



## Position Description

**JOB TITLE:** Legal Secretary – Secretarial Center  
(Trainee)

**DATE:** November 2019

**DEPARTMENT:** Secretarial Department

**FLSA STATUS:** Non-Exempt

**OFFICE:** San Francisco

**JOB STATUS:** Regular, Full-time

**REPORTING RELATIONSHIP:** Reports to the Manager of Secretarial and Word Processing Departments; on a day-to day basis, receives assignments from the attorneys, the Secretarial Center’s workflow secretary and other legal secretaries.

**BASIC FUNCTION:** Supports the delivery of quality legal services to clients by providing secretarial and administrative assistance to attorneys, performing complex and specialized litigation and transactional secretarial tasks, and working collaboratively and cooperatively with others in a team-oriented environment. This position supports attorneys when their assigned secretaries are absent or have left for the day and also provides overflow secretarial support. Works with other Secretarial Center secretaries as a team to ensure that all incoming jobs are prioritized and completed expeditiously.

**ESSENTIAL FUNCTIONS:** Regular and predictable attendance is an essential function of the job.

As a trainee, performs the following tasks under the direction of a legal secretary:

**Files Documents with Court:** E-file (and paper file, when applicable) documents with local, state, federal and appellate courts. Research local rules. Prepare documents for filing under seal. Prepare courtesy copies.

**Prepares Documents:** Using the firm’s word processing and document management software, keyboards, prepares and processes correspondence and memoranda as well as complex legal documents according to the requirements set by each court and practice group requiring knowledge of legal terminology and advanced formatting skills. Prepares shell/template documents (including pleadings and discovery) for attorneys. Composes and drafts routine cover letters, emails and documents. Proofreads documents and checks for appropriate formatting, spelling and grammar. Prepares revisions and redlines documents as directed. Coordinates lengthy and complex document preparation with the Word Processing staff as needed.

**Processes Mail:** Reviews, scans, profiles and distributes incoming communications. Prepares and processes outgoing mail, arranges for specialized mail or messenger services as required. Ensures that all attachments, exhibits and enclosures are included. Coordinates activities with the mailroom personnel as needed.

**Maintains Calendar:** Maintains and updates the calendars for assigned attorneys, including meetings, appointments, due dates, and client-related activities. Coordinates specific dates with the Calendar Department as needed.

**Maintains Files:** Responsible for creating and maintaining client files and indexes. Works with the Secretarial Assistant and the Records Department to accomplish this task. Marks case or matter related documents as needed with filing instructions to ensure proper filing. Performs routine filing and retrieves files as needed. Maintains files for assigned attorneys in accordance with firm procedures and policies.

**Coordinates Financial Functions:** Enters attorney timesheets in a timely manner. Prepares expense reimbursement and disbursement requests. Edits bills in online billing system and coordinates client billing matters with the billing staff in the Accounting Department.

**Provides Administrative Support:** Prepares and processes conflicts requests and new matter forms. Coordinates travel arrangements, prepares itineraries, and prepares travel expense reports. Schedules meetings and arranges for conference rooms and meals. Maintains and updates contact names and addresses in the firm's contact database. Communicates effectively with clients and with others in the firm. Is proactive in anticipating the business needs of the attorneys; plans ahead and meets deadlines.

**Cooperates with Team Efforts:** Demonstrates effective teamwork and communication. Follows Center protocol for marking jobs and copying secretary and Center. Provides assistance to other secretaries as time permits. Works cooperatively with other departments and individuals in the firm.

**Other:** Performs other related secretarial and administrative duties as assigned. Overtime work may be required.

**QUALIFICATIONS AND REQUIREMENTS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the education, experience, skills, knowledge and abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

- **Education:** High school diploma or GED required; BA preferred.
- **Experience:** At least one year of experience in administrative support.

**Knowledge, Skills and Abilities:**

- Accurate typing at a net speed of at least 65 words per minute.
- Strong computer proficiency in the use of the MS Office Suite of software (Word, Outlook, and Excel).
- Excellent communication skills, both written and verbal; demonstrated understanding of correct grammar, spelling and punctuation.
- Ability to work effectively within a team environment and to work proactively.

- Strong time management skills and the ability to work under pressure in a fast-paced environment; ability to coordinate multiple tasks concurrently and to meet deadlines.
- Strong organizational skills, interpersonal skills, and attention to detail.

**Level:** Works under close supervision; exercises increasing level of discretion and independent judgment with experience.

**Physical Demands:** The physical demands described here are representative of the requirements that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to handle or feel objects, tools or controls; use a computer keyboard and mouse; reach; talk and listen. The employee is frequently required to move about the office and work at a computer station/desk, as well as to lift and transport objects such as books and files weighing up to 15 pounds. Specific vision abilities required by this position include close vision and the ability to adjust focus.

**Work Environment:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job, including moderate noise level, an indoor temperate environment, and light levels that are bright and conducive to minimal eye strain, typical for an office environment.

**SCOPE OF JOB DESCRIPTION AND MODIFICATIONS:** This job description intends to describe the general nature of the job and does not represent that all such duties will be performed by all individuals who hold the job. This job description does not limit the tasks that an employee may reasonably be requested to perform and in no way alters the firm's at-will employment policy. Substantive changes to this job description may be necessary to meet the changing business needs of the firm. Any substantive revisions to this job description require the approval of the Director of Human Resources.

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