clipped	10	18
Prepare Agenda for Meetings	9	19
<hr/> Duties performed sometimes		
Make Hotel and Transportation Reservations	52	1
Plan or Schedule Each Day's Work	49	2
Delegate Work	47	3
Organize Office Routine	41	4
Help Plan and Organize Office Social Affairs	41	4
Prepare Employer's Brief Case for Trips	38	5
Act as Librarian for Office (law) Library	37	6
Prepare Travel Itineraries	35	7
Keep Confidential Personal Records for Employer	33	8
Mark Articles to be Clipped	33	8
Attend Court	29	9
Order Office Supplies	29	9

TABLE XII (Continued)

Duty	Number	Rank
Arrange Office Layout	27	10
Keep a Clipping File	25	11
Supervise Clerical Employees	22	12
Keep a Follow Up or Tickler File	22	12
Keep Legal Justice Docket	18	13
Keep Daybook or Diary	16	14
Screen Applicants	12	15
Serve as Notary	8	16

Keeping Office Financial Records

Duties

The sending of statements to clients ranked first (Table XIII) as the most frequently performed duty in the category pertaining to office financial records. In addition, a majority of the secretaries checked that they were required (if not regularly at least sometimes) to handle the banking business for their offices. This includes writing checks, making deposits, keeping the checkbook, and reconciling bank statements. About half of the secretaries were also responsible at least some of the time for keeping expense records of cases, keeping trust account, and preparing office payrolls. The other duties in this category were checked by less than half the secretaries as ever being performed; however, this fact does not make these duties any less important. The figures in these tables all point out that a top-flight legal secretary should have the ability to handle office financial records to some degree.

TABLE XIII
KEEPING OFFICE FINANCIAL RECORDS

Duty	Number	Rank
<u>Duties performed regularly</u>		
Send Statements to Clients	56	1
Write Checks	43	2
Make Deposits	43	2
Maintain Clients Ledger	42	3
Keep Checkbook	37	4
Keep Expense Record of Cases	37	4
Keep Trust Account	36	5
Reconcile Bank Statement	30	6
Prepare Office Payrolls	30	6
Post to Ledgers	28	7
Cash Journal	27	8
Accounts Payable Journal	27	8
Keep Travel Expense Records	26	9
Prepare Quarterly Income Tax and FICA Reports	25	10
General Ledger	24	11
Petty Cash Ledgers	20	12
Keep Insurance Records	18	13
Prepare Income Statement	11	14
Prepare Balance Sheet	11	14
Prepare Trial Balance	8	15
Prepare Office Budget	5	16
<u>Duties performed sometimes</u>		
Write Checks	27	1
Make Deposits	24	2
Send Statements to Clients	22	3
Keep Expense Record of Cases	20	4
Keep Travel Expense Records	19	5
Keep Checkbook	16	6
Reconcile Bank Statement	12	7
Keep Trust Accounts	12	7
Maintain Clients Ledger	12	7
Prepare Office Budget	11	8
Petty Cash Ledger	11	8
Prepare Office Payroll	10	9
Keep Insurance Records	10	9
Accounts Payable Ledger	10	9
Post to Ledgers	10	9
Keep Investment Records	9	10
Cash Journals	9	10
General Ledger	8	11
Prepare Trial Balance	8	11

TABLE XII (Continued)

Duty	Number	Rank
Prepare Trial Balance	7	12
Prepare Income Statement	7	12

Comments on returned check lists indicated that most of the accounting was done by the accounting department within the organization or by an outside public accounting firm. It is important, however, that legal secretaries be knowledgeable of financial records.

Organizing and Using the Files

The filing of clients' records, as can be seen on Table XIV, was checked as a task performed by 94 percent of the secretaries returning the check list. The keeping of general correspondence files and the employer's personal files were also checked by a majority of those reporting. The alphabetic method of filing was the system most frequently used by legal secretaries. Since the numeric and geographic methods were also checked by a number of secretaries, it might safely be stated that legal secretaries should be familiar with more than one method of filing. Several respondents commented that they used both alphabetic and numeric methods of filing depending on the type of file. Good records management practices are very necessary to the secretary in controlling her files and in understanding the management aspects of records control including retention and transfer of files.

