

Saskatchewan CPLD Bar Admissions Program

PROGRAM HANDBOOK



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Saskatchewan CPLED Bar Admissions Program



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Helpful Links

CPLED Modules*
<https://cpled.desire2learn.com/>

Student Wiki*
<https://www.lawsocietycpled.pbworks.com/n/dashboard>

Law Society of Saskatchewan Rules
<https://www.lawsociety.sk.ca/lawyer-regulation/law-society-rules/>

Law Society of Saskatchewan Forms
<https://www.lawsociety.sk.ca/lawyer-regulation/law-society-forms/>

Professional Code of Conduct
<https://www.lawsociety.sk.ca/lawyer-regulation/code-of-professional-conduct/>

** Students receive access information one week prior to the first CPLED module*

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Introduction

The Program Handbook is the source for the rules, administrative policies and requirements set by the Law Society of Saskatchewan (“Law Society”) for students in the Saskatchewan CPLD Bar Admissions Program (the “CPLD Program” or “Program”). The information in this Handbook is intended to supplement *The Legal Profession Act* and the *Rules of the Law Society of Saskatchewan*. It is not intended to override the rules, policies, or procedures of the Law Society. To the extent that either of the Act or Rules deviate from the information in this Handbook, those sources govern.

Please read this Handbook carefully and retain it as a reference throughout the Program. This Handbook, and the rules, policies and procedures referred to in it, may be changed or updated from time to time. The current version of this Handbook is the version posted at: <https://www.lawsociety.sk.ca/for-lawyers-and-students/becoming-a-lawyer-in-saskatchewan/students/cpled-bar-admission/cpled-bar-admission-important-documents/>

Applying to the Saskatchewan CPLD Program

For admission to the CPLD Program, prospective students must:

1. Submit an Application for Admission as a Student-at-Law and receive approval of admission.
2. Submit the CPLD Registration form with payment by the registration deadline.

Student-at-law status

The Law Society administers the rules, regulations and procedures for students-at-law and principals. Persons who want to article in Saskatchewan must apply to be admitted as a student-at-law by the Law Society. This is separate from the requirement to register for the CPLD Program.

While there is no specific deadline for applying to attain student-at-law status, students must be a student-at-law in order to file an Articling Agreement, and to begin the CPLD Program; and

though applicants can submit a CPLED Registration form prior to being admitted as a student-at-law, CPLED Registration is not complete until the applicant has student-at-law status.

For further information, please review: [Applying for Admission as a Student-at-Law](#).

Articling position

The CPLED Program is designed to work in conjunction with the student's articling experience. ***Therefore, all students must obtain an articling position in order to successfully complete the CPLED Program.***

Before beginning an articling position, three forms must be submitted and approved:

1. Application for Admission as a Student-at-Law (Form A-1)*
2. Application to Act as Principal (Form A-17)†
3. Articling Agreement (Form A-2)*

For further information, please review: [Articling in Saskatchewan](#)

While most students will have obtained an articling position prior to commencing the CPLED Program, the Law Society recognizes that some students will still be seeking a position when the CPLED Program begins. Since the CPLED Program only runs once a year, the Law Society will allow students to commence the Program without an articling position. However, ***students must obtain a position prior to their sixth module or they are required to withdraw from the Program.***

Notwithstanding the foregoing, it is highly recommended that students have an articling position before beginning the Program. The CPLED Program is challenging and even more so when a student does not have the resources and support that an articling position provides. Further, as the CPLED Program undergoes redevelopment from time to time in order to keep pace with evolving legal competencies, program and governance requirements and changing demographics, it cannot be guaranteed that modules offered in one program year will continue to be offered. Thus, students who suspend their CPLED studies due to lack of articles and return to the Program after a lapse of time may not receive credit for all modules previously completed or may be required to complete additional modules encompassing new content.

* The fee for the Application for Admission as a Student-at-Law is \$183.75 (\$175 + GST), as is the fee for the Articling Agreement. There are two separate fees of \$183.75 (\$175 + GST) each.

† The Application to Act as Principal as no fee. Please note it must be completed for anyone acting as a principal during a secondment.

Currently, students who begin the CPLED Program without articles are required to submit the *Notice of Possible Risks of Enrolling in CPLED* which is posted on the Law Society website under [CPLED Important Documents](#).

Saskatchewan CPLED Program

Your contact information

During the CPLED Program, *students must provide and maintain a current address, phone number and email address* as part of their CPLED file. All changes (including name changes) must be made in writing and can be mailed, faxed or emailed to the Bar Admissions Officer. See the “Contact” section at the beginning of this Handbook for relevant contact details.

It is particularly important to ensure that your email address is current since email is the primary mode of communication within the Program. Students that will be completing a secondment and will be unable to access their primary email address, must provide a secondary email address to be used during that time.

Program requirements

Each student who participates in the CPLED Program must:

- attend all face to face sessions and participate fully in all online portions of the Program;
- submit on time and successfully complete all competency evaluations and assignments with professional and academic integrity;
- receive a grade of “competency demonstrated” in all mandatory assignments, competency evaluations and examinations; and
- comply with this Handbook and any additional administrative policies set from time to time by the Law Society.

During the CPLED Program students must take responsibility for their own learning. Students take “ownership” of their own performance in the Program by:

- reading and understanding the policies and requirements contained within this Handbook;
- effectively managing their time, including balancing work required by CPLED with the demands placed upon them by their employer and their personal life;
- seeking help when needed; and
- learning to use the various resources provided by CPLED.

Students must be prepared to learn independently and seek solutions from a variety of sources. The CPLED Modules do not necessarily review law that would be covered in law school; students are responsible to research and understand the current state of the law.

Program Components

The CPLED Program requires completion of three face-to-face modules, six online modules, an online self-study course and a recorded webinar. Students are expected to complete all requirements within one CPLED year.

| Face-to-Face Modules | Online Modules | Other Requirements |
|---------------------------|--|---------------------------------|
| Interviewing and Advising | Legal Research and Writing | Indigenous Canada Online Course |
| Oral Advocacy | Drafting Contracts | Trust Accounting |
| Negotiation | Written Advice & Advocacy | |
| | Drafting Pleadings | |
| | Client Relationship Management | |
| | Practice Management / Ethics & Professionalism | |

For further information, please review: [2018-19 CPLED Module Schedule](#)

Face-to-Face Modules

Face-to-face modules are taught and evaluated in-person. Instruction and learning exercises within these modules assist in preparing students for their face-to-face competency evaluations.

Students will attend class each day, generally from 8:30 a.m. to 4:30 p.m., Monday to Friday.

Facilitators and evaluators

Facilitators and evaluators include experienced, highly-respected members of the legal community. These individuals volunteer to deliver course materials, lead in-person sessions (including discussions and learning exercises), and evaluate student performance. All facilitators and evaluators are trained on the same set of assessment criteria. They use their practical experience and CPLED training to develop and evaluate student competencies.

Requirements and expectations

In addition to the general expectation that students conduct themselves with professional and academic integrity, the following are expectations of students at the face-to-face:

- **Mandatory Attendance.** Students should plan to be away from work for the entire day noted on the schedule. Some days are scheduled to finish earlier than others; students

can use this time away from the office as additional time to prepare for their competency evaluations. Students are expected to sign in daily.

- **Punctuality.** Students are expected to arrive on time each day. It is unprofessional to keep other students, instructors or presenters waiting or to disrupt a lecture or class by arriving late. Late arrival for a competency evaluation could result in a student having less time to demonstrate the competency in question or being awarded a grade of “competency not yet demonstrated”.
- **Respectful, Professional Behaviour.** This includes being prepared to participate. It also includes full attention. Students are expected to complete all background readings and learning exercises. Students are expected to turn off phones and other devices unless they are used to access instructional content.
- **Appropriate Attire.** Students are expected to wear business attire. Students will be in daily contact with Justices, Judges, practitioners and Law Society staff. Students’ conduct must, at all times, reflect the professionalism, civility and courtesy that is required in the legal profession.

Involvement in other work, regardless of its nature, is not an adequate reason for non-attendance, failure to participate, or failure to satisfactorily complete CPLED Program requirements. Students should not schedule work meetings, court appearances, or other work-related activities during this time and should not expect to be granted an excused absence for these types of matters.

Similarly, students should not schedule personal appointments during face-to-face sessions.

Disruptive behaviour, non-attendance or failure to complete CPLED Program requirements can result in suspension from the Program unless the CPLED Program Director is satisfied there is an adequate reason for such conduct.

Online Modules

The majority of the CPLED Program is delivered and evaluated online. When students log in to the online platform, they enter the office of “CPLED LLP”, a virtual pseudo-law firm environment. Background readings, learning exercises, and assignments within these online modules help prepare students for their mandatory competency evaluations.

Students will be participating in online modules while articling in their firms. It is each student’s responsibility to discuss his or her schedule with his or her principal to ensure that the student has time during the firm’s regular office hours to participate in the online modules.

Learning management platform

Online modules and other program information are delivered through a learning management platform known as Desire2Learn (D2L). The CPLED D2L platform can be accessed at <https://cpled.desire2learn.com>.

Students receive their unique login names and passwords by email. D2L facilitates content sharing, communication, and submissions. Students must retain their User Name and Password throughout the Program and must *keep their User Name and Password confidential*.

Note: The Submission Protocol (Appendix 1) requires that students use their assigned password when submitting all competency evaluations.

Any student who encounters difficulties logging onto the online modules or loses her or his user name or password should contact the Bar Admissions Officer.

Neither the Law Society nor CPLED is responsible for difficulties that students may encounter with the online modules due to inadequate technical resources. Students are expected to complete the System Check provided on D2L to identify any possible conflicts.

Content

Through D2L, students receive module instructions, assessment criteria, background readings, learning exercises, formative assignments, and competency evaluations. Students can also access information about the CPLED Program, information about D2L tools, and various online resources.

