

LEGAL
[Name of Function]
JOB DESCRIPTION

**The sub responsibilities listed for Each Key Result Area/Responsibility statement are suggestions. Please edit or remove the suggested sub responsibilities as necessary for the specific Legal function, or add additional sub responsibilities.*

EMPLOYEE: _____

ORACLE POSITION TITLE (OPT): Legal Analyst

WORKING TITLE: Legal Analyst

AUTHORIZED CLASSIFICATION: Legal Analyst

INCUMBENT CLASSIFICATION: _____

CBID: R01.

FLSA STATUS: Covered, Work Week Group 2.

WORK UNIT: _____

REPORT TO: _____

FUNCTION:

Under general supervision, provide paralegal and legal analytical support to assigned attorney(s):

- Conduct research and analysis of legal issues
- Assist attorneys with case preparation and execution (before trial) including drafting and/or responding to pleadings, discovery documents, and motions for attorney review
- Assist attorneys with case finalization, trials, and administrative hearings
- Complete administrative and operational duties

In all aspects of the performance of these duties, 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 work environment
- Defend State Fund against fraudulent activities
- Maintain regular and predictable attendance and/or communication availability during working hours

KEY RESULT AREAS:

30% 1. Conduct research and analysis of legal issues

30% 2. Assist attorneys with case preparation and execution (before trial) including drafting and/or responding to pleadings, discovery documents, and motions for attorney review

30% 3. Assist attorneys with case finalization, trials, and administrative hearings

10% 4. Complete administrative and operational duties

100%

ASSIGNED EQUIPMENT:

Building Key Card/I.D. Card, computer, telephone, and other general office equipment.

WORKING CONDITIONS:

Computer data entry activities, telephone work, light lifting or reaching, occasional bending, and mobility to various work areas. Position requires occasional overnight travel to attend meetings, trials, and and/or hearings.

AUTHORITY:

1. To prioritize and expedite completion of work in accordance with established policies and procedures of the legal office
2. To communicate with the Legal community, State Fund Legal staff and programs, and parties involved in legal cases to accomplish Key Result Areas
3. To contact Legal vendors and parties involved in cases by telephone, e-mail, and through written correspondence
4. To make appropriate informational inquiries to other State Fund programs and Legal venues
5. To report any constant difficulties that prevent completion of assigned duties to immediate supervisor
6. To report any computer malfunctions to IT

CUSTOMER RELATIONSHIPS:

Establish and maintain effective working relationships with State Fund's Directors, Officers, Managers, Attorneys, employees, and representatives, State Fund's retained experts, and past and present policyholders (as assignments require).

RESPONSIBILITIES:

1. **Conduct research and analysis of legal issues**
(This is an essential function of the job)
 - a. Analyze case documents to identify existing and potential legal and factual issues
 - b. Research and analyze legal sources such as statutes, judicial decisions, legislation, regulations, legal articles, and other sources to address legal issues
 - c. Collaborate with attorney(s) to formulate and implement investigation/discovery plan for critical issues
 - d. Research local, federal, State, and administrative court rules
 - e. Review files and records to summarize for assigned attorney(s)
 - f. Assist attorneys in drafting legal memoranda relating to client requests for legal services and advice
 - g. Assist assigned attorney(s) in witness interview preparation and witness interviews
 - h. Assist in the filing of pleadings and other legal documents
2. **Assist attorneys with case preparation and execution (before trial) including drafting and/or responding to pleadings, discovery documents, and motions for attorney review**
(This is an essential function of the job)
 - a. Draft allegations and statements of issues to support State Fund's case
 - b. Draft pleadings and motions including, but not limited to; complaints, answers, notices, and declarations to support legal arguments
 - c. Draft responses to discovery documents including interrogatories, document production, request for admissions, declarations, subpoenas, etc.
 - d. Assist in preparation of documents to respond to subpoenas and requests for production of documents

- e. Prepare summaries of discovery results to facilitate case development
- f. Gather and review documents that relate to identified issues
- g. Monitor status of discovery requests, motions, and responses
- h. Update and maintain the calendar of case activities to provide a visual record of the motion and discovery deadlines, court hearings, deposition dates, etc.
- i. Update all matter records in TeamConnect or other case management system, as directed
- j. Document and file all conversations, discussions, and other oral communications promptly
- k. Draft correspondence for attorney review
- l. Ensure the proper and prompt filing of all received correspondence and pleadings

