

JOB DESCRIPTION

Name

Role Assistant

Reports to Fee Earner/Team Leader

Line Management N/A

Primary Purpose To provide administrative and secretarial support and assistance direct to Fee Earners dealing with all administrative aspects of the litigation process.

Key Responsibilities

Specific Litigation Duties

- Dealing with calls from clients, solicitors, agents and other parties where possible
- Dealing with new enquiries and taking client's initial instructions, arranging meetings with fee earner and dealing with the opening of files. Maintaining excel spreadsheets of new enquiries
- Assisting with drafting of documents, when required
- Dealing with the return of client's initial instruction form, monies on account and making further enquiries with clients where necessary
- Typing of attendance notes and some general typing
- Obtaining title documentation from Land Registry
- Carrying out searches at Land Registry and Companies House
- Compiling bundles for court and counsel and indexing
- Some basic research
- File closure and archiving
- Take minutes of team meetings
- To assist with the team's marketing and drafting articles
- Filing documents at Court and at Land Registry

Typing

Fast, accurate typing mainly opening files on the Case Management system with some copy typing producing correspondence, draft documents and engrossments. All typing to be spell checked and proof read prior to passing to Fee Earner. Typing to be produced in order given unless instructed otherwise.

Case Management

Fully utilise the Case Management system when typing correspondence, telephone notes etc.

Run workflows on specialist litigation case management

Telephones

Answer the telephone promptly in a professional manner, being polite and helpful at all times. Aim to assist calls of a general nature on your Fee Earner's files.

Ensure messages are recorded with client's name, telephone number, date and time and when possible, details of the query raised. Be realistic in call back options.

Liaise with fee earner as to system regarding direct dial numbers on correspondence and process for taking calls from Reception.

If appropriate type telephone message and place on file.

Ensure all new enquiries are logged on the Excel spreadsheet. Periodic review and follow up.

Client Contact

Attending clients on behalf of Fee Earner in reception and on the telephone for routine matters such as making appointments/collecting documents. If appropriate offer the client the use of the interview rooms.

File Administration

Where applicable and at the request of the Fee Earner write to clients to confirm appointments, book interview room and set up new file.

Undertake such work on the file as may be directed by the Fee Earner.

Filing should be undertaken at the request of your Fee Earner. During a Fee Earner's holiday arrange for all incoming/outgoing post to be matched with file and left on Fee Earner's desk for their return.

When requested by Fee Earner, open files on the Practice Database and when necessary retrieve archived paper/electronic files.

Carry out periodic review of Fee Earners' files to comply with firm's quality standards.

Archive both completed paper and electronic files on a regular basis.

Post

Collect post and sort for each fee earner. Aim for all post to be despatched on day of typing.

Compliance

1. To comply at all times with relevant Professional Obligations so far as they relate to your role as an Assistant including those laid down from time to time by:-
 - i) The Solicitors Regulation Authority
 - ii) The Financial Conduct Authority
2. To comply at all times with the Solicitors' Accounts Rules and if aware that your actions may have breached these Rules to notify the COFA to this effect without delay.
3. To be aware of your obligations under the Solicitors Regulation Authority Codes of Conduct to seek to comply with those obligations and if aware that your actions may have breached the Codes to notify the COLP to this effect without delay.
4. To comply with the Firm's Money Laundering Policy/Data Protection Policy so far as they relate to your role as an Assistant.

Other Duties

General office administration duties such as photocopying and collecting stationary, obtaining files, Deeds and assisting the Department with all administrative duties.

To undertake any other administration duties at the request of Fee Earners, Team Leader, Branch Manager or Business Head.

To ensure compliance with the Firm's Quality Standards.

Consults with/
is consulted by

Fee Earner

Team Leader and Business Head

Branch Manager

Accounts Department