Dropbox and quiz tools

For most online modules, students use an application in D2L known as the “Dropbox” to submit assignments and competency evaluations. If students submit more than one document to the Dropbox, the last document submitted at the time of the deadline is the one that is assessed or evaluated. **The Dropbox closes at 2:00 pm on the deadline.**

Learning group facilitators also use the Dropbox to return formative assignments with embedded feedback.

For modules with exam-like assignments and competency evaluations, students use the “Quizzes” application in D2L. **Accessibility to “quizzes” also ends promptly at 2:00 pm on the specified deadline.**

Facilitators and evaluators

Students are divided into learning groups of up to twenty students per group. Each learning group is assigned an online Learning Group Facilitator (LGF). The LGFs are experienced Saskatchewan lawyers who are knowledgeable in the practice area related to the module. The LGFs guide students by giving them feedback on formative assignments and helping them acquire the competencies they need to be successful. LGFs interact with students in their learning group by responding to student inquiries and reviewing student assignments.

The final assignment in each Module is the competency evaluation. Competency evaluations are graded by an individual evaluator (not by the LGFs) in order to ensure consistency in marking. ***Competency evaluations form the licensing component of the Program and competency must be demonstrated on all competency evaluations in order for students to successfully complete the Bar Admissions Program.***

Requirements and expectations

Although each online module is different in form and content, they tend to follow the same pattern of steps and information. Online modules typically include the following basic components:

- **Module introduction.** The introduction to each module outlines the particulars of the module substance and objectives, as well as the assignment structure for the module and any specific requirements such as word or page count.
- **Assessment criteria.** The assessment criteria outline the specific competencies (knowledge, skills, and tasks) to be assessed in the module, as well as performance indicators for each competency. The performance indicators identify factors to be considered in assessing each competency.
- **Background readings.** Each module identifies background readings and other resources to help students develop competencies related to the assessment criteria for the module. Students are not limited to using these materials. In some units, students may find they need to do additional research, while in others, they may find that the materials identified cover the information needed.
- **Learning exercises.** Each module includes learning exercises to help students further develop module-specific competencies. These learning exercises are typically “hands on,” consisting of questions for students to answer or activities to complete. Students get answers or suggestions on how to complete the exercises; these guide students as they self-check their own competency development. In some cases, the learning exercises are “reflective,” instructing students to review something they have already done or seen.

- **Units.** Other than Practice Management/Ethics & Professionalism, each online module consists of two units. Unit 1 is the formative assignment; Unit 2 is the competency evaluation. In some cases, the units are presented in the form of a “client file memo” outlining a hypothetical client fact situation and instructions from a “CPLED LLP” lawyer. In other cases, the units are presented in an exam-like set of multiple choice and constructed response questions.
 - **“Client File” Assignments,** which are similar to the mandatory competency evaluation for the module, are designed to build towards the competency evaluation. Students receive feedback from their module learning group facilitator. Assignments are due before 2:00 pm CST/MST on the deadline. Students can expect to receive feedback approximately one week after the submission deadline. Students should review and incorporate suggestions from feedback in their Competency Evaluation. Students are free to discuss their feedback with their LGF.
 - **“Exam-Like” Assignments.** For assignments which have an exam-like structure (e.g., Practice Management and Client Relationship Management), students will receive feedback automatically within the D2L “Quizzes” application when the assignment is submitted. Students should review that feedback in preparation for their Competency Evaluation. Students may contact the CPLED Program Director with questions about feedback.
 - **Competency evaluations.** The final unit of each online module is the “competency evaluation”. This unit is confidential. The submission is assessed on the basis of the assessment criteria. Competency evaluations are due before 2:00 pm CST/MST on the deadline. *Competency evaluations are summative evaluations measuring attainment of a competency threshold; they are not development exercises. Students do not receive feedback on competency evaluations.* Note: For competency evaluations that use an exam-like structure (e.g., Practice Management and Client Relationship Management) within the D2L “Quizzes” application, students must be supervised by an approved invigilator (i.e., a member in good standing of the Law Society or a judge). Detailed information is provided to students in advance of any module with this requirement.

- **Submission protocol.** All submitted assignments and competency evaluations for the online modules must adhere to a standardized formatting, saving, and file naming system known as a “Submission Protocol.” The Submission Protocol can be found on D2L and is included for reference as Appendix 1.
- **Late submissions.** It is mandatory that students submit all assignments and competency evaluations by the time and date specified. Students will not be able to submit assignments or competency evaluations online after the submission deadline as access to the Dropbox closes immediately after the deadline. **All late submissions must have prior approval (even if computer problems are the issue) from the CPLED Program Director. A student who submits a late assignment or late competency evaluation without prior approval must notify the CPLED Program Director, by email, stating the reason that the submission was late and requesting permission for it to be accepted.**
 - **Late assignments.** In event of a late assignment, the student’s LGF will be notified by the Bar Admissions Officer. If the reason for late submission is acceptable to the CPLED Program Director, the submission will be reviewed by the LGF. If the reason given is insufficient, the student will receive a standing of "Competency Not Yet Demonstrated" and the student will be required to complete the module, both the assignment and the competency evaluation, in the Supplemental period.
 - **Late competency evaluations.** Should a competency evaluation be submitted late and the reason for late submission is acceptable to the CPLED Program Director, the submission will be evaluated by the Competency Evaluator. If the reason given is insufficient, the student will receive a standing of “Competency Not Yet Demonstrated” and the student will be required to complete a supplemental competency evaluation in the supplemental period.

In cases in which late assignments or late competency evaluations are accepted, students may be required to sign a statutory declaration verifying their circumstances and certifying that they are submitting their own original work.

Indigenous Canada Course

In 2015 the Truth and Reconciliation Commission of Canada released its Calls to Action, geared to redress the legacy of residential schools and advance the process of Canadian reconciliation. Call to Action 27 is specific to the legal community.

“We call upon the Federation of Law Societies of Canada to ensure that lawyers receive appropriate cultural competency training, which includes the history and legacy of

residential schools, the *United Nations Declaration on the Rights of Indigenous Peoples*, Treaties and Aboriginal rights, Indigenous law, and Aboriginal Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.”^[1]

CPLED, in its response to Call to Action 27, **requires all students** to complete the University of Alberta’s Indigenous Canada on-line course. The course consists of twelve modules that examine the historical and contemporary lives, identities, cultural expressions, rights, and goals of Indigenous peoples in Canada. These modules provide a basic familiarity with Indigenous perspectives as well as Indigenous/non-Indigenous relations.

- **Enrolment and certificate of completion.** To enrol, students log on to the Coursera website and choose the free option. When the students complete the course, they will receive an email from Coursera confirming completion. To avoid delaying their bar admission, **students should forward this email to the Bar Admissions Officer no later than April 5, 2019.** When course completion is received and verified, a student will have achieved competency for this element of the Program.
- **Time Frame.** The Coursera website suggests that the course could take 3 to 5 hours per week for 12 weeks to complete. While some students may take that long to complete the course, it can be completed in less time. Additionally, it is possible to complete part of the course, take a break, and then return to complete the remainder a few weeks later. As completion of the course will take time, it is strongly recommended that the summer months are used to complete the course.

Trust Accounting Webinar

This component of the CPLED Program was formerly a presentation given during the second face-to-face module. It is now offered as a recorded webinar, which will become available to students in the fall and can then be viewed at any time during the remaining CPLED Program year. Students will complete and submit the to the Bar Admissions Officer a declaration attesting to their completion of the Trust Accounting Webinar. This affidavit will be provided to students at Module 9.

^[1] http://www.trc.ca/websites/trcinstitution/File/2015/Findings/Calls_to_Action_English2.pdf

Demonstrating Competency

As members of the legal profession, lawyers are held to a high standard. The public trusts that lawyers not only know the law, but also have the practical knowledge, skills and experience to help them work through their legal issues. The CPLED Program uses a competency-based evaluation system to ensure that those who are admitted to practice can meet this expectation.

Competency-based approach

A competency-based approach to evaluation stresses the ability to demonstrate required competencies, rather than the ability to achieve a particular grade on an exam or meet certain target hours of work. CPLED students are assessed and evaluated based on a competency profile for entry-level practitioners. CPLED uses the National Entry to Practice Competency Profile for Lawyers and Quebec Notaries, approved by the Council of the Federation of Law Societies of Canada. Guided by consultants specializing in credentialing, the competency profile was developed with the assistance of law society leaders and senior staff and practitioners from across the country. It was validated through a large-scale national survey of members of the profession to ensure it accurately reflects the knowledge, skills, and abilities required for new lawyers to practice competently.

A copy of the National Competency Profile is included as Appendix 7.

Competency evaluations

During the CPLED Program, students complete ten competency evaluations, each of which covers various competencies set out in the National Competency Profile:

| | |
|----------------------------|--------------------------------|
| Interviewing and Advising | Drafting Pleadings |
| Legal Research and Writing | Client Relationship Management |
| Drafting Contracts | Practice Management |
| Oral Advocacy | Ethics & Professionalism |
| Written Advice & Advocacy | Negotiation |

While the competency evaluations require that students perform certain tasks, and necessitate some basic underlying knowledge, the competency evaluations are used to evaluate the following critical skills:

- oral and written communication skills,
- research and analytical skills
- client relationship management skills,
- practice management skills, and
- ethics and professionalism skills.

Assessment criteria

Students are provided with the assessment criteria at the start of each module. The assessment criteria are used by several people:

- by students to self-assess their own work,
- by facilitators to guide them in providing effective feedback, and
- by evaluators to determine whether a student demonstrates competency on a competency evaluation.

The assessment criteria outline the specific competencies (knowledge, skills, and tasks) to be assessed, as well as performance indicators for each competency. The performance indicators identify factors to be considered in assessing each competency. The marking rubric evaluates each competency on a scale of 0 to 5 with a 3 indicating 'entry-level demonstration of the knowledge, skill, or ability.

