

## **LEGAL SECRETARY**

### **DISTINGUISHING FEATURES OF THE CLASS:**

This position supports attorneys by performing various secretarial duties of a technical, legal nature. Depending on assignment, the incumbent is expected to produce a variety of regular correspondence and legal documents, such as motions, briefs, petitions, affidavits, indictments, contracts and other documents. The work is often produced from transcript, dictaphone or rough draft, and the incumbent is expected to produce a legally acceptable document. The work regularly involves coordinating the scheduling of meetings, hearings and court dates for one or more professional staff members. The incumbent also provides other services, such as maintaining files and logs, transmitting legal orders and documents, and reviewing certain documents for legal requirements. The position differs from secretary-type positions in that the incumbent needs a detailed knowledge of legal terms and of the preparation and processing of legal documents that could be obtained only through prior experience in the field. The work is performed under the general direction of an attorney and within established guidelines and procedures of the specific law office. This position may direct the work of aides, interns, temporary employees and other lower level employees.

### **TYPICAL WORK ACTIVITIES:**

The following is indicative of the level and types of activities performed by incumbents in this title. It is not meant to be all inclusive and does not preclude a supervisor from assigning activities not listed which could reasonably be expected to be performed by an employee in the title.

1. Prepares legal documents such as motions, briefs, petitions, affidavits, orders, search warrants, subpoenas, indictments, contracts, opinions and other legal documents from rough draft, transcript or tapes;
2. Prepares, files and indexes a variety of legal documents; reviews submitted documents for accuracy, form, backup documentation; verifies cited sections of law;
3. Maintains and coordinates attorneys' schedules for meetings, hearings, court dates and similar matters;
4. Gathers and prepares statistical information on activities, outstanding judgments, potential liabilities and other information; completes reports for reimbursement of funded programs;
5. Maintains files and records, opens and closes case files and prepares files for legal proceedings; tracks files and cases using computer database system;
6. Performs secretarial support services such as acting as a receptionist, typing memos and correspondence, clipping or photocopying related articles, faxing information, billing for departmental services, etc.;
7. Reviews the case file and prepares a case history for the attorney's review;
8. Checks court calendar and pulls files, categorizes back up material for court cases and makes sure all papers are included and investigation research was completed;
9. After court hearing, reviews returned case files for further processing such as creating orders, communicating with courts to relay or obtain information;
10. Processes legal paperwork for an assigned specialty, such as torts, family court, appellate court, etc.;
11. Contacts a variety of court personnel, attorneys and staff and other professionals to gather information, schedule meetings and court dates;
12. Tracks, calculates and bills for staff time; tracks accounts for required balances;
13. Verifies submitted bills from outside counsel, witnesses, etc., and processes vouchers for payment.

**LEGAL SECRETARY** (Cont'd)

**FULL PERFORMANCE KNOWLEDGE, SKILLS AND ABILITIES:**

Knowledge of legal terminology, law office practices and legal forms necessary to recognize, construct and correct a wide variety of legal documents;  
Knowledge of composition, grammar, spelling, punctuation and required formats necessary to develop and correct correspondence, reports, records and legal documents;  
Knowledge of office practices necessary for interacting with staff and the public, expediting unit work and filing and retrieving information;  
Knowledge of software packages for word processing to produce a wide variety of legal documents and of spreadsheets to track budgets;  
Knowledge of automated case management system to track cases, produce forms and produce case management reports;  
Skill in operating office automation equipment to produce work accurately and efficiently;  
Ability to calculate costs and total activities;  
Ability to communicate both orally and in writing with a variety of people to provide and elicit information about administrative functions;  
Ability to organize, maintain and extrapolate information from records;  
Ability to understand and carry out moderately difficult oral and written directions;  
Ability to maintain confidentiality;  
Ability to expedite administrative details and coordinate a calendar independently;  
Ability to screen requests and provide information to clients, attorneys, the public and others;  
Personal characteristics necessary to perform the duties of the position;  
Physical condition commensurate with the demands of the position.

**MINIMUM QUALIFICATIONS:**

Graduation from high school or possession of a high school equivalency diploma and three years of full-time secretarial experience, one year of which shall have involved legal secretarial employment with an attorney.

NOTE: College or business school may be substituted for the required general experience on a year-for-year basis to a maximum of two years. In no case may college be substituted for the one year of legal secretarial employment with an attorney.

**SPECIAL REQUIREMENT:**

In some positions in this title, the appointing authority may require employee to acquire licensing as a Notary Public and/or NYSPIN certification.

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