

## DUTY STATEMENT

## State Compensation Insurance Fund

<b>Employee's Name:</b>	
<b>Program:</b> Legal Operations	<b>Work Unit:</b> Legal Operations
<b>Position's Authorized Classification (and Range):</b> Legal Secretary	<b>Report To:</b> Legal Support Supervisor I or Legal Support Supervisor II
<b>Position Title:</b> Legal Secretary	<b>Position Serial #:</b>
<b>Incumbent Appointment Classification (and Range):</b> Legal Secretary	<b>CBID:</b> R04
	<b>FLSA Status:</b> <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 the general supervision of the Legal Support Supervisor I or Legal Support Supervisor II, the Legal Secretary works in a secretarial capacity, independently performing the full range of legal secretarial work, including the most challenging and complex secretarial work for at least two or more attorneys or Assistant Chief Counsel.

<b>Supervisor's Statement:</b> I have discussed the duties of the position with the employee		
Supervisor's Name (Print):	Supervisor's Signature:	Date:
<b>Employee's Statement:</b> 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 RESULTS/ESSENTIAL FUNCTIONS:**

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

- Comply with the Code of Conduct.
- Maintain regular and predictable attendance and/or communication availability during working hours.
- Maintain a safe working environment.
- Defend State Fund against fraudulent activities.
- Maintain good customer relationships with internal and external business partners and stakeholders.
- Properly maintain assigned equipment.
- Follow the principles of the State Fund's Equal Employment Opportunity guidelines.
- Attend and participate in all essential training.

*The statements contained in this duty statement reflect the general details as necessary to describe the principal results/functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other or specific functional areas.*

### **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 the assigned attorney or supervisor.
- d. Create, upload into case management/claims management system, maintain and archive (if needed) an electronic to preserve documents related to a specific case in accordance with office procedure.
- e. Ensure timely filing of briefs/documents in proper venue(s).
- f. Redact Personal Identifiable Information from documents when needed.

### **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 Certified Shorthand Reporter 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.

10%

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

(This is an essential function of the job)

- a. Assemble trial exhibits and discovery documents.
- b. Generate and mark tables of authorities.
- c. Check case citations and verify quoted text.
- d. Upload court documents in the case management system so that authorized staff from other functional units can access the documents.
- e. Organize and assemble extremely sensitive and confidential trial exhibits.
- f. Obtain documents from the court, or if they are not found, search the current case/claims 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.

- g. May be instructed to obtain information on restitution cases from the District Attorney's office.
- 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 contribute to Management Team, Business Continuity, Threat Management, corporate committees.** (This is an essential function of the job)

- a. Place calls to clients, opposing counsel, plaintiffs, courts, etc., to obtain the necessary information or to respond to inquiries that 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 daily.
- c. Direct incoming calls to the appropriate staff member to provide quality customer service daily.

10%

**5. Process incoming mail, email, phone calls and faxes timely.** (This is an essential function of the job)

- a. Research incoming mail, email, phone calls and faxes to identify the proper attorney assigned to the case, manager, or other Legal professional.
- b. Maintains user proficiency over State Fund's computer-based technology.
- c. Route incoming mail, faxes and phone calls to appropriate staff and/or Department.

**10%**

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

(This is an essential function of the job)

- 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 the Senior Legal Typist and other support staff to handle inquiries of a more complicated nature or any issues requiring confidentiality.

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**100%**

**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 to proofread and effectively communicate with staff and others.
- Working knowledge of State Fund's computer-based technology
- Knowledge of the judicial process related 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 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 aid 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.
- Occasional lifting up to 20 lbs.

**Travel:**

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

**Emergency call backs:**

- Not Applicable

**Work Hours:**

- May occasionally require work in the evenings and on weekends.

