

DUTY STATEMENT

State Compensation Insurance Fund

Employee's Name:	
Program: Corporate Legal Department	Work Unit:
Position's Authorized Classification (and Range): Legal Secretary	Report To: Legal Support Supervisor I
Position Title: Legal Secretary	Position Serial #:
Incumbent Appointment Classification (and Range) Legal Secretary (Range A or B)	CBID: R04
	FLSA Status: <input checked="" type="checkbox"/> Covered, Work Week Group 2 <input type="checkbox"/> Not Covered, Exempt WWG <input type="checkbox"/> E or <input type="checkbox"/> SE

PURPOSE/SCOPE:

Under general supervision the Legal Support Supervisor I, independently perform the full range of legal secretarial work including the most difficult and complex secretarial work for at least two or more attorneys or Assistant Chief Counsel relating to:

- The proper processing of court filings and legal documents primarily in multiple courts or jurisdictions according to jurisdictional requirements (including but not limited to Federal, State, and appellate courts or Office of Administrative Hearings)
- The coordination of court-related services in legal programs with Attorneys
- Serving as a lead person to other clerical staff including Senior Legal Typists and may also serve as back-up to the assigned supervisor in a non-supervisory capacity

Supervisor's Statement: I have discussed the duties of the position with the employee		
Supervisor's Name (Print):	Supervisor's Signature:	Date:
Employee's Statement: I have discussed with my supervisor the duties of the position and have received a copy		
Employee's Name (Print):	Employee's Signature:	Date:

KEY RESULT/ESSENTIAL FUNCTIONS:

In all aspects of the performing the Key Results/Essential Functions, the incumbent will:

- Establish and maintain effective working relationships and uphold principles of integrity in the workplace
- Provide quality customer service in a timely manner
 - Take “ownership” of each customer contact to address needs and endeavor to meet State Fund objectives
 - Help in the retention of all State Fund Customers as appropriate
- Follow State Fund’s Equal Employment Opportunity principles
- Maintain a safe working environment
- Defend State Fund against fraudulent activities
- Comply with the Code of Conduct
- Maintain regular and predictable attendance and/or communication availability during working hours

35%

- 1. Prepare (type, format, edit from draft, and process (file and serve) a variety of documents (medicals, exhibits, briefs, motions, notices, petitions, depositions, etc.) primarily in multiple courts or jurisdictions. (This is an essential function of the job)**
 - a. Type, format, edit or transcribe from draft reports of hearings, interviews and general correspondence for attorneys according to jurisdictional requirements.
 - b. Review all documents for accuracy to ensure that they are typed, proofread, copied, and file/serve in accordance with proper formatting and procedures.
 - c. Prepare various spreadsheets as directed by assigned attorney or supervisor.
 - d. Create, upload into case management system, maintain and archive (if needed) an electronic and/or physical file to preserve documents related to a specific case in accordance with office procedure.
 - e. Ensure timely filing of briefs/documents in proper venue(s).

25%

- 2. Coordinate and schedule/calendar court related matters (and/or services) in compliance with jurisdictional requirements. (This is an essential function of the job)**
 - a. Coordinate
 - i. With the applicant’s/defendant’s attorney, the court reporter and if necessary the interpreter to schedule/calendar depositions.
 - ii. With courts, co-counsel, opposing counsel or witnesses to obtain necessary information.
 - iii. Availability of all parties, facilities, and equipment necessary to schedule meetings or conduct interviews, depositions and conference calls.
 - b. Locate and contact court reporter and/or videographer by phone, e-mail and/or letter for scheduled hearing or deposition.
 - c. Maintain Attorney’s calendar to assist the attorneys and legal staff by providing a visual record of the attorney’s hearings, vacations, private meetings, interviews, etc.
 - d. Prioritize work product in order to comply with strict Court/Discovery Litigation requirements.
 - e. May prepare travel arrangements for attorneys to produce an itinerary for a trip.