Possible grades

For assignments and competency evaluations, the possible grades are:

- **Competency Demonstrated (CD)** – assigned to a student who has satisfied the Assessment Criteria and demonstrated competency.
- **Competency Not Yet Demonstrated (CNYD)** – assigned to a student who has not demonstrated the minimum acceptable level of competency. Students assigned a grade of CNYD will be entitled to write a supplemental assignment or competency evaluation.
- **Deferred** – assigned at the discretion of the CPLED Program Director in circumstances where a student has reasonable grounds for requiring a deferral.
- **Incomplete** – assigned at the discretion of the CPLED Program Director in circumstances where a student has failed to submit an assignment or competency evaluation by the specified deadline without an acceptable reason for such failure. Students assigned a grade of Incomplete will be entitled to write a supplemental assignment or competency evaluation.
- **Failure** – assigned at the discretion of the CPLED Program Director as an academic sanction for breach of the Professional Integrity Policy or for any other breach of academic or professional integrity. Students who are assigned this grade on a competency evaluation will not be entitled to write a supplemental competency evaluation.

Grades and feedback for assignments

LGFs review assignments and return them to students with feedback via the Dropbox. Assignments are designed to build toward the competency evaluation. As such, students are advised to think critically about the feedback provided and apply it in future assignments and competency evaluations. Students are further advised to use the assessment criteria to self-assess performance on assignments in preparation.

If a grade of CNYD is given, a student will be required to redo the assignment (or portions thereof) during the module. If a student fails to resubmit or receives a CNYD due to a late submission, he or she will be required to complete a supplemental module, both the assignment and the competency evaluation, during the supplemental period following Module 9.

Grades and feedback for competency evaluations

Students who receive a CD grade do not receive a copy of their marking sheet nor do they receive any other feedback on their Competency Evaluation. Competency evaluations are summative evaluations measuring attainment of a competency threshold; competency evaluations are not development exercises.

If a student's competency evaluation is graded CNYD the student will not have the ability to resubmit. Subject to receiving a CD on a re-read, the student will be required to complete a supplemental competency evaluation.

Students who receive a grade of CNYD receive a copy of their individual marking sheet via email. **The marking sheet is the only feedback students receive on CNYD CEs.** Provision of the marking sheet is intended to help students identify specific areas of concern, so they can determine whether they wish to request a re-read and so that they can better prepare for their supplemental competency evaluation.

The Bar Admissions Office will post the results of the competency evaluations on the D2L website. Every effort will be made to post these results within thirty days of the completion of the module.

Re-reads

If a student receives a grade of CNYD on a competency evaluation, the student is entitled to request a paid re-read.

Application, in writing, for a paid re-read is to be sent to the Bar Admissions Officer, accompanied by payment of a non-refundable re-read fee for each competency evaluation to be re-read. The

fee for each re-read is \$100 plus GST (\$5.00) and is payable to The Law Society of Saskatchewan – Bar Admissions Office.

Application for a paid re-read must be made in writing and received by The Bar Admissions Office *within 10 business days of the date the grade is issued.*

A re-read is not available for submissions deemed CNYD as the result of late submission.

Supplemental competency evaluations

If a student has received a grade of CNYD on a competency evaluation, the student will be entitled to complete a supplemental competency evaluation at a designated time, upon payment of the required fee, and subject to the limitations in Rule 159(3). A student may complete a maximum of three supplemental competency evaluations. If a student ultimately receives a grade of CNYD in more than three competency evaluations, that student is required to repeat the entire CPLED Program. A student will not be eligible to attempt any supplemental competency evaluations until he or she has attempted all of the competency evaluations required in the Program.

The fee for each supplemental competency evaluation is \$100 plus GST (\$5.00) and is payable to The Law Society of Saskatchewan – Bar Admissions Office.

Students who receive a grade of CNYD on a supplemental competency evaluation may request a re-read in the same manner and time-frame as provided for competency evaluations. See “Re-Reads”.

If, after re-read of a supplemental competency evaluation a student still has a grade of CNYD, the student must return to the CPLED Program the following year to repeat the module(s) in which he or she was unsuccessful. See “Repeating the CPLED Program.” If a student is required to repeat the entire program, the student may apply for a waiver of that requirement. See “Rule Waiver.”

Note: Many students receive one or more CNYDs throughout the course of the CPLED Program. Many students can expect to complete supplemental competency evaluations or missed modules during the supplemental period (April – May). Students should bear this in mind when scheduling bar calls or vacations.

While grades of CNYD are not uncommon, receiving a grade of CNYD can be a distressing occurrence for some students. Students experiencing anxiety are encouraged to contact Lawyers Concerned for Lawyers for help.

<http://lawyersconcernedforlawyers.ca/>

Completing the CPLED Program

As stated previously, students participating in the CPLED Program must conduct themselves with professional and academic integrity. Successful completion requires full-time attendance at, and participation in, all parts of the CPLED Program. The Law Society is notified if a student fails to conduct themselves with professional and academic integrity or if he or she fails to meet the requirement of full-time attendance and participation.

In addition, the CPLED Program requires a grade of “competency demonstrated” (CD) in each of the 10 competency evaluations (after all permitted supplemental and deferred competency evaluations).

Students are expected to complete all requirements within one CPLED year.

Final results

Students’ final CPLED Program results will be sent to them within thirty days after fulfillment of all Program requirements. The Law Society will disclose a student’s final standing to each student’s principal as well.

Repeating the CPLED Program (in whole or in part)

Under the *Rules of the Law Society of Saskatchewan*, a student has only one supplemental attempt per competency evaluation and a maximum of three supplemental attempts for all competency evaluations combined.

- If a student receives a grade of "Competency Not Yet Demonstrated" in more than three competency evaluations, that student is required to repeat the entire Program.
- If a student receives a grade of “Failure” on a competency evaluation, that student is required to repeat the entire Program.
- If a student receives a grade of "Competency Not Yet Demonstrated" on one or more supplemental competency evaluations (up to a maximum of three), that student must return to the Program the following year to repeat the module(s) in which he or she was unsuccessful.

In each case, this constitutes a second attempt at the Program. The Rules do not permit more than two attempts at the Program.

A student may apply for a waiver of the requirement to repeat the Program. See “Rule Waiver.”

Rule Waiver

Students who are required to repeat the Program may apply in writing to the Admissions and Education Committee of the Law Society within 30 days of issuance of results, for a review. The Committee may, in its discretion, make a decision on a review of the record, make any enquiry and investigation considered necessary, or conduct a Hearing.

Policies

Clear policies and consistent application of policies help to maintain the integrity of the assessment and evaluation process, and to ensure a level playing field for all students. Students should familiarize themselves with these policies.

Program Agreement

To be admitted to the CPLED Program, an applicant must first agree to certain terms and conditions as set out in the CPLED Program Agreement. The CPLED Program Agreement includes, among other things, provisions dealing with collaboration, original work, and plagiarism.

Students are also expected to abide by and comply with the following, each as amended from time to time:

- the *Rules of the Law Society of Saskatchewan*,
- the *Code of Professional Conduct*,
- CPLED *Professional Integrity Policy*
- this Handbook,
- CPLED protocols (including the Submission Protocol and any Competency Evaluation Protocol), and
- other established policies and protocols.

Professional integrity

The CPLED Program is a critical element of the qualification process in Saskatchewan; it depends on the integrity of each student. Students are bound by the ethical standards of the profession and must conduct themselves with professional and academic integrity; this is required for successful completion of the CPLED Program.

Students are expected to maintain the highest standards of integrity in meeting CPLED Program requirements, including full compliance with the CPLED *Professional Integrity Policy* (Appendix 2) and with the *Code of Professional Conduct*. Breaches of professional integrity, including plagiarism, are not tolerated and may result in investigation, suspension, failure in the program

and disciplinary action by CPLED, or referral to the Law Society for investigation and disciplinary action.

Note:

Students with questions about whether particular conduct could trigger a breach of the CPLED *Professional Integrity Policy* should contact the CPLED Program Director.

Students who inadvertently breach the CPLED *Professional Integrity Policy* must immediately advise the CPLED Program Director.

Students with questions about whether particular conduct could trigger a general breach of the *Code of Professional Conduct* should contact the Law Society.

Communications

Emails or postings that are threatening or abusive in any manner will not be tolerated. It is expected that all communication between individuals will be professional and courteous at all times. If a student is found to have sent abusive or threatening messages, CPLED may suspend access to the CPLED Program without prior notice and will notify the student's principal.

Investigation and academic sanctions

The CPLED Program Director has the authority to investigate students if he or she suspects a student has breached the Professional Integrity Policy or has in any way failed to conduct themselves in a manner consistent with the professional and ethical standards expected of a lawyer.

If a student refuses to cooperate with an investigation or if, in the CPLED Program Director's opinion, a student has breached the Professional Integrity Policy or otherwise failed to conduct themselves in a manner consistent with the professional and ethical standards expected of a lawyer, the CPLED Program Director has the authority and discretion under Rule 159(5) of the *Rules of the Law Society of Saskatchewan* to impose academic sanctions by:

- a) placing conditions on the student's attendance in the Program,
- b) Imposing academic sanctions upon the student (including by imposing a grade of Incomplete or Failure (see "Possible Grades" section of this handbook) on any assignment or competency evaluation); and/or
- c) suspending the student from the Program.

Students may appeal a suspension imposed by the CPLED Program Director to a Hearing Panel pursuant to Rule 159(9). The CPLED Program Director may also refer matters to any Committee of the Benchers.

Student Work Product

Students are responsible for any work they produce as a result of participating in the CPLED Program. Students cannot lend, give, or sell their CPLED work or materials to any other students, prospective students, or individuals. If a student is found to have participated in or assisted another student's plagiarism in any way, directly or indirectly, he or she may be subject to disciplinary action by CPLED or the Law Society.

Instructions and protocols

In completing their work, students are expected to comply with all instructions and protocols including, but not limited to, the CPLED Submission Protocol (for online assignments and competency evaluations) and any specific competency evaluation protocols.

Assignments or competency evaluations that do not adhere to instructions or protocols may be deemed not submitted and may receive a grade of "competency not yet demonstrated" (CNYD).

