

March 2021

- I. OVERVIEW OF POSITION.** The Document Management Specialist, is a key position responsible for assisting Legal Secretaries, Legal Assistants and Attorneys in digitizing and processing all documents that come into the Firm whether it be electronic or paper. Aside from processing incoming mail and supplemental materials the Document Management Specialist assists in other duties and projects that help create a more efficient flow of tasks throughout the Firm. It is important that the Document Management Specialist be highly analytical and organized, someone who can thrive in a deadline-oriented environment, as well as someone who works well in a collaborative and team-oriented workplace.
- II. REPORTING STRUCTURE.** The Document Management Specialist works closely with Attorneys, Legal Assistants and Legal Secretaries, however, the person in this position reports directly to the Office Manager of the Firm.
- III. HOURS AND STATUS.** The Document Management Specialist position is a full-time position generally working approximately forty (40) hours per week, however, some additional hours may be needed to meet Firm operational needs. Remote work is normally unavailable as business necessity requires in-person attendance for this position.
- IV. ESSENTIAL FUNCTIONS.** The Document Management Specialist is responsible for the following essential duties:
- Digitize all documents that come into the firm via email, FedEx, UPS, and hand delivery
 - Monitor regulatory activity to maintain compliance with records and document management laws
 - Operate existing document management system and ensure that it is effective and efficient
 - Apply strict confidentiality at all times when processing documents
 - Complete various projects and assignments to assist Legal Secretaries, Legal Assistants and Attorneys. This includes:
 - Copying, scanning, and digitizing documents from subpoenas, plaintiffs, courts, etc.
 - Completing mailing requests from legal support staff
 - Creating exhibits and all other support documents for trials
 - Sending digitized (Flash Drives & CDs) documents and media to appropriate parties
 - Investigating and closing active matters
 - Taking part in conformity projects which include:
 - Communication with outside firms
 - Auditing, editing, and printing claim documents
 - Documenting and updating spreadsheets
 - Attending signings at client sites to notarize documents alongside clients and attorneys
 - Scanning and sending signed documents to external Firms
 - Billing for all work retained within the conformity project
 - Develop, document, or maintain standards, best practices, or system usage procedures
 - Cover reception desk when necessary. This includes:
 - Answering phones and forwarding calls to the appropriate staff
 - Forwarding faxes and fax confirmations to legal support staff
 - Greeting clients, assisting them in completing waivers, and filing the waivers

While the Firm provides this job description in an effort to define the essential functions and responsibilities of the Document Management Specialist position, this description is a summary representative of the duties and responsibilities required of this position and may not include non-essential duties. Duties or responsibilities may be added or modified at the discretion of the Office Manager in accordance with the business needs of the Firm. An individual in this position may be asked to perform duties assigned to others if coverage is necessary.

V. CORE COMPETENCIES.

- Excellent computer and software skills.
- Strong organizational, communication, delegation and relationship-building skills.
- Excellent oral and written communications skills.
- Ability to prioritize while meeting all deadlines and demonstrating a high level of reliability and efficiency.
- Ability to work in a very fast-paced environment and adapt to changes.
- Highly detail oriented and ability to multi-task.
- Proficient in Microsoft Office Suite (Outlook, Word, Excel, PowerPoint)
- Must work well in a team-oriented environment.
- Notary preferred but not required. The Firm will assist in obtaining a notary upon hire.

VI. PHYSICAL AND MENTAL DEMANDS OF POSITION.

A. Physical Demands.

- Ability to verbally and effectively communicate to individuals and groups.
- Ability to regularly utilize a computer keyboard, monitor and other electronic equipment to prepare reports, communicate and perform other duties.
- Ability to endure a sedentary type of work requiring a great deal of sitting at a computer Ability to work at least forty (40) hours a week.
- Ability to read and interpret documents such as invoices, contracts, edits, etc.

B. Mental Demands.

- Ability to work effectively and efficiently and remain poised in high stress and conflict situations.
- Ability to simultaneously address multiple complex problems.
- Ability to multitask without loss of efficiency or accuracy.
- Ability to sustain attention with or without distractions.
- Ability to interact and communicate professionally and appropriately with a variety of individuals.
- Ability to meet time sensitive deadlines.
- Ability to maintain attendance sufficient to properly meet deadlines and perform work duties.

VII. QUALIFICATIONS FOR POSITION.

A. Qualifying Education.

- Preferred: Associates or four year college degree from an accredited college or university, preferably in but not limited to business, business administration, pre-law or other related fields.

B. Qualifying Experience.

- Preferred: Significant prior experience working in a law or other professional firm.
- Preferred: Significant prior experience working in document management or similar role.

While the Firm seeks these qualifications for this position, the Firm reserves the right to consider experience in lieu of education and to determine the best combination of education and experience appropriate for the position.