

## LEGAL PLAN REPRESENTATIVE I

Salary Range \$5,264 - \$6,521 Monthly

### DEFINITION:

Under general supervision, performs a wide variety of moderate to advanced administrative and clerical duties of a highly confidential nature in direct support of the ALADS legal plan; coordinates with ALADS legal partners through member referrals, provides clerical support to LDF administrator, works cooperatively with LDF Administrator and staff, and performs other duties as assigned.

### EXAMPLES OF DUTIES AND RESPONSIBILITIES:

- Answers phone calls and assists ALADS members in need of legal representation by following intake and referral procedures; handles urgent calls requiring immediate attorney dispatch and follows appropriate protocol.
- Review daily message reports from the answering service;
- Regularly follow up with members to ensure legal representation has met ALADS customer service objectives;
- Compile and create reports on customer service response data;
- Maintains confidential files and records;
- Types letters, memoranda, reports, and other correspondence material from marginal notes, rough drafts, dictation, and/or verbal instructions including correct grammar, spelling, and punctuation;
- Creates and presents PowerPoint presentations;
- Screens visitors and phone calls and makes appointments;
- Assist LDF Administrator with calendaring and setting up meetings;
- Assist law firms and Representative Services Division with further appeal procedures;
- Performs other duties as assigned.

## DESIRABLE EMPLOYMENT STANDARDS:

- Graduation from an accredited two-year college – OR – education and three years of progressively responsible experience in an administrative assistant position.
- Ability to interact with members, executives and other stakeholders with discretion, professionalism, and ability to maintain confidentiality of sensitive information.
- Consistent, punctual, and reliable attendance.
- Ability to organize and prioritize tasks in a fast-paced environment.
- Strong ability to work with coworkers and supervisors in a team environment.
- Client intake process experience gained working in a law, medical, or insurance office is highly desirable.
- Familiarity with a law enforcement union's legal plan operation is highly desirable.

## Knowledge Of:

Microsoft Word, Excel, Outlook, PowerPoint, SharePoint, Teams, scanning/storing documents, familiar with modern office practices and procedures, and current personnel practices, office machines, and filing systems.

## Ability To:

Perform a variety of highly responsible professional duties, type at a minimum net speed of 55 words per minute; use advanced English skills, including grammar, sentence structure, and original composition.

## NECESSARY SPECIAL REQUIREMENTS:

Incumbent must have a valid California Driver's License, proof of car insurance, and a dependable vehicle available to work each business day.

## PHYSICAL DEMANDS:

While performing the duties of this position, the incumbent is regularly required to: use hands to finger, handle or feel objects, tools, controls, and equipment; both see and hear; walk, sit and stand, and drive a motor vehicle; communicate verbally on the telephone and in-person; occasionally lift up to 20 lbs.; and occasionally kneel and bend.

## WORK ENVIRONMENT:

The incumbent will work principally in an office setting.