

GENERAL DESCRIPTION OF CLASS

The LEGAL SECRETARY does complex administrative secretarial work for judges, attorneys, investigators, and hearings officers. Duties can include the preparation of legal documents, calendaring, records maintenance, researching legal information, docketing, office management, and coordination with parties or their legal representation.

DISTINGUISHING FEATURES

This is a single classification and not part of a class series.

This class differs from the Office Specialist class series in that it has a greater responsibility to initiate administrative work to relieve the legal professional, and by the specialized knowledge needed to do the work. Some legal secretaries also act as an assistant to one or more legal professionals.

DUTIES AND RESPONSIBILITIES

The duties listed below are not inclusive but characteristic of the type and level of work associated with this class. Individual positions may be assigned all or some combination of the duties listed below as well as other related duties.

1. Administrative Office Duties

Maintain calendars of court or hearing dates, document due dates, filing requirements, court appearances, travel, meetings and related activities. Make travel arrangements and complete necessary forms. Initiate and compose correspondence. Maintain time sheets. Prepare statistical reports. Coordinate and take testimony transcription at trials or administrative hearings. Answer, screen, and route phone calls. Provide information with explanation of applicable process. Maintain a case management system to track legal cases.

Review, prioritize, and distribute incoming mail. Respond orally or in writing to items not requiring legal professional's review or resolution. Calendar or docket case information. Key, proofread and correct draft documents using appropriate format. Schedule and maintain deposition calendars. Coordinate witness and attorney travel arrangements. Schedule court-reporting services.

2. Legal Documents and Correspondence

Transcribe legal documents and correspondence. Determine needed court jurisdiction and format. Type, proofread, and correct draft document. Submit draft for review by legal professional. Prepare final document with revisions and exhibits. Prepare certificates of service, summons, subpoenas, and brief covers. Review document for proper citations. Track flows of and process legal documents before, during, and after the court or hearing date. Prepare official hearing transcript. Apply court rules and regulations to assist attorneys in filing documents. Review documents for accuracy and completeness. Draft simple order for Administrative Law Judge review.

3. Trial or Hearing Preparation and Monitoring

Plan, schedule, and initiate court filing and notices. Examine documents to verify legal steps, deadlines, and due process requirements. Advise legal professional of items needing attention. Establish and maintain a calendaring or docket system to track trial and hearing events.

Coordinate witness appearance. Inform witnesses of new issues as directed by legal professional. Support legal professionals with file information, scheduling and rescheduling. Coordinate and set up expert witness scheduling and payment system. Prepare trial or hearing notebooks, or hearing and mediation files. Open, process and close case files according to established procedures. Obtain missing information from parties to the legal action. Coordinate scheduling of teleconferences for pre- and post-hearing conferences, and mediations.

Read orders to decide case process, correct information, and follow-up when needed.

RELATIONSHIPS WITH OTHERS

The Legal Secretary has daily in-person, electronic, and telephone contact with clients, representatives of opposing parties, court officials, and witnesses regarding case development, coordination, and closure activities.

Employees in this class have regular contact in person, by telephone, electronically, and in writing with agency staff, other State and Federal agencies or the public to explain legal process, collect needed information, process records, schedule meetings, and make travel arrangements.

SUPERVISION RECEIVED

Employees in this class receive general supervision from administrative superior or legal professionals. In some positions, the employee may report to both an administrative superior and a legal professional. Work is reviewed upon completion or as problems occur for accuracy, timeliness, quality, and conformance to legal standards. Employees are expected to independently complete work according to established legal procedures.

KNOWLEDGE AND SKILLS (KS)

Extensive knowledge of:

Complex secretarial and clerical procedures such as calendaring, maintaining appointment schedules, developing and monitoring files, and screening incoming calls and information.
Word processing software and computer equipment.
Legal terminology, systems and processes.

General knowledge of:

Legal record keeping and report preparation.
Court rules and regulations.

Skill to:

Do complex legal secretarial work involving initiative and sound judgement.
Operate desktop computer and software such as word processing and spread sheet applications.
Prepare legal documents.
Work with stringent deadline requirements.
Organize and prioritize work with competing importance.

Some positions may require:

Skill to key documents from dictation or transcription.
Basic knowledge of medical terminology or the workers' compensation system.

NOTE: The KNOWLEDGE and SKILLS are required for initial consideration. Some duties performed by positions in this class may require different KS's. No attempt is made to describe every KS required for **all** positions in this class. Additional KS requirements will be explained on the recruiting announcement.

Adopted 7/01

Revised

STATE OF OREGON
 Dept. of Administrative Services
 Human Resource Services Division