Note: unless noted otherwise, all reports mentioned in these notes can be found in LawStream's Accounting tab.

Practice Declaration

You will need to organize and categorize your files in accordance with areas of law defined by the Law Society; to help organize areas, look at the File/Matter tab → lists of file → edit/manage areas of law, to see how you can establish areas of law, and how you can assign areas of law to files in your office

To generate the report showing the allocation of your practice to different areas of law, select this report: other reports and processes → management → select special report → file-type productivity (sort by three-character file-type, and specify date range for the reporting period)): once that report has been generated, you will be able to see the amounts of time for each area of law, which should be valid (after rounding to the nearest per cent) for providing this information; this report reviews all the time, disbursement and accounting data for all files for the reporting period, so you should expect it to take several minutes to complete; note that this report includes totals by area of law, for "recorded hours", "billable hours", and "billed hours" for each area of law; if you find that there are totals in a section near the top, without any reference to an area of law, it likely means that you have failed to assign an area to some of your active files; note, too, that LawStream does not include percentages in this report, as those percentages could be misleading (for Practice Declaration purposes) if you record time for files that are not included in the ones shown on this list (e.g., CLE time or office administration time))

Professional development: although you might not yet have a file for recording your professional development time, it would be a good idea to open one, as it would let you record time spent (both formally and informally), and it could also be used for scheduling CLE courses

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