TABLE XIV
ORGANIZING AND USING THE FILES

Duty	Percentage*
Clients Files	94%
General Correspondence	92%
Employers Files	88%
<hr/>	
Method Used in Filing	
Alphabetic	93%
Numeric	75%
Geographic	11%

*Percentage of returns

CHAPTER V

SUMMARY OF FINDINGS

The results of the survey indicates that the duties of legal secretaries are many and varied and are not limited to what might be considered as strictly legal tasks. The extent to which certain duties are performed will vary with the particular situations existing within different offices. Miller (1958) very aptly expresses this fact in her handbook for legal secretaries:

In a small law office the work and responsibilities of all the service departments fall on the secretary. In a large office, some of the responsibilities are hers, in any event she should be familiar with them so that she can cooperate properly with other departments (p. 11).

Several of the secretaries made note of this fact on their returned check lists, but no attempt was made to determine whether all sizes of offices were equally represented. As a result, the validity of these findings may be questioned because of a possible bias resulting from the sample used and possible weaknesses in the check list.

In the analysis of dictation duties, it was found that a large majority of the secretaries replied that they used transcribing machines most frequently in dictation-transcription. However, a number of the secretaries replied that they used shorthand or took dictation directly to the typewriter. The requirements for speed in taking shorthand were discovered to be average for students graduating from our program. About one-half the firms required shorthand for the

position. As to the types of dictation taken most frequently, routine correspondence ranked first above legal documents.

Some type of electric typewriter was used in all offices with approximately one-half using automatic equipment. Typewriting speed requirements were also fairly high in the legal offices represented. In the discussion of the kinds of typewriting duties, transcription from shorthand notes was not included. Therefore, the typing of legal documents using previously prepared documents as guides or using fill-ins was the most frequently performed typewriting duty, followed closely by the straight-copy typing of letters, memos, and reports. Most of the secretaries indicated that erasing was permitted on legal documents in their offices; however, more than one-half of the secretaries went on to say that erasing was limited to some extent.

In the use of office machines, the ten key adding machine and the printing calculator were checked as being used by a majority of the secretaries.

All of the duties listed in the category "Handling the Mail" were checked by a majority of the secretaries as being performed at least some of the time. Legal secretaries, therefore, should be familiar with post office requirements for handling the mail as well as being familiar with the services that the post office offers to mailers.

As expected, the use of the telephone was found to play an extremely important part in legal offices. Only a few of the secretaries checked that they were ever required to operate a switchboard, and less than one-half were responsible for sending telegrams. Secretaries should be familiar with this type of communication.

The responses to the duties having to do with "Meeting the Public" indicated that the good legal secretary must know how to personally greet people coming into the office in a courteous and pleasing manner.

A majority of the secretaries checked that they were responsible for the composition of written communication.

Serving as a notary was the most frequently performed task among the general office duties listed.

The secretaries indicated that they were required to have some ability in the handling of the financial records in their offices.

The last section of the check list showed that the secretaries were responsible for organizing and using the files in their offices. The alphabetic method of filing was checked as being used more than any other system.

All of these findings indicate that the Legal Secretarial Program at Oklahoma State University School of Technical Training, Okmulgee Branch, incorporates in its training all of the duties and responsibilities which may fall upon the secretary in a legal office. The typewriting and shorthand skill requirements are equal to or exceed industry requirements. As transcribing from machines and the use of automatic typewriters have become more prevalent in law offices, our program of study has been modified to include a class in Word Processing Equipment utilizing several different types of automatic typewriters. Our major conclusion is that Oklahoma State University School of Technical Training is supplying industry with employees who are able to function and succeed as a legal secretary with a minimum of on-the-job training.

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APPENDIX A

CHECK LIST FOR THE LEGAL SECRETARY

CHECK LIST FOR THE LEGAL SECRETARY

Please check () the frequency each of the following duties are performed by you.

