

## **WORKSHEET X**

### **INTRODUCTION TO OFFICE PERSONNEL**

Objective: Discuss the roles and responsibilities of paralegals, administrative assistants, and other office personnel and how to establish good working relationships with support staff, colleagues, and senior lawyers.

- Explain to your mentee each employee's role in the mentor's office/firm, including the employee's title, job duties, and relationship to the new lawyer (if any) if in an in-house mentoring relationship.
- Discuss the importance of having support staff on your team and treating them with respect.
- Share suggested "do's and don'ts" of dealing with support staff, colleagues, and those more senior than your mentee.
- If the new lawyer has an administrative assistant and/or paralegal, explain the types of tasks that are appropriate (and inappropriate) to ask each of them to do.
- If in an in-house mentoring relationship, discuss the office culture in terms of the types of tasks new lawyers are expected (although perhaps not told) to do rather than support staff. For example, if in an office where many lawyers share one administrative assistant, do the newer lawyers make their own changes to documents, make their own copies, etc. so that the administrative assistant can focus on doing those tasks for the more senior lawyers? Are new lawyers expected to type their own documents on their own computer and assistants expected to "format" them, or is there some other accepted way of doing things?
- If in an in-house mentoring relationship, discuss any considerations or prohibitions in asking support staff to put in time outside of normal office hours, including whether requests for overtime must be approved, whether overtime requests must only be made on a limited basis, how much advance notice is typically expected when asking staff to stay later than normal office hours, etc.
- If in an in-house mentoring relationship, discuss the specific skills and knowledge each support staff member has from which your mentee can learn or benefit.

**WORKSHEET X**  
**INTRODUCTION TO OFFICE PERSONNEL**

- Make suggestions about how to handle difficult situations where your mentee’s administrative assistant or paralegal is not performing as expected. If mentoring in-house, explain any procedures that are in place to address this type of problem.
- Discuss the types of behavior that constitute the unauthorized practice of law in Ohio and, to the extent possible, define the “practice of law.” *See* the attached *Columbus Bar Assn. v. Thomas*, 109 Ohio St.3d 89 (2006).
- Discuss an attorney’s ethical responsibilities regarding non-lawyer assistants. *See* Prof. Cond. Rule 5.3.
- Discuss an attorney’s ethical obligation to prevent the unauthorized practice of law and provide specific tips on how to prevent non-lawyer personnel from inadvertently (or intentionally) engaging in it. *See* Prof. Cond. Rules 5.3–5.5.
- If mentoring in-house, discuss the office policies (if any) that are in place to prevent the unauthorized practice of law by non-lawyer staff.
- Share with your mentee appropriate ways to monitor the work product of support staff which your mentee is ultimately responsible for as an attorney.