10%

3. Finalize documents for attorneys in preparation for litigation or other proceedings.

(This is an essential function of the job)

- a. Assemble exhibits and discovery documents.
- b. Generate and mark tables of authorities.
- c. Check case citations and verify quoted text.
- d. Upload court documents on case management system so that authorized staff from other functional units can access the documents.
- e. Organize and assemble extremely sensitive and confidential materials for trial exhibits.
- f. Obtain documents from the court or if not found, search the current case management systems.
Electronically file documents and pleadings in the appropriate court(s), according to court rules and requirements; use of legal resources from traditional library references and software application (Including but not limited to: EAMS/File Net/True Filing).
- g. May be instructed to obtain information on restitution cases from the District Attorney's office or Probation Department.
- h. Make sure that the legal forms are filled out correctly with the case name/number, and in cases involving restitution, the restitution ordered amount and the date are entered correctly on the forms.
- i. Review outgoing legal correspondence to ensure all legal documents and enclosures are in proper order and sent to the appropriate parties.

10%

4. Handle telephone and electronic communication to determine the necessary course of action and/or provide quality customer service on a daily basis.

(This is an essential function of the job)

- a. Place calls to clients, opposing counsel, plaintiffs, courts, etc to obtain necessary information or to respond to inquiries which may involve the interpretation of policies and procedures.
- b. Using good judgment and discretion, screen incoming calls to determine the necessary course of action to be taken utilizing the telephone on a daily basis.
- c. Direct incoming calls to the appropriate staff member to provide quality customer service on a daily basis.

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5. Process incoming mail timely.

(This is an essential function of the job)

- a. Open and date stamp incoming mail to verify the date received in the office on a daily basis.
- b. Research incoming mail to identify the proper attorney assigned to the case, manager, or other legal staff.
- c. Maintains user mastery over State Fund's computer based technology.
- d. Route incoming mail to appropriate staff and/or Claims Processing Center (CPC).

6. Serve as a lead person to other clerical staff including Senior Legal Typists and serve as back up for the Legal Support Supervisor in non-supervisory tasks.

- a. Assist with training for other Legal Secretaries and Senior Legal Typists on an as-needed basis regarding clerical and legal office procedures.
- b. Serve as a source of information and mentor for Senior Legal Typist and other support staff to handle inquiries of a more complicated nature or any issues requiring confidentiality.

REQUIRED QUALIFICATIONS/COMPETENCIES (KNOWLEDGE, SKILLS/ABILITIES):

KNOWLEDGE AREAS:

- Proficient knowledge of the legal procedures and practices for preparing, formatting, filing and serving legal documents in multiple courts or jurisdictions (including, but not limited to State, Federal, Appellate courts and Office of Administrative Hearings) to meet specific court requirements/mandates and legal deadlines.
- Proficient knowledge of modern office methods, supplies and equipment.
- Proficient knowledge of Business English and correspondence in order to proofread and effectively communicate with staff and others.
- Working knowledge of various legal software programs and State Fund standard software applications.
- Knowledge of the judicial process as it relates to multiple specialized areas of law and the ability to interact with courts, administrative agencies, governmental entities, co-counsel, opposing counsel, or witnesses as directed by the attorney ensuring deadlines are met.

SKILLS/ABILITIES:

- Ability to correct grammar, spelling and punctuation errors in work product to ensure professional appearance of documents.
- Ability to give information and provide assistance using good judgment and discretion.
- Ability to maintain case and administrative files and records.
- Ability to act in a lead capacity over other Legal Secretaries and Senior Legal Typists.
- Ability to type at least 45 words per minute.
- Ability to independently perform complex clerical and legal secretarial work.
- Ability to coordinate and schedule legal services.
- Ability to screen mail, visitors and telephone calls and take appropriate action.
- Ability to correct grammar, spelling and punctuation errors in work product to ensure professional appearance of documents.
- Ability to give information and provide assistance using good judgment and discretion.
- Ability to maintain case and administrative files and records.
- Ability to act in a lead capacity over other Legal Secretaries and Senior Legal Typists.

WORK ENVIRONMENT

Physical Requirements:

- Computer data entry, frequent light lifting, bending, reaching, carrying, and telephone work; mobility to various working areas

Travel:

- May travel to various work sites and locations for training and/or meetings.
- Travel may occasionally be for extended periods and may include travel by air or ground.

Work Hours

- May occasionally require work in evenings and on weekends.