



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Guide And Refer Clients In Terms Of Legal Enquiries Training

Law, Military Science and Security / Justice in Society

Unit Standard 119509 · NQF Level 5 · 10 Credits · 7 Days

COURSE OVERVIEW

This course equips participants with the skills to guide and refer clients in legal enquiries within a South African context. Learners will develop the ability to identify legal issues, provide appropriate information, and refer clients to qualified legal professionals or resources, ensuring compliance with relevant legislation and ethical standards.

Category	Law, Military Science and Security
Subfield	Justice in Society
Unit Standard	119509
Accreditation	SAQA Accredited · NQF Level 5 · 10 Credits
Duration	7 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply knowledge of the South African legal system to identify common legal enquiries.
- Analyse client queries to determine the scope and limitations of advice that can be provided.
- Demonstrate appropriate referral procedures to legal professionals or support services.
- Implement communication strategies to manage client expectations and maintain confidentiality.
- Evaluate ethical considerations and legal boundaries when guiding clients in legal matters.
- Design a personal action plan for continuous improvement in handling legal enquiries.

WHO SHOULD ATTEND

- This course is designed for customer service representatives, front-line staff, and advisors who interact with clients requiring legal guidance as part of their role.

COURSE OUTLINE

Day 1: Introduction to Legal Enquiries and the South African Legal System

- Overview of the South African legal system.
- Sources of law: Constitution, legislation, common law, case law.
- Key legal terms: plaintiff, defendant, affidavit, summons.
- The hierarchy of courts: Magistrates, High Court, Supreme Court of Appeal, Constitutional Court.
- Introduction to legal aid and pro bono services.
- Ethical considerations when handling legal enquiries.
- Client rights and responsibilities in legal matters.

Day 2: Understanding Client Needs and Legal Issues

- Techniques for effective client interviews.
- Common legal enquiries: divorce, child maintenance, unfair dismissal, debt collection.
- Assessing legal needs: urgency, jurisdiction, and limitation periods.
- Informed consent and confidentiality requirements.
- Documenting client information accurately.
- Recognising when a matter is beyond your scope and requires referral.

Day 3: Referral Networks and Resources

- Types of legal service providers: private attorneys, Legal Aid SA, university law clinics.
- Community advice offices and paralegal services.
- Creating a referral directory: criteria for inclusion.
- Referral protocols: when to refer and how to hand over.
- Networking with legal professionals.
- Referral documentation and follow-up procedures.
- Ethical issues in referrals: conflicts of interest, fees, and kickbacks.

Day 4: Legal Documentation and Record-Keeping

- Standard referral forms and templates.
- Client intake and consent forms.
- Record-keeping systems: manual and electronic.
- Protection of Personal Information Act (POPIA) compliance.
- Writing referral letters and summaries.
- Confidentiality in documentation.
- Filing and retrieval procedures.

Day 5: Communication and Interpersonal Skills for Legal Referrals

- Communication barriers: language, culture, literacy.
- Techniques for explaining legal procedures simply.
- Managing expectations: timelines, costs, outcomes.
- Dealing with distressed or aggressive clients.
- Cross-cultural communication in legal contexts.
- Role-play exercises: client consultations.
- Feedback and reflection on communication skills.

Day 6: Legal Ethics and Professional Boundaries

- Ethical framework: integrity, honesty, confidentiality.

- Unauthorised practice of law: what you can and cannot do.
- Professional boundaries: dual relationships, self-disclosure.
- Code of conduct for paralegals and legal advisors.
- Handling conflicts of interest.
- Reporting unethical behaviour.
- Case studies on ethical dilemmas.

Day 7: Integration, Assessment, and Action Plan

- Review of key concepts from Days 1-6.
- Simulated scenario: client with a complex legal enquiry.
- Step-by-step referral process: assess, refer, follow up.
- Summative assessment: written test and practical role-play.
- Feedback and improvement strategies.
- Creating a professional development plan.
- Resources for continued learning: SAQA, legal journals, workshops.
- Course evaluation and certification.

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **10 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 29,600.00	R 29,600.00
1	In-House	R 38,500.00	R 38,500.00
1	On-Campus (Pretoria)	R 44,400.00	R 44,400.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	18 Aug 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	19 Aug 2026	On-Campus	Abu Dhabi, UAE
12 Aug 2026	20 Aug 2026	On-Campus	Durban, South Africa
12 Aug 2026	20 Aug 2026	On-Campus	Mauritius
13 Aug 2026	21 Aug 2026	On-Campus	Cape Town, South Africa
14 Aug 2026	24 Aug 2026	On-Campus	Dubai, UAE
17 Aug 2026	25 Aug 2026	On-Campus	Abu Dhabi, UAE
18 Aug 2026	26 Aug 2026	On-Campus	Durban, South Africa

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 119509) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call +27 12 004 8389 or WhatsApp +27 65 077 6310 and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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