## DUTY STATEMENT

## State Compensation Insurance Fund

<b>Employee's Name:</b>	
<b>Program:</b> Legal Operations	<b>Work Unit:</b> Legal Operations
<b>Position's Authorized Classification (and Range):</b> Senior Legal Typist	<b>Report To:</b> Legal Support Supervisor I
<b>Position Title:</b> Senior Legal Typist	<b>Position Serial #:</b>
<b>Incumbent Appointment Classification (and Range):</b>	<b>CBID:</b> R04
	<b>FLSA Status:</b> <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 the general supervision of the Legal Support Supervisor I or II, independently provide the full range of Senior Legal typist (SLT)- secretarial and administrative tasks in support of two or more Attorneys, Lien Representatives, Legal Analysts, or other professional staff, as assigned. The incumbent must be able to work in a team environment, have strong communication skills, work well under pressure and meet short deadlines. The SLT duties include:

- The proper processing of court filings and legal documents in multiple courts or jurisdictions (including but not limited to: Federal, State, or Appellate Courts and/or Administrative Courts or Agencies.
- The coordination of court-related services in Legal programs with Attorneys, Lien Representatives, Legal Analysts or other professional staff as assigned.
- Serving as a lead person to other clerical staff or serve as back-up to the assigned supervisor in a non-supervisory capacity.

<b>Supervisor's Statement:</b> I have discussed the duties of the position with the employee		
Supervisor's Name (Print):	Supervisor's Signature:	Date:
<b>Employee's Statement:</b> 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 RESULTS/ESSENTIAL FUNCTIONS:**

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

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and/or communication availability during working hours.
- Maintain a safe working environment.
- Defend the State Fund against fraudulent activities.
- Maintain good customer relationships with internal and external business partners and stakeholders.
- Properly maintain assigned equipment.
- Follow the principles of State Fund's Equal Employment Opportunity guidelines.
- Follow State Fund's cybersecurity and privacy practices.
- Maintain compliance with all State Fund's mandatory training.

*The statements contained in this duty statement reflect the general details as necessary to describe the principal results/functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other or specific functional areas.*

**30%**

**1. Prepare (type, format, edit from draft, review, organize) and process (file and serve) legal correspondence and documents (pleadings, briefs, motions, notices, petitions, depositions, trial exhibits, medical records, etc.). May occasionally file and serve to multiple jurisdictions/forums with the assistance from a Legal Secretary or Legal Support Supervisor.**

(This is an essential function of the job)

- a. Type, format, edit, or transcribe from drafts hearings, interviews, and general correspondence for Legal professionals according to jurisdiction requirements.
- b. Review all documents for accuracy and ensure that they are typed, proofread, copied, and filed/served in accordance with proper format and procedure, Electronic Adjudication Management System (EAMS) regulations and E-filing procedures.
- c. Finalize drafts of legal documents and general correspondence.
- d. Prepare various spreadsheets as directed by Legal professionals or supervisor.
- e. Create, upload into case management system, maintain and archive (if needed) an electronic and/or physical file(s) to preserve documents related to a specific case in accordance with office procedure.
- f. Ensure timely filing of brief/documents in proper venue(s).
- g. Timely and appropriately delivering Finding and Awards, Finding and Orders, and Decisions on Reconsideration to the appropriate Legal professional pursuant to Department procedures and/or in conformity with the Legal Reference Manual.
- h. Process Petitions, Notice of Intents, and Orders to serve medicals to appropriate parties.

**30%**

**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 appropriate Legal professionals, both within and external to State Fund and, the court reporter and, if necessary, interpreter(s) 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 by phone, e-mail and/or letter for scheduled hearing or depositions.

- c. Maintain Legal professional's calendar to assist the attorneys and legal staff by providing an accurate record of the assigned Legal professional's hearings, vacations, private meetings, interviews, etc.
- d. Prioritize work product to comply with Court/Discovery regulations and procedures.
- e. May prepare travel arrangements for Legal professionals to produce an itinerary for a trip.