Late or incomplete submissions

Unless a student obtains prior approval in writing from the Director, or unless the Director grants a deferral, submissions for assignments and competency evaluations are not accepted after the deadline. The ability to submit online ends promptly at **2:00 pm CST/MST** on the specified deadline. **Deadlines are strictly enforced.**

If a student submits more than one document to the Dropbox, the last document submitted at the time of the deadline is the one that is assessed or evaluated.

Incomplete submissions are provided feedback (for assignments) and evaluated (for competency evaluations) to the extent reasonably possible.

Collaboration on assignments

The CPLED Program emphasizes student involvement and participation. Subject to the CPLED *Professional Integrity Policy*, collaboration regarding assignments among students and between students and their principals and other lawyers in their firms is encouraged. It is an essential part of the learning process and a hallmark of practice as a lawyer.

Collaboration on competency evaluations

In respect of Competency Evaluations, collaboration, of any kind, is strictly prohibited on competency evaluations. Competency evaluations, competency evaluation submissions, and competency evaluation marking sheets are strictly confidential. Once the competency evaluation opens, questions can only be directed to the CPLED Program Director and/or the Bar Admissions Officer. See the CPLED *Professional Integrity Policy* (Appendix 2) for details.

Information and privacy

The Law Society and the Canadian Centre for Professional Legal Education (“CPLED”) collect, use, and disclose information, including personal information, for the purposes of delivering the CPLED Program.

General collection, use, and disclosure of personal information

The Law Society and CPLED collect, use, and disclose personal information for various purposes, including:

- to assist in the operation of the CPLED Program, including processing applications, administering the program and participation in it, and monitoring performance,
- to prevent, detect, sanction, or report any breach of the requirements of professional behavior, professional integrity, and academic integrity, and
- to provide evidence relevant to a breach of the requirements of professional behavior, professional integrity, and academic integrity.

This includes disclosing the names of students and the names of the organization(s) where they are completing their articles to facilitators and evaluators for the purposes of assisting in the operation of the CPLED Program and determining whether there are any conflicts involved in a particular individual assessing a student’s assignments and competency evaluations. This also includes collecting, using, and disclosing submitted assignments and competency evaluations for the purposes of evaluating and improving the CPLED Program. Any materials with personally identifying information are only disclosed for this purpose to individuals and organizations who are obligated to keep the information confidential pursuant to an agreement with the Law Society and CPLED.

Recording

CPLED records live performance of competency evaluations for the purposes of the CPLED Program. These purposes include evaluating student performance, training evaluators, and monitoring and assessing evaluator performance.

Exchange of information with principals

Marks and other student information are exchanged between the Law Society, CPLED administrators and the student's principal. This exchange of information is made for the purpose of monitoring student performance, assisting in the operation of the CPLED Bar Admissions Program and/or governing the articling process. Principals may be provided with results for both assignments and competency evaluations and of conduct and performance throughout the Program. Students give consent to this exchange of information when completing the Program Registration Form.

Except as prohibited by the CPLED *Professional Integrity Policy*, students are strongly encouraged to share information directly with their principals.

Special circumstances

In some cases, students may have individual needs that necessitate an accommodation, an excused absence, a deferral, scheduling change, or a withdrawal from the CPLED Program. More information about these options can be found below.

Accommodation

The Law Society is committed to ensuring that students with disabilities or special needs receive accommodation which assists them, but also maintains the integrity of the CPLED Program and materials. Any accommodation requested must not compromise the public interest in ensuring lawyers are qualified to provide competent legal services.

All requests for accommodation should be made to the CPLED Program Director and submitted in writing when registering for the CPLED Bar Admissions Program no later than 30 days before commencement of the Module for which the student is seeking accommodation.

Note: Accommodation does not relieve students of their responsibility to develop the essential competencies expected of all students. Students must meet the requirements and participate in the essential elements of the CPLED Program. Assessments or evaluations of students' work are based on ability or performance and not on the presence of a disability.

Approval of an *Application for Accommodation* is a two-step process. First, the CPLED Program Director decides whether or not to grant accommodation. The Director does not assess the disability but, rather, assesses the documentation provided by the student in support of the request. If the accommodation is granted, the second step is to decide the form of the

accommodation. Both parties are responsible for working towards a successful accommodation strategy.

Please see the *Policy on Accommodation* at Appendix 3 for further information.

Absences

Attendance at face-to-face CPLED sessions is mandatory for all students. Successful completion of the CPLED Program requires attendance and participation. Students are expected to be available for the entirety of a face-to-face session.

An application to be excused from the requirement of attendance and participation is to be made and addressed in accordance with the *Policy on Mandatory Attendance* (Appendix 4). Absences may only be excused with the approval of the CPLED Program Director, with or without conditions. The CPLED Program Director's decision is final. To apply for approval to be absent from any part of the CPLED Program, students must complete an *Application for an Excused Absence* form (included at Appendix 4) and submit it to the Bar Admissions Officer.

If a student would miss a substantial portion of a face-to-face session, or would miss the competency evaluation, the student must instead complete an *Application for a Deferral* form.

Note: Involvement in other work, regardless of its nature, does not constitute adequate reason for non-attendance, failure to participate, or failure to satisfactorily complete CPLED Program requirements. Students should not schedule work meetings, court appearances, or other firm-related activities during this time. Students are not granted an excused absence for these types of matters except in the most exceptional circumstances.

Consequences of Unauthorized Absences from the CPLED Program

After one unauthorized absence from the Program, the CPLED Program Director shall advise the student verbally and in writing that a further unauthorized absence will result in exclusion from the Program. The written warning shall be copied to the student's principal and the Law Society's Admissions and Education Committee. A further unauthorized absence will result in the student being expelled from the current Program. If this happens, the student and his/her principal will be advised in writing.

Late attendance

During the face-to-face sessions, lateness of sixty minutes or more shall constitute an unauthorized absence. Three occurrences of lateness less than sixty minutes shall also constitute an unauthorized absence from the Program.

A student expelled from the Program due to unauthorized absences shall not be allowed to repeat the Program without approval of the Admissions and Education Committee.

For further information please see the *Policy on Mandatory Attendance* at Appendix 4.

Deferrals

If a student is unable to complete a competency evaluation, he or she may apply to the CPLED Program Director for a deferral on or before the scheduled date of the requirement. If a student cannot complete an entire module, due to serious illness or other extraordinary circumstances beyond the student's control, he or she can also apply to the CPLED Program Director for a deferral of an entire module.

Deferral applications should be made as far in advance as possible and must be made no later than the scheduled date of the requirement. Students must complete an *Application for a Deferral* form (Appendix 5) and submit it to the Bar Admissions Office. Within seven days of submission of the student's application, the student must submit evidence satisfactory to the CPLED Program Director that the student is suffering from illness or other circumstances that materially contributed to his or her inability to complete the requirement. The CPLED Program Director may grant a deferral to a time and place determined by the CPLED Program Director and within a reasonable time of the original requirement. Where no application is received, or the Director is not satisfied that the application is adequately supported by evidence and the student does not complete the requirement, the CPLED Program Director may rule that the student stands failed in the requirement. There is no appeal from the CPLED Program Director's decision regarding deferrals. The Bar Admissions Office notifies a student of the CPLED Program Director's decision by email within 10 business days of receipt of all supporting documentation.

Note: A belated request for a deferral is not accepted except in the limited circumstances in which the student is able to show objectively that his or her judgment (at the time of the requirement) was impaired to such an extent that he or she was unable to know that a deferral should have been requested. Generally, this determination is only made on the basis of medical, psychiatric, or psychological evidence.

Scheduling requests

Students are expected to be available for the entirety of a CPLED face-to-face session. During certain portions of the face-to-face sessions, however, students may only be scheduled to attend for part of a day (e.g. for a learning exercise or competency evaluation). Though preliminary

schedules are posted online, students are not generally advised of the final schedule until the day before the scheduled exercise or evaluation.

As face-to-face sessions are always held in Saskatoon or Regina, the Bar Admissions office considers student travel time when scheduling learning exercises and competency evaluations. On the day of competency evaluations (the final day of the face-to-face sessions), students with the greatest travel distance are scheduled in the earliest time slots to account for their travel time.

Individual requests to be scheduled at a particular time are considered in limited cases:

- Requests *are* considered in cases of serious illness, bereavement, or extraordinary circumstances beyond the student's control;
- Requests *are not* considered in cases of conflicting work or personal travel plans.

Students can contact the Bar Admissions Office to discuss scheduling.

Withdrawals

A student who wishes to withdraw from the CPLED Program may apply to the CPLED Program Director. For students who have not yet commenced the CPLED Program, an *Application to Withdraw* is not required; they may simply request to cancel their registration.

A student who withdraws from the CPLED Program is eligible for a pro rata refund of tuition. The tuition refund is calculated based on the number of modules to which the student has not yet been provided access. Other fees (such as late registration fees) are non-refundable.

If a student is considering withdrawing due to an illness or medical condition, religious conviction, domestic affliction, bereavement, or other special or unusual circumstance, he or she may have grounds for a deferral. It is recommended that students who are considering withdrawing, first consider whether a deferral may better suit their circumstances.

Please see the *Application to Withdraw* at Appendix 6.

Resources for CPLED Students

CPLED Student Resources

In addition to basic information about articling and the CPLED Program (including *Rules of the Law Society of Saskatchewan* and this Handbook), all students have access to the following resources:

- online module-specific resources, through D2L in the Background Readings and Learning Exercises sections,
- competency-based resources available through the D2L CPLED Library, including skills and how-to materials and video resources, and
- a comprehensive set of resource and reference materials housed on the Student's Wiki and available through the D2L CPLED Library. (Students will be able to download and print materials, including the Saskatchewan Bar Course Resource Materials. Students may also purchase the Saskatchewan Bar Course Resource Materials as a thumb drive from the Bar Admissions Office.)

Answers to frequently asked questions (FAQs) are also posted on D2L; to access the FAQs in D2L, click on the "Course Materials" dropdown menu.