	Regu- larly	Some- times	Never
<u>TAKING DICTATION</u>			
Take and transcribe shorthand notes	_____	_____	_____
Take dictation directly to the typewriter	_____	_____	_____
Take dictation from machine	_____	_____	_____
Use the stenograph	_____	_____	_____
Take the following types of dictation:			
letters	_____	_____	_____
Memos	_____	_____	_____
reports	_____	_____	_____
speeches	_____	_____	_____
minutes of meetings	_____	_____	_____
telephone conversations	_____	_____	_____
Legal documents in entirety:			
briefs	_____	_____	_____
Petitions	_____	_____	_____
answers	_____	_____	_____
depositions	_____	_____	_____
wills	_____	_____	_____
abstracts	_____	_____	_____
deeds	_____	_____	_____
mortgages	_____	_____	_____
leases	_____	_____	_____
divorce cases	_____	_____	_____
power of attorney	_____	_____	_____
acknowledgments	_____	_____	_____
proxy	_____	_____	_____
affidavit	_____	_____	_____
interrogatories	_____	_____	_____
List others not mentioned:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

TYPEWRITING

	Regu- larly	Some- times	Never
Use Manual Typewriter	_____	_____	_____
Use Electric Typewriter	_____	_____	_____
Use Executive Typewriter	_____	_____	_____
Use Automatic Typewriter	_____	_____	_____
Type the following:			
Letters, memos, reports,			
(Copying from previous)			
(From longhand notes)			
Stencils			
Masters			
Legal documents using previously			
prepared documents as guides:			
Petitions			
Answers			
Affidavits			
Acknowledgments			
Depositions			
Verifications			
Garnishments			
Guardianships			
Power of Attorney			
Proxy			
Wills			
Abstracts			
Deeds			
Mortgages			
Leases			
By-Laws (Corporate)			
Partnership Agreements			
Contract for sale of real estate			
Other Documents:			
_____	_____	_____	_____
_____	_____	_____	_____

USING COMMUNICATION SERVICES

Operate switchboard	_____	_____	_____
Answer the telephone	_____	_____	_____
Take messages about calls and bring them to attention of employer	_____	_____	_____
Route Callers	_____	_____	_____
Keep record of telephone calls	_____	_____	_____
Place general outgoing calls	_____	_____	_____
Make long distance calls	_____	_____	_____
Send telegrams	_____	_____	_____

MEETING THE PUBLIC

Act as receptionist	_____	_____	_____
Screen Callers	_____	_____	_____

MEETING THE PUBLIC (Con't)	Regu- larly	Some- times	Never
Make appointments	_____	_____	_____
Help entertain visiting clients or business associates	_____	_____	_____
<u>COLLECTING INFORMATION, COMPOSING, EDITING</u>			
Assist with the preparation of legal documents	_____	_____	_____
Gather information for/about cases (such as facts about clients, etc.)	_____	_____	_____
Sift and organize facts	_____	_____	_____
Make digests of articles, letters, or books	_____	_____	_____
Compose written communications:			
from oral instructions	_____	_____	_____
from form letters	_____	_____	_____
from longhand notes	_____	_____	_____
on own initiative	_____	_____	_____
Other:	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Legal documents (fill-ins):			
Order to show cause	_____	_____	_____
Affidavit	_____	_____	_____
Acknowledgment	_____	_____	_____
Verification	_____	_____	_____
Summons	_____	_____	_____
Subpoena	_____	_____	_____
Petitions	_____	_____	_____
Guardianships	_____	_____	_____
Garnishments	_____	_____	_____
Writs	_____	_____	_____
Injunction	_____	_____	_____
Power of Attorney	_____	_____	_____
Proxy	_____	_____	_____
Deeds	_____	_____	_____
Mortgages	_____	_____	_____
Leases	_____	_____	_____
Contracts	_____	_____	_____
Other documents:	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<u>OPERATING OTHER OFFICE MACHINES</u>			
Operate a mimeograph	_____	_____	_____
Operate a fluid duplicator	_____	_____	_____
Operate Off Set	_____	_____	_____
Operate 10 key adding machine	_____	_____	_____

OPERATING OTHER OFFICE MACHINES (Con't)

