**Duty Statement**

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| **POSITION BEING FILLED (CLASSIFICATION):** | **Legal Secretary** |
| **WORKING TITLE:** |  |
| **POSITION NUMBER:** | **400-112-1282-057**  **400-112-1282-055**  **400-112-1282-012**  **400-112-1282-044** |
| **DIVISION:** | **Office of the Director Legal Unit** |
| **LOCATION:** | **Oakland** |
| **FORM 1#:** | **004876**  **004877**  **004878**  **004879** |

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| **TENURE:** | **Permanent** |
| **TIME BASE:** | **FULL TIME** |
| **WWG:** | **2** |
| **CBID:** | **R04** |
| **WORK SCHEDULE:** | **MONDAY - FRIDAY** |
| **WORKING HOURS:** | **8:00 am -5:00 pm (one hour lunch)** |

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| **CONFLICT OF INTEREST FILING (FORM 700)** | REQUIRED  NOT REQUIRED |

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| **GENERAL STATEMENT** |
| Under the general supervision of the Legal Support Supervisors I and II, Legal Secretaries in the Department of Industrial Relations Office of the Director Legal Unit (“OD Legal”) perform a wide variety of legal secretarial work, including typing, formatting, filing and serving legal pleadings in multiple jurisdictions, including in the administrative workers’ compensation system, state and federal courts, the Courts of Appeal, other appellate courts, and the State Personnel Board. Legal Secretaries typically support the work of two to four attorneys and an investigator. All Legal Secretaries in OD Legal perform calendaring, filing, and other legal secretarial work for the workers’ compensation cases that are handled by OD Legal attorneys (representing the Director of the Department of Industrial Relations as Administrator of the Uninsured Employers Benefits Trust Fund (UEBTF), Subsequent Injuries Benefits Trust Fund (SIBTF), and Death Without Dependents fund (DWD). Legal Secretaries also provide support in civil litigation and other practice areas of the attorneys to which they are assigned. |

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| **% OF DUTIES** | **ESSENTIAL FUNCTIONS** |
| **40%** | Using Microsoft Word, assist attorneys in the typing, formatting, proofreading, and finalizing of pleadings, correspondence, court forms, and other documents for legal proceedings. Review court rules for formatting, page limits, and other requirements, and ensure court pleadings comply. Mark and generate tables of contents and tables of authorities for pleadings and briefs. File and serve pleadings, briefs, and submissions in various courts, including in workers’ compensation district offices (electronically filed through EAMS), and in state and federal courts. Maintain and update as necessary service lists and official address records for pending matters. Draft routine correspondence as requested, and assist attorneys with finalizing and mailing of more complex correspondence and other documents. Assist in the preparation of pre-trial submissions, trial exhibits, and other trial materials. Serve discovery requests and responses. |
| **35%** | Handle calendaring for court appearances, court filings, depositions, and all other case events and due dates by using Filemaker, coordinating with the attorneys’ Microsoft Outlook, and using other calendaring programs. Maintain and ensure up-to-date calendars for the workers’ compensation “Boards” handled by the attorneys to which the Legal Secretary is assigned. Handle intake of new cases and prepare new case files (in the SIBTF, UEBTF and DWD cases). Handle all paper filing for case files, and ensure case files are up-to-date and prepared for attorneys in advance of court appearances. Review and process all incoming mail for attorneys, including by reviewing for hearing notices and other scheduled dates and calendaring as necessary. Forward medical records and other materials as appropriate to the UEBTF or SIBTF claims examination units. Assist attorneys as necessary and as requested with all outgoing mail. Answer telephone calls and inquiries from opposing counsel, co-counsel, department clients, parties, and members of the public, as necessary. |
| **10%** | Set up depositions, including by arranging for a venue, court reporter and interpreter, if necessary. Set up and arrange for Court Call and other telephone appearances. Assist attorneys in scheduling and coordinating meetings or other group events, reserving conference rooms, and securing any necessary equipment. |
| **5%** | Assist in closing case files, including by completing case closure forms, scanning files for archiving on servers, or by shredding files for disposal. |
| **5%** | Make travel arrangements for attorneys using the State travel website (Concur), and assist attorneys in the submission of travel expense reimbursement claims using the State reimbursement website (CalAters). |
| **5%** | Other duties as assigned, including filling in at the OD Legal front desk when necessary, filling in for other staff who are out, attending trainings, and otherwise assisting OD Legal attorneys and staff with clerical, organizational and administrative needs. |

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| **CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS** |
| This position requires the incumbent to maintain regular, predictable and reliable attendance, and to adhere to attendance and leave policies. This position also requires the ability to communicate effectively and professionally orally, in writing, and on the telephone, with members of the public, other employees in OD Legal and DIR, and others who may call or visit the office. A positive and friendly attitude, attention to detail, flexibility, and willingness to learn are necessary. Incumbents will be required to develop knowledge and skill related to specific tasks, complete assignments in a timely and efficient manner, and adhere to department policies and procedures. OD Legal strives for a collegial environment, and all employees are expected to treat each other with courtesy and respect. |

**EMPLOYEE ACKNOWLEDGEMENT**

I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgement, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties as described above with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation inform the hiring supervisor, who will discuss your concerns with the Office of Civil Rights).

**Print Employee Name Employee Signature Date**

**SUPERVISOR ACKNOWLEDGEMENT**

I certify this duty statement represents current and an accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.

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**Print Supervisor Name Supervisor Signature Date**