3. Assist attorneys with case finalization, trials, and administrative hearings
(This is an essential function of the job)

- a. Draft legal memoranda summarizing transcripts, evidence, exhibits, statements, etc. for review and/or use by assigned attorney(s) and/or Senior Legal Analyst
- b. Assist in the preparation of evidence and witnesses as directed by attorney(s)
- c. Serve as liaison to manage on-call State Fund witnesses
- d. Attend hearings and meetings to assist assigned attorney(s), as directed
- e. Summarize trial/hearing transcripts to identify remaining and new legal issues
- f. Assemble/prepare exhibits for law and motion hearings, mediation, arbitration, trials, post trial hearings/briefs, motions for reconsideration, etc., as directed
- g. Draft settlement agreements, as directed

4. Complete administrative and operational duties
(This is an essential function of the job)

- a. Timely complete all required State Fund training
- b. Assist clerical staff in handling work related issues, as directed
- c. Participate on committees and special projects, as assigned
- d. Complete all required administrative documentation promptly

KNOWLEDGE, SKILLS AND ABILITIES:

- Proficient knowledge of the English language, including grammar, diction, syntax, punctuation, spelling, vocabulary, and sentence and paragraph structure
- Working knowledge of basic legal concepts, terminology, principles, documentation, and procedures to conduct paralegal duties
- Working knowledge of the appropriate use of discovery tools including, but not limited to: motions, affidavits, interrogatories, document requests, subpoenas, depositions, requests for admissions, and other judicial council forms
- Working knowledge of State Fund's business operations and organizational structure
- Working knowledge of computer programs (e.g. Word, Excel, Outlook, Power Point, Adobe Acrobat, TeamConnect, LexisNexis) in order to perform duties
- Working knowledge of legal case management
- Working knowledge of legal and ethical principles that guide paralegal conduct, including unauthorized practices of law, lawyer supervision of non-lawyers, confidentiality, attorney-client privilege, and conflicts of interest
- Working knowledge of Federal, State, and administrative court systems to file pleadings and other legal documents
- Working knowledge of the use of legal reference and research materials, including on-line legal and court resources available at State Fund
- General knowledge of the California Code of Civil Procedure, local court rules for California Superior Courts, Federal Rules of Civil Procedure, and the administrative hearing procedures for the California Department of Insurance (CDI) and the Workers' Compensation Appeals Board (WCAB)
- General knowledge of the CA workers' compensation market, rules, and regulations
- Skill to logically analyze complex information to assist assigned attorney(s)
- Skill to read and understand technical documents and information such as insurance policies, claims files, medical reports, accounting records, and contracts
- Skill to utilize on-line software and legal research tools to complete assignments
- Skill to conduct research and analysis of legal issues
- Skill to apply rules found in the California Style Manual and/or the Blue Book to ensure proper formatting of legal documents
- Skill to read and understand legal documents such as statutes, court decisions, pleadings, motions, discovery, and legal research
- Skill to identify, research, interview, and coordinate with witnesses to obtain information
- Skill to draft correspondence and legal documents/memoranda
- Skill to prepare documents and exhibits for law and motion hearings, mediation, arbitration, trials, post trial hearings/briefs, motions for reconsideration, etc.
- Skill to evaluate the validity/reliability of information
- Ability to analyze situations to provide and support recommended course of action
- Ability to communicate effectively, orally and in writing, using proper English
- Ability to handle stressful situations in a professional manner
- Ability to behave ethically
- Ability to work effectively with internal and external stakeholders
- Ability to manage and prioritize multiple assignments
- Ability to maintain the confidentiality of information
- Ability to identify factual omissions and inconsistencies
- Ability to identify interrelationships among cases, statutes, regulations, and other legal authorities
- Ability to identify evidentiary, material, and controlling facts
- Ability to identify, construct, and evaluate logical arguments

Employee Signature

Date Employee Received Copy