Regu-
larly

Some-
times

Never

Operate Printing Calculator
Other Machines:

HANDLING THE MAIL

Open incoming mail
Accept papers and packages
Stamp mail by hand
Sort mail
Sign for registered mail
Read incoming mail
Determine amount for postage
Annotate letters

PERFORMING GENERAL OFFICE DUTIES

Act as librarian for office (law) library
Mark articles to be clipped
Keep a clipping file
Organize office routine
Arrange office layout
Plan or schedule each day's work
Delegate work
Supervise clerical employees
Screen applicants
Order office supplies
Prepare travel itineraries
Make hotel reservations
Make transportation reservations
Prepare employer's brief case for trips
Prepare agenda for meetings
Attend Court
Help plan and organize office
social affairs
Serve as Notary Public
Keep Daybook or Diary
Keep the legal justice docket
Keep a follow up or tickler file
List others not mentioned:

ORGANIZE AND USE FILES

General Correspondence
Clients' files
Employer's personal files

FILE BY THE FOLLOWING METHODS

	Regu- larly	Some- times	Never
Alphabetic	_____	_____	_____
Numeric	_____	_____	_____
Geographic	_____	_____	_____

KEEPING OFFICE FINANCIAL RECORDS

Keep checkbook	_____	_____	_____
Write checks	_____	_____	_____
Make deposits	_____	_____	_____
Reconcile bank statements	_____	_____	_____
Prepare office budget	_____	_____	_____
Prepare office payrolls	_____	_____	_____
Prepare quarterly income tax withholding & FICA reports	_____	_____	_____
Keep investment records	_____	_____	_____
Keep insurance records	_____	_____	_____
Keep travel expense records	_____	_____	_____
Keep expense records of cases	_____	_____	_____
Keep trust accounts	_____	_____	_____
Send statements to clients	_____	_____	_____
Maintain clients ledger	_____	_____	_____
Cash Journal	_____	_____	_____
Accounts Payable Ledger	_____	_____	_____
General Ledger	_____	_____	_____
Petty Cash Ledger	_____	_____	_____
Post to Ledgers	_____	_____	_____
Prepare financial statements:			
Trial Balance	_____	_____	_____
Income Statement	_____	_____	_____
Balance Sheet	_____	_____	_____
List others not mentioned:	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Is erasing permitted on legal documents? Yes ___ No ___ Limited ___

To what _____

Approximately at what speed do you take dictation? _____ wpm

Approximately at what speed do you do most of your typing _____ wpm

Is Shorthand a requirement for your position? Yes ___ No ___

Please rank in order of importance (1,2,3, etc.) the six traits you consider most essential in the legal secretary.

_____	Accuracy	_____	Dependability
_____	Courtesy	_____	Initiative
_____	Tact	_____	Attention to detail
_____	Foresight	_____	Patience
_____	Self Control	_____	Discreetness
_____	Loyalty	_____	Neatness
_____	Interest in work	_____	Ability to deal with
_____	Common Sense	_____	public pleasantly

When you began your career as a legal secretary, what special difficulties did you encounter which you feel specialized training in school might have prevented?

_____ Legal spelling
 _____ Legal punctuation
 _____ Shorthand forms for technical legal terms
 _____ Proper form for setting up legal documents
 _____ Insufficient shorthand speed
 _____ Insufficient typewriting speed
 _____ Insufficient accuracy on the typewriter
 _____ Pressure of work
 _____ Unfamiliarity with legal procedures, organization of courts,
 and the nature of trials
 _____ Confusing legal terms (due to similarity of sound or spelling)
 _____ Number of copies required for various legal documents
 _____ OTHERS:

Your name of your Chapter _____

Type of law firm:

General _____ Specialized _____ To What _____

ADDITIONAL COMMENTS:

