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Level 2 Certificate for Legal Secretaries
Proof-reading Test Answers

CONFIDENTIALITY IN THE LEGAL OFFICE **Question Mark Not Needed**

Confidentiality is of the **utmost** importance in a legal office and the reputation of each **Solicitor's** business is crucial for **its** success.

When you start work you are likely to be asked to sign a Confidentiality Statement. What does this **mean?** It means you **are agreeing** not to discuss any case that you are involved in with family and **friends**. This would **also** include that you must not pass on any written information regarding your clients.

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If you work in a local Solicitor's office it is more than likely you will conduct **business** for someone you **know** at some point in your career and they would not take kindly to you discussing **their** business outside the office. This would be seen as acting very **unprofessional**.

Most local Solicitors probably operate in the following law areas where there will be confidential and sensitive information such as:

- 1) Probate – how much **someone** is worth after they **die** – or how much a beneficiary will inherit, information on **shares** and their value and how much is in **someone's** bank account.
- 2) **Family** – divorce or adultery. The **divorce** can be amicable or could be the opposite and become an acrimonious settlement.
- (3)** Conveyancing – details of **buying,** selling or **mortgage** arrangements. This will also include details of buyers' and sellers' finances, what they earn, and what they have in their savings.
- (4)** Criminal – anyone who has **committed** a criminal offence, has a **criminal** record, or it may be concerning criminal injury.

Information should not be **'gossiped'** about in the office with other staff and certainly not **discussed** in front of other clients. You never know, they may be a friend of the person you are discussing.

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Confidential **information** does not just cover 'gossiping'; it also covers written information. You may see **confidential** **files**, e-mails, or documents in files. You should not leave the files you are working on unattended to visit another office or 'put the kettle' on. If you have to leave your desk, lock the **file** away in the filing cabinet so you know it is secure. Turn your computer screen **off** or minimise the file if someone approaches you so that they **cannot** see what you are working on.

If you **have** to make a confidential telephone call, use an empty office so that you are not overheard. If that is not possible, make the call during the lunch **hour** when there are not so many people in the office to **overhear** your **conversation.**

Do not discuss or give out confidential information **to** any caller to the office or an unauthorised person on the **telephone**. If you are in doubt make a future **appointment** for the caller to come back, and say to the person on the telephone, you will call them back. This gives you time to **check** with your supervisor first that they are **authorised** to receive the **information.**

What would happen if you **leaked** confidential information? Depending on the severity, you would be severely reprimanded or even dismissed and **unlikely** to get a job in a legal office again.

Your Fee **Earned** could have a civil action taken against him/her by the **client** and could be 'struck off' by the Law Society. This means the Solicitor would not be able to **practise** law again.

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