**15%**

**3. Create and maintain files, calendars, and databases.** (This is an essential function of the job)

- a. When necessary, create or organize new litigation files. (This is an essential function of the job)
  - i. Create a litigation file in the legal database when notification is received and/or when needed.
  - ii. Update necessary information and changes including, but not limited to Legal professionals assignment, and case number.
  - iii. Maintain and update legal database by inputting necessary information per the Legal Reference Manual.
  - iv. Update and maintain calendar updates for Legal professionals.
  - v. Timely and accurate processing of new Legal Opens and flipped files in Team Connect

**15%**

**4. Handle telephone communication and process incoming mail, email, faxes timely.**

(This is an essential function of the job)

- a. Answer and facilitate calls by accurately documenting the calls and relaying messages to the appropriate party(ies).
- b. Make calls to assist Legal professionals with case management.
- c. Using good judgment and discretion, screen incoming calls, emails and faxes to determine the necessary course of action to be taken utilizing the telephone and email on a daily basis.
- d. Direct incoming calls, emails and faxes to the appropriate staff member to provide customer service on a daily basis.
- e. Ensure that out of office message and voicemail with personalized greeting is set up and phone calls are returned or acknowledged within 1 working day.
- f. Demonstrate our NorthStar and Everyone Drives Great Experiences (EDGE) principles in interactions with colleagues and internal and external customers.
- g. Make necessary copies of documents, if needed and upload copies to Claims Adjusting and Reporting Engine (CARE.)

**10%**

**5. Perform other duties as assigned by the supervisor.** (This is an essential function of the job)

- a. Process and facilitate procurement of office supplies.
- b. Ensure office supply rooms and storage are equipped and organized.
- c. Maintain and keep a running list of supply items needed daily.
- d. Coordinate with Service/Maintenance Technician in the upkeep of various office equipment.
- e. Process and handle subpoena documents efficiently and timely.
- f. Establish and maintain effective working relationships.
- g. Provide quality customer service in a timely manner and demonstrate State Fund's NorthStar and Edge principles in interactions with colleagues and internal and external customers.
- h. Maintain high level of professional standards and deportment within the State Fund, its insureds, claimants, and the legal community.

**100%**



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

### **KNOWLEDGE AREAS:**

- Proficient knowledge of the legal procedures and practice 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.
- Working knowledge of technical legal terms and various legal forms and documents and their processing.
- Working knowledge of modern office methods, supplies, and equipment.
- Proficient knowledge of Business English and correspondence in order to proofread and effectively communicate with internal and external stakeholders.
- Working knowledge of State Fund's computer-based technology.

### **SKILLS/ABILITIES:**

- Ability to independently correct grammar, spelling and punctuation errors in work product to ensure professional appearance of documents.
- Ability to type, format, file, and serve legal pleadings in the assigned jurisdiction.
- Ability to screen email, faxes, telephone calls, mail, and visitors and take appropriate action.
- Ability to interact with courts, administrative agencies, governmental entities, counsels, opposing counsels, witnesses, as directed by the Legal professional, ensuring deadlines are met and regulations are followed.
- Ability to compose correspondence independently.
- Ability to maintain case and administrative files and records.
- Ability to train, mentor, and/or assist clerical staff including other Senior Legal Typists as needed/requested.
- Ability to type 45 words per minute.
- Ability to demonstrate interest in assuming increasing responsibility, mature judgment, loyalty, poise, tact, and discretion.
- Ability to follow detailed and specific instructions.
- Ability to communicate effectively verbally and in writing.
- Ability to perform difficult clerical work.
- Ability to analyze situations accurately and take effective action.
- Ability to provide effective customer service to internal and external customers in-person and via telephone, email and fax.
- Excellent interpersonal, time management, and organizational skills.
- Ability to independently perform clerical and SLT tasks.
- Ability to ensure deadlines are met.
- Ability to interact with diverse groups and effectively manage multiple projects with competing priorities.

## **WORK ENVIRONMENT**

### **Assigned Equipment:**

- Building key card
- Desktop PC station / computer, monitor, printer, desk phone
- General office equipment

### **Physical Requirements:**

- Computer data entry, frequent light lifting, bending, reaching, carrying, and telephone work; mobility to various working areas.
- Occasional lifting up to 20 lbs.

**Travel:**

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

**Emergency call backs:**

- Not Applicable

**Work Hours:**

- May occasionally require work in the evenings and on weekends.