APPENDIX B

TABULATION OF RESPONSES TO CHECK LISTS

TABULATION OF RESPONSES TO CHECK LISTS

	Regu- larly	Some- times	Never
<u>TAKING DICTATION</u>			
Take and transcribe shorthand notes	<u>31</u>	<u>57</u>	<u>28</u>
Take dictation directly to the typewriter	<u>9</u>	<u>48</u>	<u>56</u>
Take dictation from machine	<u>65</u>	<u>26</u>	<u>24</u>
Use the stenograph	<u>1</u>	<u>2</u>	<u>108</u>
Take the following types of dictation:			
letters	<u>85</u>	<u>26</u>	<u>4</u>
memos	<u>60</u>	<u>39</u>	<u>23</u>
reports	<u>28</u>	<u>40</u>	<u>39</u>
speeches	<u>8</u>	<u>35</u>	<u>64</u>
minutes of meetings	<u>19</u>	<u>46</u>	<u>47</u>
telephone conversations	<u>14</u>	<u>45</u>	<u>49</u>
legal documents in entirety:			
briefs	<u>45</u>	<u>33</u>	<u>32</u>
petition	<u>63</u>	<u>26</u>	<u>24</u>
answers	<u>59</u>	<u>28</u>	<u>26</u>
depositions	<u>10</u>	<u>14</u>	<u>84</u>
wills	<u>43</u>	<u>30</u>	<u>37</u>
abstracts	<u>24</u>	<u>22</u>	<u>64</u>
deeds	<u>36</u>	<u>40</u>	<u>35</u>
mortgages	<u>35</u>	<u>35</u>	<u>42</u>
leases	<u>34</u>	<u>39</u>	<u>35</u>
divorce cases	<u>49</u>	<u>23</u>	<u>41</u>
power of attorney	<u>25</u>	<u>51</u>	<u>36</u>
acknowledgment	<u>50</u>	<u>21</u>	<u>38</u>
proxy	<u>9</u>	<u>41</u>	<u>61</u>
affidavit	<u>52</u>	<u>34</u>	<u>28</u>
interrogatories	<u>38</u>	<u>31</u>	<u>42</u>
List others not mentioned:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

<u>TYPEWRITING</u>	Regu- larly	Some- times	Never
Use Manual Typewriter	0	2	102
Use Electric Typewriter	70	21	17
Use Executive Typewriter	21	17	72
Use Automatic Typewriter	43	18	46
Type the following:			
Letters, memos, reports, (Copying from previous)	74	33	7
(From longhand notes)	30	49	28
Stencils	0	11	98
Masters	12	18	79
Legal documents using previously prepared documents as guides:			
Petitions	74	35	5
Answers	71	30	10
Summons	73	27	15
Affidavits	77	31	6
Acknowledgements	78	25	9
Depositions	21	21	67
Verifications	71	22	18
Garnishments	42	35	37
Guardianships	43	33	31
Power of Attorney	46	46	22
Proxy	24	38	49
Wills	56	38	18
Abstracts	37	27	46
Deeds	59	33	20
Mortgages	54	31	26
Leases	49	38	23
By-Laws (Corporate)	52	32	29
Partnership Agreements	47	37	29
Contract for sale of real estate	47	40	18
Other Documents:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

<u>USING COMMUNICATION SERVICES</u>	Regu- larly	Some- times	Never
Operate switchboard	8	12	87
Answer the telephone	66	40	1
Take messages about calls and bring them to attention of employer	82	24	1
Route Callers	51	38	18
Keep Record of Telephone Calls	61	25	21
Place General Outgoing Calls	56	42	9
Make Long Distance Calls	62	41	5
Send Telegrams	3	31	73
<u>MEETING THE PUBLIC</u>			
Act as Receptionist	49	46	14
Screen Callers	54	39	15
Make Appointments	69	27	11
Help Entertain Visiting Clients or Business Associates	15	36	57
<u>COLLECTING INFORMATION, COMPOSING, EDITING</u>			
Assist with the preparation of legal documents:			
Gather information for/about cases (such as facts about clients, etc.,)	35	44	28
Sift and Organize Facts	31	42	33
Gather Material for Speeches	6	16	84
Make Digests of Articles, Letters, or Books	9	25	72
Compose Written Communication:			
from oral instructions	65	30	16
from form letters	47	38	20
from longhand notes	48	42	18
on own initiative	57	38	12
Other:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Legal documents (fill-ins):

