

Job description

Job Title: Personal Assistant

Department: Private Client

Reporting to: A supervising Partner

Key responsibilities

- The provision of support with the administrative and financial aspects of the department in line with the firm's policies, with particular responsibility for managing the administrative team in the department.
- The first point of contact for all administrative support within the department.
- Skills, experience or knowledge to undertake the work of the relevant department.

Client Care and compliance

- Opening and amending new client matters on the firm's client management database to ensure that all relevant information is entered in correctly and kept up to date.
- Client care including initiating standard client care letters through Tikit for the fee-earners' final edit; organising sending out of client care letters and advice letters, liaising with existing and established clients about ongoing or new matters.
- Co-ordinating the submission of files for LAA and LEXCEL and firm audits, including reviewing the financial documentation of file.
- Liaise with clients and external professionals or organisations as needed
 - Such as but not limited to counsel, interpreters, experts
 - Courts, HMPs, Home Office, Hospitals.

Team Co-ordination

- Co-ordinating the outsourcing of audio typing of correspondence and documents using Microsoft Word and Bighand (the firm's word-processing and digital dictation systems).
- Undertaking urgent audio typing of correspondence and documents using Microsoft Word and Bighand.
- Co-ordinating the admin needs of the team with other support team members, such as printing correspondence, collating and indexing enclosures and ensuring correspondence is delivered on time.
- Managing correspondence on cases in the absence of fee-earners, whether working remotely or on leave.
- Booking team members on training courses and organising their diaries accordingly, including the payment of any invoices.
- Maintaining and renewing of professional memberships, including the payment of any invoices.

File Management/Organisation

- Co-ordinating or preparing files for archiving and closure on Tikit; keeping departmental records.
- Assisting fee-earners in ensuring that file administration and maintenance is undertaken to the highest standard.
- Making appointments and arranging meetings/conferences for the fee-earners as and when required.
- Organising fee earners diary, paperwork and files.
- Co-ordinating the preparing and assembling material, documents and exhibits for meetings, Court appearances and hearings, including the preparation of bundles of papers and indices of these bundles.
- Completing case related external and internal forms and documentation such as file reviews.
- Assisting fee-earners to track key dates.

Financial Co-ordination - working with the Finance Team and fee earner

- Preparing for and attending billing meetings with fee-earners, identifying all billable matters, there is sufficient money on account and identifying future billing dates and action points.
- Assisting fee earners to cost and bill files promptly; including reviewing time recording ledger and drafting narrative for the invoice for fee earner to check and amend as necessary.
- Arranging for the processing and payment of the routine invoices and disbursements.
- Chasing payment of outstanding invoices and updating the OS app accordingly.
- Assisting with the changing and updating of time entries and rates on Tikit.
- Posting of transactions on Tikit.
- Reviewing reports provided by finance team and assisting fee earners in taking action.
- Monitoring email correspondence on cost and billing matters and prioritising for action and information purposes.

Financial Co-ordination for legally aided work/3rd party funding, working with the Billing Co-Ordinators

- Assisting fee earners with creating and updating budgets, Cost Cash plans for LA or 3rd party funding.
 - Setting budget/WIP/stage limits as needed.
- Arranging for the processing and payment of the routine invoices and disbursements.

The following section is not applicable to all PA roles within the firm;

- Applying for disbursement POA's on certificated matters and notifying finance and fee earner accordingly.
- Liaising with counsel clerks and allocating costs on CCMS - certificated cases. Dealing with and action notifications received on CCMS.
- Diarising when a certificate is available for an interim profit cost payment, when a payment is due, discussing with the fee earner and ensuring all disbursements and counsel fee notes are up to date. Applying for interim payment on CCMS and notifying accounts and fee earner accordingly.

- Drafting billing memo in certificated and legal help matters for fee earner to check and amend as appropriate; liaising with counsel's clerk to ensure we have up to date fee notes and preparing the file ready for sending to finance to bill.

Project participation and management

- Participate in working groups and project teams across the firm.
- Undertaking one-off projects for the firm, as required.
- Organising department events.

General Responsibilities

- Managing incoming written and electronic communication in an accurate and efficient manner and ensuring that appropriate and timely action is taken in response.
- Supporting the marketing activities of the firm including the provision of support for marketing events and the development of marketing communications with existing and potential clients.
- Provide support for fee earners throughout the firm as required.
- Undertaking any other duties as may be reasonably required to include supervising and/or delegating to other resource workers where appropriate.
- Working Knowledge of the systems of the firm not limited to:
 - Tikit/Partner4Windows
 - Bighand
 - Egress
 - Word/Excel/Outlook/Powerpoint
 - CCMS
 - Department specific systems
 - LA Portal

Person specification

It is essential that you are able to satisfy the below specifications. We have indicated when the below are not essential but desirable.

Skills

- Excellent audio/copy typing skills
- Excellent Communication - convey information clearly and accurately, both orally and in writing
- Excellent Organisational - strong administrative and document management skills, time management and workload planning
- Excellent Word processing skills
- IT (Microsoft 2016 Office suite) including database (*desirable*)

Knowledge

- At least 5 years legal experience
- Manual and electronic file management
- Legal aid procedures (*desirable*)
- Fielding new client enquiries
- Preparing, collating and ordering documentation
- Powerpoint presentations to intermediate level
- Excel to intermediate level
- High level of numeracy
- Willingness to assume additional responsibilities
- Knowledge of the core requirements of the Solicitors Code of Conduct
- Knowledge of Anti-Money Laundering rules and procedures

Ability

- Attention to detail
- Flexible - change direction and modify
- Quality focus

Qualities

- Enthusiastic
- Common sense
- Self-motivator
- Initiative and problem-solving skills
- Punctual and reliable