Please note that these materials are a **starting point** to assist in preparing assignments and competency evaluations. Students will have to determine for themselves (based on their own knowledge and comfort level) whether additional research or supplementary materials is needed.

External Resources

Other resources students may want to use during the CPLED Program include their legal text books, law school materials and notes, law journals and legal news updates (print or electronic) and other resources from law libraries.

The following websites (accessible to all CPLED students) may also be useful:

- Canadian Bar Association – Saskatchewan Branch (cbasask.org)
- Canadian Centre for Professional Legal Education (cpled.ca)
- CanLII (canlii.org)
- Law Society of Saskatchewan (lawsociety.sk.ca)
- Lawyers Concerned for Lawyers, Inc. (lawyersconcernedforlawyers.ca)
- Saskatchewan Law Courts (sasklawcourts.ca)
- Saskatchewan Queen's Printer (publications.gov.sk.ca/freelaw)
- Supreme Court of Canada (scc-csc.gc.ca)

Students should remember that principals, colleagues, LGFs, and law librarians are also valuable resources during their articling year.

Lawyers Concerned for Lawyers

Balancing the demands of articling and the CPLED Program can be challenging for students. Part of making a successful transition from law school to practice is learning how to manage stress in a healthy manner and knowing when to get outside help. Students who are feeling stressed or overwhelmed are encouraged to contact Lawyers Concerned for Lawyers. Students should not wait until an issue is affecting their performance.

Lawyers Concerned for Lawyers can help students address challenges proactively, setting them up for long-term success. Lawyers Concerned for Lawyers provides free, confidential assistance to lawyers, judges, law students, and their families. It is completely independent from the Law Society and CPLED.

For 24-hour confidential service call: 1-800-663-1142. For more information on Lawyers Concerned for Lawyers services, visit <http://lawyersconcernedforlawyers.ca>.

APPENDIX 1



Saskatchewan CPLED Bar Admissions Program



SASKATCHEWAN SUBMISSION PROTOCOL

Assignments or competency evaluations that do not follow this protocol may be deemed not submitted and may receive a standing of *Competency Not Yet Demonstrated*. Students must comply with the following requirements when submitting online assignments and competency evaluations.

1. FILE TYPE Save your assignment or competency evaluation in Word (.doc or .docx).
2. FILE NAME Use the following file naming protocol:

| Assignments (include name) | Competency Evaluations (do not include name) |
|--|--|
| — Last name_First name_Assignment | — Password_CE_Number |
| — Ex. Smith_Jane_M2U1 | — Ex. 0020510_CE_2 |
| <i>Jane Smith's Module 2 Unit 1 Assignment</i> | <i>Jane Smith's Module 2 Competency Evaluation</i> |

Examples in the Submission Protocol use Module 2 and the name, Jane Smith, with password 0020510

3. HEADER Minimum 8-point font - on each page
 - Header name should be the same as the File Name assigned to the assignment, or competency evaluation; ex., Smith Jane M2U1 (for unit assignments) or 0020510 CE 2 (for competency evaluations)
 - Disable automated file naming which includes your name, firm name, or firm contact information, or ensure your firm's IT person disables it.
4. FONT Arial font, 11-point minimum, (do not use Arial Narrow).
5. SPACING 1.5 line spacing throughout
6. MARGINS 1-inch margins – all four margins should be at least one inch.
7. NUMBERING Number each page.
8. CITATIONS Put citations in the text of your assignment or competency evaluation, not in a footnote or endnote.
9. WORD COUNT Do not exceed the number of words set for the assignment or competency evaluation. This can be found in the Module Introduction.
10. SPELL CHECK Spell check your assignment or competency evaluation.
11. INTEGRITY Comply with CPLED's *Professional Integrity Policy*, found in Appendix 2, CPLED Module Introductions and on the Student Wiki.
12. DEADLINE Submit the assignment or competency evaluation before the deadline.
13. DROPBOX Submit the assignment or competency evaluation into the D2L dropbox as an attachment on the appropriate assignment submission page.

APPENDIX 2



Saskatchewan CPLED Bar Admissions Program



PROFESSIONAL INTEGRITY POLICY

(Revised November 1, 2017)

1. CPLED students must conduct themselves with the honesty and professional integrity expected of a lawyer. To ensure licensing requirements are met and to protect the integrity of the CPLED Program, students are bound by the additional provisions in this policy.
2. The onus is on the student to seek clarification from the CPLED Director concerning any activity that could violate this policy.

Definitions

3. In this policy:
 - a. "Assignment" means the instructions, fact scenarios and supporting documentation relating to the educational component of the CPLED Program.
 - b. "Assignment Submission" means the materials created or submitted by a student completing an Assignment
 - c. "Assignment Feedback" means comments provided by Facilitators on Assignment Submissions.
 - d. "Competency Evaluation" means the instructions, fact scenarios and supporting documentation relating to the licensing component of the CPLED Program.
 - e. "Competency Evaluation Submission" means all materials created, presented or submitted by a student completing a Competency Evaluation.
 - f. "Competency Evaluation Marking Sheet" means the marking sheet completed by the Facilitators in the marking of Competency Evaluation Submissions.
 - g. "CE Documents" means all past and present CPLED Competency Evaluations, Competency Evaluation Submissions and Competency Evaluation Marking Sheets.
 - h. "CPLED Director" means the Director of the CPLED Program in each province.
 - i. "CPLED Staff" means the staff of the CPLED Program in each province.

- j. “Facilitators” means persons retained by the CPLED Program in each province to provide Assignment Feedback to students and assist them in developing their skills and knowledge.

General Permissions

4. Subject to paragraph 5, as much as possible, students should engage in CPLED activities in the same way they engage in the practice of law. Students may discuss and analyze the general law, background materials, precedents and learning exercises.
5. CPLED’s primary role is to evaluate students to ensure that they meet licensing requirements for admission to the profession. When students are engaged in CPLED evaluation activities they must ensure that the work they submit or present represents their own knowledge, skills and abilities. This *Professional Integrity Policy* restricts students’ ability to share information when they are completing Assignments and Competency Evaluations.

Original Work

6. All Assignment Submissions and Competency Evaluation Submissions must be the student’s own original work. Students may use precedents, including their own CPLED work, to prepare Assignment Submissions and Competency Evaluation Submissions.
7. To prepare their Assignment Submissions and Competency Evaluation Submissions students may use and discuss precedents from:
 - a. their offices,
 - b. the CPLED resource materials,
 - c. the CPLED skills materials,
 - d. commercial providers, and
 - e. other sources, except Assignment Submissions or Competency Evaluation Submissions from current or previous CPLED students.
8. Copying, paraphrasing or incorporating precedents as permitted in paragraph 7 is not plagiarism, but students must provide the source of any precedent that they copy, paraphrase or incorporate. Students may be asked to produce any precedent they copy, paraphrase or incorporate.
9. Students who copy, paraphrase, or incorporate all or any part of primary or secondary research materials, including CPLED resource materials, into their Assignment Submissions or Competency Evaluation Submissions must provide proper attribution.

Confidentiality

10. Students may discuss and analyze Assignments, Assignment Submissions and Assignment Feedback with others.
11. Students must not disclose or discuss CE Documents with anyone except the CPLED Director or CPLED Staff. Students may discuss their CE Documents with counsel in the event of an appeal or disciplinary procedures.
12. Students must ensure that their CE Documents remain confidential by storing them securely through the use of password protection or in a place accessible only to the student.
13. To ensure confidentiality, CPLED recommends that students destroy all CE Documents after they complete the CPLED Program.

Consequences of Breach

14. A student who inadvertently breaches this policy must immediately advise the CPLED Director.
15. A student who breaches this policy may be subject to imposition of a grade of competency not yet demonstrated, suspension, or other consequences.

APPENDIX 3



Saskatchewan CPLLED Bar Admissions Program



POLICY ON ACCOMMODATION

Introduction

The Law Society of Saskatchewan (hereafter called the “Law Society”) strives to ensure the Canadian Centre for Professional Legal Education (CPLLED) Program promotes equality and accessibility. In accordance with Saskatchewan human rights law, such equality requires the accommodation of differences that arise from the enumerated grounds listed in the *Saskatchewan Human Rights Code* (hereafter called the “Code”).

Purpose

The purpose of this document is to outline the policy and procedures for students in the CPLLED Program to request an accommodation based on the enumerated grounds listed in Section 2(1)(m.01) of the *Code*.

Policy

The Law Society is committed to ensuring that students in the CPLLED program are treated equally and further that persons who wish to provide legal services in Saskatchewan are not disadvantaged in succeeding in the Bar Admissions Process because of one or more of the following grounds enumerated in the *Code*: religion, creed, marital status, family status, sex, sexual orientation, disability, age, colour, ancestry, nationality, place of origin, race or perceived race, receipt of public assistance, or gender identity.

The Law Society recognizes that this commitment to equality requires that it take all measures short of undue hardship to accommodate students in circumstances that arise as a result of one or more of the enumerated grounds. Any accommodation requested and provided must not compromise the integrity of the CPLLED program and the public interest in ensuring that lawyers are qualified to provide competent legal services.

Confidentiality of Students’ Personal Information

Personal information of students requesting an accommodation will be kept confidential at all times and used solely for the purposes of considering and providing an accommodation.

Disclosure of Information

Students requesting an accommodation have a responsibility to provide information sufficient to facilitate the requested accommodation. In the context of a disability related accommodation (which for the purposes of this policy, includes any condition defined in Section 2(1)(d.1) of the *Code* or a pregnancy related need), a student will be required to provide medical confirmation that the disability exists, but will not be required to disclose the specific type of disability or a

diagnosis. This information may be voluntarily provided by the student, where he/she feels comfortable doing so.