	Regu- larly	Some- times	Never
Order to Show Cause	31	38	39
Affidavit	46	38	26
Acknowledgment	53	34	19
Verification	54	29	22
Summons	66	26	14
Subpoena	55	35	18
Petitions	44	26	35
Guardianships	22	39	42
Garnishments	32	30	38
Writs	23	39	47
Injunction	13	36	58
Power of Attorney	22	36	48
Proxy	12	36	60
Deeds	52	29	27
Mortgages	48	28	33
Contracts	31	33	40
Other Documents:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

OPERATING OTHER OFFICE MACHINES

Operate a mimeograph	5	7	90
Operate a fluid duplicator	14	7	81
Operate Off Set	1	5	97
Operate 10 key Adding Machine	37	42	24
Operate Printing Calculator	26	26	51
Other Machines:			
_____	_____	_____	_____
_____	_____	_____	_____

HANDLING THE MAIL

Open Incoming Mail	51	37	17
Accept Papers and Packages	67	31	8
Stamp Mail by Hand	60	18	23
Sort Mail	51	39	15
Sign for Registered Mail	47	37	20
Read Incoming Mail	62	32	10
Determine Amount for Postage	70	20	12
Annotate Letters	30	39	36

<u>PERFORMING GENERAL OFFICE DUTIES</u>	Regu- larly	Some- times	Never
Act as Librarian for office (law) library	23	37	36
Mark articles to be clipped	10	33	57
Keep a clipping file	17	25	60
Organize office routine	30	44	30
Arrange office layout	18	27	50
Plan or schedule each day's work	36	49	14
Delegate work	19	47	32
Supervise clerical employees	14	22	60
Screen applicants	22	12	64
Order office supplies	44	29	28
Prepare travel itineraries	19	35	47
Make hotel reservations	20	52	31
Make transportation reservations	20	52	31
Prepare employer's brief case for trips	12	38	52
Prepare agenda for meetings	9	37	56
Attend Court	11	29	59
Help plan and organize office and social affairs	11	41	47
Keep confidential personal records for employer	46	33	24
Serve as Notary Public	83	8	13
Keep Daybook or Diary	66	16	22
Keep the legal justice docket	43	18	39
Keep a follow up or tickler file	55	22	21
List others not mentioned:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

ORGANIZE AND USE FILES

General Correspondence	83	9	3
Client's files	89	5	6
Employer's personal files	69	19	12

FILE BY THE FOLLOWING METHODS

Alphabetic	81	12	10
Numeric	62	13	21
Geographic	10	1	84

KEEPING OFFICE FINANCIAL RECORDS

	Regu- larly	Some- times	Never
Keep checkbook	37	16	45
Write Checks	43	27	27
Make deposits	43	24	33
Reconcile bank statements	30	12	61
Prepare office budget	5	11	83
Prepare office payrolls	30	10	60
Prepare quarterly income tax withholding and FICA reports	25	5	71
Keep investment records	10	9	80
Keep insurance records	18	10	71
Keep travel expense records	26	19	57
Keep expense records of cases	37	20	44
Keep trust accounts	36	12	52
Send statements to clients	56	22	22
Maintain clients ledger	42	12	45
Cash Journal	27	9	64
Accounts Payable Ledger	27	10	64
General Ledger	24	8	68
Petty Cash Ledger	20	11	67
Post to Ledger	28	10	58
Prepare financial statements:			
Trial Balance	8	7	82
Income Statement	11	7	79
Balance Sheet	11	8	79
List others not mentioned:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Is erasing permitted on legal documents? Yes 68 No 15

Limited 32 To What _____

Approximately at what speed do you take dictation? _____ wpm

$\frac{80}{18}$ $\frac{90}{12}$ $\frac{100}{15}$ $\frac{110}{6}$

Approximately at what speed do you do most of your typing?

$\frac{60}{21}$ $\frac{70}{27}$ $\frac{80}{15}$ $\frac{90}{17}$ word per minute

Is shorthand a requirement for your position? Yes 35 No 57

Please rank in order of importance (1,2,3, etc.,) the six traits you consider most essential in the legal secretary.

