# Template plan: Remote supervision of Supervised Legal Practice

# To be used in in situations where a supervisor and supervisee are employed by a different law practice/entity

### Details of supervisor

Name:

Law Practice/Entity:

Admission date:

Experience relevant to Supervisee’s role:

### Details of supervisee

Name:

Law Practice/Entity:

Admission date:

Role (including areas of law):

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| **The logistics of contact, how regular one-on-one meetings will be conducted and how the supervisor can be contacted by the supervisee at all other times** | *Examples:*  *-Daily scheduled meeting on (secure video platform/telephone call)*  *-Email; supervisor to let supervisor know when they are available to be contacted;*  *-messaging through practice management system* |
| **How the supervisor will manage the supervisee’s workflow** | *Examples:*  *-Supervisor will delegate work to supervisee based on work-load and complexity*  *- Supervisor will review workflow and work allocation at [regular interval]* |
| **How the correspondence and advice will be reviewed and feedback provided to the supervisee as well as the frequency of such review and feedback** | * *The supervisor will have direct access to all electronic files maintained by the supervisee enabling review of work and feedback* * *The supervisor will note comments on documents either track changes or provide feedback by email* * *Frequent [video/telephone] conferences to enable the giving of feedback and discussion on any mistakes and errors in supervisee’s work.* |
| **How the supervisor will access files and documents necessary for the supervisor to review all legal work performed by the supervised lawyer. Issues of client confidentiality must be carefully considered** | *Examples:*  *-Supervisor has direct access to supervisee’s files and documents through [practice management system]*  *- All documents prepared by the supervisee, including emails, file notes and diary notes, must be maintained through practice management system;*  *- Supervisor to be present in all video-conference meetings with clients unless otherwise agreed and appropriate;*  *- Confidentiality to be maintained through [cloud based system; controlled and limited use of email; use of secure document portals rather than email to share documents with clients and others; etc]* |
| **The Supervisor’s obligations:** | * Provide regular scheduled meetings to guide, correct and mentor the supervisee in their work but to also allow for and facilitate for informal interactions and opportunities to check issues where the supervisee is unsure of what to do; * make it easy and safe for the supervisee to disclose mistakes; * ensure that the supervisee has access to the resources, precedents and research tools required to do their work appropriately; * ensure appropriate information security procedures and technology, and provide appropriate training for the supervisee; * provide support and mentoring for the supervisee, including opportunities to interact with and learn from other staff; * discuss regularly with the supervisee issues such as ethics, client care and case matter management. |
| The Supervisee’s obligations: | * Follow the reasonable directions of the supervisor in conducting the work, including accepting corrections and guidance; * undertake such education, including CPD, as may be required to grow in competence as a lawyer; * keep a record of work done, reflecting on what you have learned; * let the supervisor know if you are unsure how to proceed with a task or matter or have made a mistake. |