Procedure to Request a CPLED Accommodation

Students seeking an accommodation must follow the following procedure:

- I. The student must make a written request for accommodation to the CPLED Program Director, by completing and submitting the *Accommodation Request Form* and all necessary supporting documentation.
- II. The request for accommodation and all supporting documents must be submitted at least **thirty days before the start of the module** for which the student is seeking accommodation unless there is a change to the student's circumstances at a later date (such as a new medical condition or a pregnancy related need).
- III. The student is encouraged to identify the ground(s) upon which the accommodation is requested.
- IV. The student must provide sufficient information to confirm the existence of a need for accommodation and the type(s) of accommodation requested.

Approval of a Request for Accommodation and Undue Hardship

Approval of a request for accommodation is a two-step process. The first step is consideration of whether or not to grant an accommodation. If accommodation is granted, the second step is to decide the form of the accommodation. This determination is made on a case-by-case basis. It is not the Law Society's role to assess the student's need but, rather, to assess the documentation provided by the student in support of the request. As such, the CPLED Program Director will consider suggestions or recommendations offered by the student and/or a supporting medical professional in arriving at a plan for accommodation. The CPLED Program Director may consult with the student to determine whether a requested or approved accommodation will be appropriate or should be modified.

In accordance with Saskatchewan human rights law, an accommodation will not be provided if it imposes undue hardship on the Law Society. A number of factors are weighed when assessing whether or not the hardship associated with an accommodation is undue, including but not limited to: the nature of the requested accommodation, the financial cost of the accommodation, the ability of the student receiving the accommodation to meet the program requirements, the degree to which the requested accommodation might impact on the learning opportunities of other students and whether health or safety concerns would arise as a result of the accommodation.

Review Procedure

If an accommodation is refused or the student considers the approved accommodation to be unsatisfactory, the student may request a review in writing to the Admissions and Education Committee of the Law Society, whose decision will be final.

A written review request must be submitted within ten business days after the date on which the CPLED Program Director notifies the student in writing of its decision. Review requests should be submitted by email to the Bar Admissions Officer.



Saskatchewan CPLLED Bar Admissions Program



REQUEST FOR ACCOMMODATION

Students may request accommodation for the Canadian Centre for Professional Legal Education (CPLLED) Program based on a condition and/or circumstance that arises from an enumerated ground listed in Section 2(1)(m.01) of the *Saskatchewan Human Rights Code* (hereafter called the “Code”)

Students seeking accommodation must review the Law Society’s CPLLED Bar Admissions Program - Policy on Accommodation, which includes important information on the accommodation process.

Once complete, please submit this Request for Accommodation Form and all supporting documentation by one of the following methods:

1. Scan and email to: bar.admissions@lawsociety.sk.ca;
2. Mail to: Bar Admissions, Law Society of Saskatchewan, 1100-2002 Victoria Ave, Regina, SK, S4P 0R7;
3. In-person to the Law Society of Saskatchewan at the address listed above

Personal Information

| | | |
|---------------------------|------------------------|-------------|
| Surname | First Name and Initial | |
| Street Address / P.O. Box | City / Town | Postal Code |
| Telephone | Email | |

Grounds for Accommodation

In this section, please identify the ground(s) upon which you are seeking accommodation. Select all that apply:

- Disability due to a physical condition (as defined in Section 2(1)(d.1) of the *Code*)
- Disability due to a cognitive and/or psychological condition (as defined in Section 2(1)(d.1) of the *Code*)
- Pregnancy related condition or need
- Religion and/or Creed (including Religious Observance)
- Other: _____

Please include any additional details related to the selected ground(s) in the space provided. You must include sufficient information to confirm the existence of a need for accommodation and the type(s) of accommodation requested.

If you are requesting accommodation related to a disability (which for the purposes of this form, includes any condition defined in Section 2(1)(d.1) of the *Code* or a pregnancy related need), you are required to provide medical confirmation that the disability exists but will not be required to disclose the specific type of disability or a diagnosis. You may voluntarily provide this information if you feel comfortable doing so.

Description of Accommodation Requested

In this section, please provide details of the specific accommodation(s) you are requesting. Be as specific as possible. For example, if you are requesting additional time, specify the amount of additional time you are requesting.

Past Accommodations

In this section, please describe and/or list any past accommodation(s) from educational institutions or employers, and enclose documentation evidencing such accommodation(s) with this form. For instance, you may provide a letter from your law school, undergraduate school of study, or the National Committee on Accreditation listing all accommodations received, if accommodations were provided.

Requirements for Supporting Documentation

If you are requesting accommodation(s) related to a disability (as defined in Section 2(1)(d.1) of the *Code* or a pregnancy related need), you are required to provide verifiable medical documentation in support of your request. If you are requesting accommodation related to a cognitive and/or psychological condition (as defined in Section 2(1)(d.1) of the *Code*), a psychological or psycho-educational assessment report is also required.

Applicant Confirmation and Signature

I confirm that the foregoing is an accurate description of the circumstances giving rise to this request for accommodation.

Date

Signature of Applicant

APPENDIX 4



Saskatchewan CPLLED Bar Admissions Program



POLICY ON MANDATORY ATTENDANCE

This policy was adopted by the Admissions and Education Committee of The Law Society of Saskatchewan on April 17, 2002.

General principle

Rule 159(3) of the Law Society Rules provides that all students-at-law must attend all classes of the CPLLED Program and complete an affidavit of attendance for each segment of the Program. Rule 159(7) gives the CPLLED Program Director (CPLLED Program Director) the discretion to approve a student-at-law's absence from any class of the Program.

These rules demonstrate that the Law Society sees the CPLLED Bar Admissions Program as a vital component of the articling experience and attendance at the Program as a responsibility that students must take very seriously. Unauthorized absences will result in exclusion from the Program. As well, the discretion to permit absences must be exercised in a manner that is consistent with this approach.

Consequences of unauthorized absences from the Program

After one unauthorized absence from the Program, the CPLLED Program Director shall advise the student verbally and in writing that a further unauthorized absence will result in exclusion from the Program. The written warning shall be copied to the student's principal and the Law Society's Admissions and Education Committee. A further unauthorized absence will result in the student being advised in writing that they are expelled from the current Program.

Lateness of sixty minutes or more shall constitute an unauthorized absence from the Program. Three occurrences of lateness less than sixty minutes shall also constitute an unauthorized absence from the Program.

A student expelled from the Program due to unauthorized absences shall not be allowed to repeat the Program without approval of the Admissions and Education Committee.

Factors governing how absences will be authorized

Students must make requests for authorized absences from the Program in writing to the CPLED Program Director, prior to the time of the proposed absence. If the absence is approved, the CPLED Program Director will provide a letter approving the absence. In exercising the discretion to permit absences, the CPLED Program Director will consider these factors:

1. Length of the absence requested
 - a) The length of absence may adversely impact upon the student's ability to satisfactorily complete the Program work. Likewise, the subjects covered during the absence may be critical to passing the Program.
2. Reason for the student's absence
 - a) Health and family circumstances. Clearly, serious health and family concerns are valid reasons to approve an absence from the Program and will be considered appropriately on an individual basis.
 - b) Educational opportunities. If the absence is requested to allow the student to take advantage of other educational opportunities, these additional factors should be considered:
 - i. the content of the educational opportunity
 - ii. the relevancy of the education to the articling experience
 - iii. whether there will be similar educational opportunities which the student may take advantage of in the future
 - c) Work related obligations. The Law Society has asked principals to allow students to focus exclusively on their Program work for the duration of each segment of the CPLED Bar Admission Program. Accordingly, absences to fulfill work related obligations will only be permitted in the most exceptional circumstances.
 - d) Any other reason deemed in the discretion of the CPLED Program Director to be compelling and/or acceptable.
3. Circumstances of the individual student
 - a) Number of previous requests for absences
 - b) Overall performance during the Program
 - c) Timeliness of request



Saskatchewan CPLed Bar Admissions Program



APPLICATION FOR AN EXCUSED ABSENCE

Students may request to be excused from attendance and/or participation at one or more face-to-face components of the CPLed Program, other than a competency evaluation. Please read and follow the attached instructions to avoid delay or rejection of your application.

Personal Information

| | |
|-----------|------------------------|
| Surname | First Name and Initial |
| Telephone | Email |

Request

I request to be excused from the following portion(s) of the face-to-face modules held on the date(s) listed below:

| Reason for Absence | Supporting Documentation |
|--|---|
| I request to be excused for the following reasons: <ul style="list-style-type: none"> <input type="checkbox"/> Illness/medical condition <input type="checkbox"/> Religious conviction <input type="checkbox"/> Domestic affliction/bereavement <input type="checkbox"/> Other circumstance, namely: | I am providing the following documentation in support: <ul style="list-style-type: none"> <input type="checkbox"/> Medical documentation <input type="checkbox"/> Letter from my religious organization <input type="checkbox"/> Death certificate, accident report or similar evidence <input type="checkbox"/> Other (specified below) <input type="checkbox"/> None The above documentation is: <ul style="list-style-type: none"> <input type="checkbox"/> Attached <input type="checkbox"/> To follow |

Additional information (attach a separate sheet if required):

| |
|--|
| |
|--|

Applicant Confirmation and Signature

I confirm that I have read and understood the instructions and requirement of this form and that all the information and documentation provided in support of this application are accurate and true. Further, I authorize the Law Society of Saskatchewan to contact those who have provided documentation submitted in support of this application, including but not limited to medical documentation, for purposes of verifying authenticity.

| | |
|------|------------------------|
| Date | Signature of Applicant |
| | |
| | |

| Decision (Office Use Only) | |
|--|---|
| <input type="checkbox"/> Approved without conditions <input type="checkbox"/> Approved with conditions Conditions, if any: | <input type="checkbox"/> Denied Reasons for decision: <input type="checkbox"/> Substantial portion of face-to-face content and/or competency evaluation – student must complete <i>Application for Deferral</i> <input type="checkbox"/> Request relates to travel plans or work-related conflicts <input type="checkbox"/> Other |
| Other Comments | |
| Director Signature | Date |

INSTRUCTIONS FOR COMPLETING AN APPLICATION FOR AN EXCUSED ABSENCE

Please read and follow these instructions to avoid delay or rejection of your application.