<u>1</u> Accuracy	<u>2</u> Dependability
<u> </u> Courtesy	<u>3</u> Initiative
<u> </u> Tact	<u>4</u> Attention to detail
<u> </u> Foresight	<u> </u> Patience
<u> </u> Self Control	<u> </u> Discreetness
<u>5</u> Loyalty	<u> </u> Neatness
<u> </u> Interest in work	<u> </u> Ability to deal with public
<u>6</u> Common sense	

When you began your career as a legal secretary, what special difficulties did you encounter which you feel specialized training in school might have prevented?

3 Legal Spelling
5 Legal punctuation
6 Shorthand forms for technical legal terms
4 Proper form for setting up legal documents
 _____ Insufficient shorthand speed
 _____ Insufficient typewriting speed
 _____ Insufficient accuracy on the typewriter
 _____ Pressure of work
1 Unfamiliarity with legal procedures, organization of courts, and the nature of trials
2 Confusing legal terms (due to similarity of sound or spelling)
 _____ Number of copies required for various legal documents
 _____ OTHERS:

Your Name of your Chapter _____

APPENDIX C

CORRESPONDENCE

August 10, 1979

Dear Legal Secretary:

Would you spend a few minutes of your time to supply me with some information which will be of great value to me in writing my master's thesis required for graduation from Oklahoma State University?

Not only will the information supplied be of value to me in writing my thesis, but as an instructor in Legal Secretarial Science at Oklahoma State University School of Technical Training, Okmulgee, it will help me set priorities in training future legal secretaries for the State of Oklahoma.

I have tried to make the form as easy as possible for you to complete. Please place a check mark in the appropriate blank according to the frequency each of these duties are performed by you. Any comments that you care to make will be appreciated. I might add that I am a member of the Muskogee County Legal Secretaries Chapter and sponsor a very active Association of Legal Students Chapter at our college.

I shall appreciate your returning the check list as soon as possible. An addressed, stamped envelope is enclosed for your convenience. If you have any questions, please call me at 918-756-6211, Ext. 263.

Sincerely yours,

Robert Leckie
Legal Secretarial Instructor

Enclosures

September 15, 1979

Ms. _____
President, _____ County Legal
Secretaries Association

Dear Ms. _____ :

Approximately one month ago, I mailed to you copies of a check list of duties performed by legal secretaries for you to distribute to secretaries in your area. This information is to be used by me to prepare statistics for my master's thesis.

The response has been terrific, but I am making an effort to get as many check lists returned as possible. If you could remind the ladies at your next meeting to complete and return the check list, I would appreciate it very much.

Please extend to them my appreciation for their cooperation.

Very truly yours,

Robert Leckie
Legal Secretarial Instructor

VITA

Robert Leckie, Jr.

Candidate for the Degree of

Master of Science

Thesis: TASKS OF LEGAL SECRETARIES IN THE STATE OF OKLAHOMA

Major Field: Occupational and Adult Education

Biographical:

Personal Data: Born in Statesville, North Carolina, November 25, 1926, the son of Mr. and Mrs. Robert Leckie.

Education: Graduated from high school in Cleveland, North Carolina, in 1943; graduated from Salisbury Business College, Salisbury, North Carolina, in 1945 with a certificate in Secretarial Science; received an Associate of Science Degree from Tulsa Junior College, Tulsa, Oklahoma, December 1971; completed requirements for a Bachelor of Music degree from Musical Arts Conservatory of West Texas, Amarillo, Texas, June 1973.

Professional Experience: Terminal Manager and Travel Agent, Trailways Bus Systems, Washington, D. C. and Dallas, Texas, 1945-1955; Administrative Assistant to Jay Taylor (rancher, banker, oil man), Amarillo, Texas, 1955-1965; 1965-present, Business Education Instructor, Oklahoma State University School of Technical Training, Okmulgee, Oklahoma; author of several articles for Legal Secretaries publications.

Professional Affiliations: Member, Oklahoma Technical Society; HEACO; Oklahoma Business Education Association; National Association of Legal Secretaries.