General Information

- 1. Mandatory Attendance.** Attendance at face-to-face CPLED sessions is mandatory for all students. Successful completion of the CPLED Program requires attendance and participation. Students are expected to be available for the entirety of a face-to-face session.
- 2. Application for an Excused Absence.** An application to be excused from the requirement of attendance and participation shall be governed by the *Policy on Mandatory Attendance*. Students requesting to be excused from the requirement of attendance and participation may apply to the CPLED Program Director. Absences may only be excused with the approval of the Director, with or without conditions.
- 3. Missing a Substantial Portion and/or Competency Evaluation.** If the student would miss a substantial portion of a face-to-face session, or would miss the competency evaluation, the student must instead complete an *Application for a Deferral* form.
- 4. Documentation.** If the student has supporting documentation to include, that documentation must be provided within seven days of the student's application.
- 5. Belated Requests for an Excused Absence.** A belated request for an excused absence is made where a student unexpectedly misses a material portion of a face-to-face component of the CPLED Program (i.e. late arrival).
- 6. Decision.** The Director may grant an excused absence, with or without conditions. The Bar Admissions Office will notify a student of the Director's decision by email within 10 business days of receipt of all supporting documentation.

Instructions for Completing an Application for an Excused Absence

- Complete the application in full.
 - a. Student Information.** Complete the Student Information section, including an email and phone number at which to contact you if further particulars are required. For official correspondence, the Bar Admissions Office uses the current contact information on file. If your contact information has changed, please contact the Bar Admissions Office as soon as possible.
 - b. Request.** Identify the specific dates and times of the requested absence. If the contemplated absence would result in the student missing:
 - (i) a substantial portion of a face-to-face session, or
 - (ii) a competency evaluation,the request will be denied and the student will be advised to complete an *Application for a Deferral* form.
 - c. Reason for Absence.** Please identify the reason for your request to be excused from attendance. Travel plans, and work-related conflicts are not valid reasons for a request.
 - d. Signature.** Please sign the application to confirm that you have read and understood the instructions and requirements of the form and that all the information and documentation provided in support of the application is accurate and true. By signing this form, you are also authorizing the Law Society of Saskatchewan to contact those who have provided documentation submitted in support of the application, including but not limited to medical documentation, for purposes of verifying authenticity.
- Submit the application form and supporting documentation to the Bar Admissions Office, Attn: Bar Admissions Officer at 1100 - 2002 Victoria Avenue, Regina, SK, S4P 0R7 or by email to bar.admissions@lawsociety.sk.ca.

APPENDIX 5



Saskatchewan CPLED Bar Admissions Program



APPLICATION FOR A DEFERRAL

Students may request to defer one or more CPLED modules or competency evaluations. Please read and follow the attached instructions to avoid delay or rejection of your application.

Personal Information

| | |
|-----------|------------------------|
| Surname | First Name and Initial |
| Telephone | Email |

Request

I request to defer the following module(s):

| | |
|--|--|
| <input type="checkbox"/> Interviewing & Advising: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp <input type="checkbox"/> Legal Research & Writing: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp <input type="checkbox"/> Drafting Contracts: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp <input type="checkbox"/> Oral Advocacy: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp <input type="checkbox"/> Written Advice and Advocacy: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp | <input type="checkbox"/> Drafting Pleadings: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp <input type="checkbox"/> Client Relationship Management: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp <input type="checkbox"/> Practice Management/Ethics & Professionalism: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp <input type="checkbox"/> Negotiations: <input type="checkbox"/> CE <input type="checkbox"/> Full module <input type="checkbox"/> Supp |
|--|--|

| | |
|---|--|
| Reason for Absence | Supporting Documentation |
| I request to be excused for the following reasons: <input type="checkbox"/> Illness/medical condition <input type="checkbox"/> Religious conviction <input type="checkbox"/> Domestic affliction/bereavement <input type="checkbox"/> Other circumstance, namely: | I am providing the following documentation in support: <input type="checkbox"/> Medical documentation <input type="checkbox"/> Letter from my religious organization <input type="checkbox"/> Death certificate, accident report or similar evidence <input type="checkbox"/> Other (specified below) <input type="checkbox"/> None The above documentation is: <input type="checkbox"/> Attached <input type="checkbox"/> To follow |

Additional information (attach a separate sheet if require):

| |
|--|
| |
|--|

Applicant Confirmation and Signature

I confirm that I have read and understood the instructions and requirement of this form and that all the information and documentation provided in support of this application are accurate and true. Further, I authorize the Law Society of Saskatchewan to contact those who have provided documentation submitted in support of this application, including but not limited to medical documentation, for purposes of verifying authenticity.

| | |
|------|------------------------|
| Date | Signature of Applicant |
| | |
| | |

| Decision (Office Use Only) | |
|--|---|
| <input type="checkbox"/> Approved without conditions <input type="checkbox"/> Approved with conditions Conditions, if any: | <input type="checkbox"/> Denied Reasons for decision: <input type="checkbox"/> Substantial portion of face-to-face content and/or competency evaluation – student must complete <i>Application for Deferral</i> <input type="checkbox"/> Request relates to travel plans or work-related conflicts <input type="checkbox"/> Other |
| Other Comments | |
| Director Signature | Date |

INSTRUCTIONS FOR COMPLETING AN APPLICATION FOR A DEFERRAL

Please read and follow these instructions to avoid delay or rejection of your application.

General Information

1. **Application for a Deferral.** Students who are unable to complete a CPLED assignment, competency evaluation, examination, or supplemental may apply to the CPLED Program Director for a deferral **on or before the scheduled date of the requirement.**
2. **Documentation.** Within **seven days of the student's application**, the application must be supported by evidence satisfactory to the CPLED Program Director that the student is suffering from illness or other circumstances that materially contributed to his or her inability to complete the requirement.
3. **Belated Requests for Deferral.** A belated request for deferral is accepted in the limited circumstances in which the student is able to show objectively that their judgment (at the time of the requirement) was impaired to such an extent that they were unable to know that a deferral should have been requested. Generally, this determination is only made on the basis of medical, psychiatric or psychological evidence.
4. **Decision.** The Director may grant a deferral to a time and place determined by the CPLED Program Director and within a reasonable time of the original requirement. Where no application is received, or the CPLED Program Director is not satisfied that the application is adequately supported by evidence, he/she may rule that the student stands failed in the requirement. There is no appeal from the CPLED Program Director's decision regarding deferrals. The Bar Admissions Office will notify a student of the Director's decision by email within 10 business days of receipt of all supporting documentation.

Instructions for Completing an Application for an Excused Absence

1. Complete the application in full.
 - a. **Student Information.** Complete the Student Information section, including an email and phone number at which to contact you if further particulars are required. For official correspondence, the Bar Admissions Office uses the current contact information on file. If your contact information has changed, please contact the Bar Admissions Office as soon as possible.
 - b. **Request.** Identify the specific modules and/or competency evaluations you are requesting to defer.
 - c. **Reason for Deferral.** Identify the reason for your request to defer. Deferrals may be granted in cases of serious illness or extraordinary circumstances beyond the student's control. Travel plans and work-related conflicts are not valid reasons for a request.
 - d. **Supporting Documentation.** Requests are not approved without written evidence of the need for a deferral. Supporting documentation is required in all circumstances. Submission of documentation does not in itself constitute grounds for approval. The reasons in support of the request must clearly demonstrate serious illness or extraordinary circumstances beyond the student's control that would warrant deferral. Note the following:
 - (i) If you are requesting to defer due to a serious illness or medical condition, then you must be seen by a physician while you are ill. Medical documentation must be on official letterhead of the service provider and include (a) date of onset of illness and date seen by the physician, (b) anticipated date of recovery, and (c) degree of incapacitation.
 - (ii) If you are requesting to defer due to a religious conviction, then you must provide a letter from your religious organization. Religious documentation must be on official letterhead of the religious organization.
 - (iii) If you are requesting to defer due to a domestic affliction/bereavement (e.g. a death in the family or serious accident), then you must provide a copy of the death certificate, accident report, or other similar documentation.

- (iv) If you are requesting to defer due to a special or unusual circumstance such that the requirement to attend and participate would be unfair or unreasonable, then please consult the Bar Admissions Office regarding appropriate documentation.
 - e. **Signature.** Please sign the application to confirm that you have read and understood the instructions and requirements of the form and that all the information and documentation provided in support of the application is accurate and true. By signing this form, you are also authorizing the Law Society of Saskatchewan to contact those who have provided documentation submitted in support of the application, including but not limited to medical documentation, for purposes of verifying authenticity.
2. Submit the application form and supporting documentation to the Bar Admissions Office, Attn: Bar Admissions Officer at 1100 - 2002 Victoria Avenue, Regina, SK, S4P 0R7 or by email to bar.admissions@lawsociety.sk.ca.

APPENDIX 6



Saskatchewan CPLed Bar Admissions Program



APPLICATION TO WITHDRAW

Personal Information

| | |
|-----------|------------------------|
| Surname | First Name and Initial |
| Telephone | Email |

Request

| | |
|--|---|
| I request to withdraw from the CPLed Program effective [YYYY-MM-DD]: | |
| Reason for Withdrawal | Important – Please Read |
| I request to withdraw for the following reasons: | <input type="checkbox"/> If your request to withdraw is due to an illness/ medical condition, religious conviction, domestic affliction/bereavement, or other special or unusual circumstance, he or she may have grounds to support an <i>Application for Deferral</i> . Please contact the Bar Admissions Office for details. |

Additional information (attach a separate sheet if required):

| |
|--|
| |
|--|

Applicant Confirmation and Signature

I confirm that I have read and understood the instructions and requirement of this form and that all the information and documentation provided in support of this application are accurate and true. Further, I authorize the Law Society of Saskatchewan to contact those who have provided documentation submitted in support of this application, including but not limited to medical documentation, for purposes of verifying authenticity.

| | |
|------|------------------------|
| Date | Signature of Applicant |
| | |
| | |

| Decision (Office Use Only) | |
|---|--|
| Approved effective: | |
| Modules to which the student was provided access prior to effective date of withdrawal: <input type="checkbox"/> IA <input type="checkbox"/> LRW <input type="checkbox"/> DC <input type="checkbox"/> OA <input type="checkbox"/> WAA <input type="checkbox"/> DP <input type="checkbox"/> CRM <input type="checkbox"/> PM/EP <input type="checkbox"/> NEG | Tuition refund, if any: \$ _____ <input type="checkbox"/> Tuition not paid <input type="checkbox"/> Full refund: \$ _____ <input type="checkbox"/> Partial refund: \$ _____ Refund paid to: <input type="checkbox"/> Student <input type="checkbox"/> Firm Method of refund: <input type="checkbox"/> Cheque <input type="checkbox"/> Credit Card |
| Other Comments | |
| Director Signature | Date |

INSTRUCTIONS FOR COMPLETING AN APPLICATION FOR WITHDRAWAL

Please read and follow these instructions to avoid delay or rejection of your application.

General Information

- 1. Application to Withdraw.** A student who wishes to withdraw from the CPLED Program may apply to the CPLED Program Director. For a student who has not yet commenced the CPLED Program, an *Application to Withdraw* is not required; the student may simply request to cancel their registration.
- 2. Tuition Refund.** A Student who withdraws from the CPLED Program is eligible for a *pro rata* refund of tuition. The tuition refund is calculated based on the number of modules to which a student has not yet been provided access. Other fees, such as late registration fees, are non-refundable.
- 3. Decision.** The Legal Education Society of Saskatchewan will notify you of the Director's decision by email within 10 business days of receipt of a completed *Application to Withdraw*.

Instructions for Completing an Application to Withdraw

1. Complete the application in full.
 - a. **Student Information.** Complete the Student Information section, including an email and phone number at which to contact you if further particulars are required. For official correspondence, the Bar Admissions Office uses the current contact information on file. If your contact information has changed, please contact the Bar Admissions Office as soon as possible.
 - b. **Request.** Identify the effective date of your requested withdrawal. The effective date of the withdrawal determines tuition refund eligibility.
 - c. **Reason for Withdrawal.** Identify the reason of your request to withdraw. If you are withdrawing for reasons that would constitute grounds for a deferral (i.e. serious illness or extraordinary circumstances beyond your control), contact the Bar Admissions Office for information about an *Application for Deferral*.
 - d. **Signature.** Please sign the application to confirm that you have read and understood the instructions and requirements of the form and that all the information and documentation provided in support of the application is accurate and true.
2. Submit the application form to the Bar Admissions Office, Attn: Bar Admissions Officer at 1100 - 2002 Victoria Avenue, Regina, SK, S4P 0R7 or by email to bar.admissions@lawsociety.sk.ca.

APPENDIX 7

Federation of Law Societies of Canada National Competency Profile

1. SUBSTANTIVE LEGAL KNOWLEDGE

All applicants are required to demonstrate a general understanding of the core legal concepts applicable to the practice of law in Canada in the following areas:

1.1. Canadian Legal System

- a) The constitutional law of Canada, including federalism and the distribution of legislative powers
- b) The Charter of Rights and Freedoms
- c) Human rights principles and the rights of Aboriginal peoples of Canada and in addition for candidates in Quebec, the Quebec Charter of Human Rights and Freedoms
- d) For candidates in Canadian common law jurisdictions, key principles of common law and equity. For candidates in Quebec, key principles of civil law
- e) Administration of the law in Canada, including the organization of the courts, tribunals, appeal processes and non-court dispute resolution systems
- f) Legislative and regulatory system
- g) Statutory construction and interpretation

1.2 Canadian Substantive Law

- a) Contracts and in addition for candidates in Quebec: obligations and sureties
- b) Property
- c) Torts
- d) Family, and in addition for lawyers and notaries in Quebec, the law of persons
- e) Corporate and commercial
- f) Wills and estates
- g) Criminal, except for Quebec notary candidates
- h) Administrative
- i) Evidence (for Quebec notaries, only as applicable to uncontested proceedings)
- j) Rules of procedure
 - i. Civil
 - ii. Criminal, except for Quebec notary candidates

- iii. Administrative
- iv. Alternative dispute resolution processes

1.3 Ethics and Professionalism

- a) Principles of ethics and professionalism applying to the practice of law in Canada

1.4 Practice Management

- a) Client development
- b) Time management
- c) Task management

2. SKILLS

All applicants are required to demonstrate that they possess the following skills:

2.1 Ethics and Professionalism Skills

- a) Identifying ethical issues and problems
- b) Engaging in critical thinking about ethical issues
- c) Making informed and reasoned decisions about ethical issues

2.2 Oral and Written Communication Skills

- a) Communicating clearly in the English or French language, and in addition for candidates in Quebec, the ability to communicate in French as prescribed by law
- b) Identifying the purpose of the proposed communication
- c) Using correct grammar and spelling
- d) Using language suitable to the purpose of the communication and the intended audience
- e) Eliciting information from clients and others
- f) Explaining the law in language appropriate to audience
- g) Obtaining instructions
- h) Effectively formulating and presenting well-reasoned and accurate legal argument, analysis, advice or submissions
- i) Procedures applicable to the following types of transactions:
 - i. Commercial
 - ii. Real Estate
 - iii. Wills and estates
- j) Advocating in a manner appropriate to the legal and factual context.

This item does not apply to applicants to the Chambre des notaires du Québec

- k) Negotiating in a manner appropriate to the legal and factual context

2.3 Analytical Skills

- a) Identifying client's goals and objectives
- b) Identifying relevant facts, and legal, ethical, and practical issues
- c) Analyzing the results of research
- d) Identifying due diligence required
- e) Applying the law to the legal and factual context
- f) Assessing possible courses of action and range of likely outcomes
- g) Identifying and evaluating the appropriateness of alternatives for resolution of the issue or dispute

2.4 Research Skills

- a) Conducting factual research
- b) Conducting legal research including:
 - i. Identifying legal issues
 - ii. Selecting relevant sources and methods
 - iii. Using techniques of legal reasoning and argument, such as case analysis and statutory interpretation, to analyze legal issues
 - iv. Identifying, interpreting and applying results of research
 - v. Effectively communicating the results of research
- c) Conducting research on procedural issues

2.5 Client Relationship Management Skills

- a) Managing client relationships (including establishing and maintaining client confidence and managing client expectations throughout the retainer)
- b) Developing legal strategy and advising client in light of client's circumstances (for example, diversity, age, language, disability, socioeconomic, and cultural context)
- c) Advising client in light of client's circumstances (for example, diversity, age, language, disability, socioeconomic, and cultural context)
- d) Maintaining client communications
- e) Documenting advice given to and instructions received from client

2.6 Practice Management Skills

- a) Managing time (including prioritizing and managing tasks, tracking deadlines)
- b) Delegating tasks and providing appropriate supervision

- c) Managing files (including opening/closing files, checklist development, file storage/destruction)
- d) Managing finances (including trust accounting)
- e) Managing professional responsibilities (including ethical, licensing, and other professional responsibilities)

3. TASKS

All applicants are required to demonstrate that they can perform the following tasks:

3.1 GENERAL TASKS

3.1.1 Ethics, professionalism and practice management

- a) Identify and resolve ethical issues
- b) Use client conflict management systems
- c) Identify need for independent legal advice
- d) Use time tracking, limitation reminder, and bring forward systems
- e) Use systems for trust accounting
- f) Use systems for general accounting
- g) Use systems for client records and files
- h) Use practice checklists
- i) Use billing and collection systems

3.1.2 Establishing client relationship

- a) Interview potential client
- b) Confirm who is being represented
- c) Confirm client's identity pursuant to applicable standards/rules
- d) Assess client's capacity and fitness
- e) Confirm who will be providing instructions
- f) Draft retainer/engagement letter
- g) Document client consent/instructions
- h) Discuss and set fees and retainer

3.1.3 Conducting matter

- a) Gather facts through interviews, searches and other methods
- b) Identify applicable areas of law
- c) Seek additional expertise when necessary

- d) Conduct legal research and analysis
- e) Develop case strategy
- f) Identify mode of dispute resolution
- g) Conduct due diligence (including ensuring all relevant information has been obtained and reviewed)
- h) Draft opinion letter
- i) Draft demand letter
- j) Draft affidavit/statutory declaration
- k) Draft written submission
- l) Draft simple contract/agreement
- m) Draft legal accounting (for example, statement of adjustment, marital financial statement, estate division, bill of costs)
- n) Impose, accept, or refuse trust condition or undertaking
- o) Negotiate resolution of dispute or legal problem
- p) Draft release
- q) Review financial statements and income tax returns

3.1.4 Concluding Retainer

- a) Address outstanding client concerns
- b) Draft exit/reporting letter

3.2 ADJUDICATION/ALTERNATIVE DISPUTE RESOLUTION

3.2.1. All applicants, except for applicants for admission to the Chambre des notaires du Québec, are required to demonstrate that they can perform the following tasks:

- a) Draft pleading
- b) Draft court order
- c) Prepare or respond to motion or application (civil or criminal)
- d) Interview and brief witness
- e) Conduct simple hearing or trial before an adjudicative body

3.2.2 All applicants are required to demonstrate that they can perform the following tasks:

- a) Prepare list of documents or an affidavit of documents
- b) Request and produce/disclose documents
- c) Draft brief

3.3. TRANSACTIONAL/ADVISORY MATTERS

3.3.1 Applicants for admission to the Chambre des notaires du Québec are required to demonstrate that they can perform the following tasks:

- a) Conduct basic commercial transaction
- b) Conduct basic real property transaction
- c) Incorporate company
- d) Register partnership
- e) Draft corporate resolution
- f) Maintain corporate records
- g) Draft basic will
- h) Draft personal care directive
- i) Draft powers of attorney