

## JOB DESCRIPTION

**Position Title: Legal Case Manager**

**Job Code:**

**FLSA Status: Exempt**

### POSITION PURPOSE

The Legal Case Manager supports attorneys and oversees the case management process at the Firm. This person will organize and maintain case files, help manage caseload requirements, and monitor budgets, timelines, and billing for case completion. The Legal Case Manager conducts extensive legal research, draft legal documents and case summaries, and reviews documents for compliance with strict legal requirements. This person makes recommendations to attorneys regarding cost and time-effective ways to accomplish the client’s goals and they keep the client and internal parties abreast of the current case status as requested.

### RESPONSIBILITIES AND TASKS

- Assists attorneys with all aspects of case management, including docketing deadlines, billing, and providing reminders as necessary.
- Coordinate between attorneys, staff, and outside vendors to manage the law firms case load, present case summaries/updates, and ensures that deadlines are met.
- Organizes and maintains all case files, and information concerning engagement, whether electronic or paper, in accordance with the Firms policies.
- Conducts legal research to obtain documentation regarding health insurance, social security, medical records, and medical providers.
- Drafts legal documents for attorney review.
- Reviews legal documents to ensure adherence to all legal requirements.
- Consults with attorneys and provides recommendations with regard to cost and time-effective ways to accomplish the client’s goals.
- Communicates case status with clients and outside counsel as requested.

### COMPETENCIES

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| <b>Accountability</b>                      | Taking ownership for responsibilities and commitments, and their outcomes.   |
| <b>Business Acumen</b>                     | Understanding the context, needs, and key factors associated with achieving business goals and objectives.   |
| <b>Change Agility</b>                      | Effectively anticipating, preparing for, facilitating, leading, and supporting sustainable positive change.  |
| <b>Collaboration</b>                       | Contributing and capitalizing on the talents of diverse stakeholders to achieve common goals while respecting individual needs.  |
| <b>Communication</b>                       | Conveying, understanding, acknowledging and incorporating information, news, ideas and feelings, using a variety of methods.   |
| <b>Leadership</b>                          | Engaging relevant parties, building a compelling vision of desired outcomes, generating energy and enthusiasm, and empowering others to take action by removing obstacles and building accountability. |
| <b>Personal Growth &amp; Development</b>   | Devoting time and energy to expand knowledge, skills, and abilities; and seeking new experiences or career opportunities.  |
| <b>Quality &amp; Customer Satisfaction</b> | Committing oneself to maintain a high standard of excellence while also meeting or exceeding customer expectations.  |
| <b>Talent Management</b>                   | Attracting, engaging, retaining, and developing high-performing individuals and teams to meet current and future business needs.   |
| <b>Job/Technical Proficiency</b>           | Demonstrating the appropriate breadth and depth of knowledge and skill specific to one’s profession, function or job discipline.   |

### POSITION REQUIREMENTS

**License or Certification:**

- Paralegal certification is desired.

**Minimum Qualifications:**

- High school diploma is required.
- Associate and/or bachelor’s degree is preferred.
- Minimum 3 - 5 years as a legal secretary or paralegal at a law firm is a plus.

- Experience drafting legal documents and conducting legal research is important.
- Proficiency in Word, Excel and Outlook and familiarity with other systems typically used in a legal environment, such as document and file management applications.

**Machines, Equipment Used:**

- General office equipment such as computer/laptop, telephone, copy/fax machine, calculator, scanner, etc.
- Microsoft Office software, to include Outlook, Word, and Excel.

**Physical Requirements:**

- Visual acuity, speech recognition, speech clarity.
- Ability to lift, lower, push, pull, and retrieve objects weighing a minimum of 15 pounds. Reasonable assistance may be requested when lifting, pushing, and/or pulling exceeds these minimum requirements.

**Skills and Abilities:**

- Oral communication, written communication, fluency in English, active listening.
- Information ordering, deductive reasoning, social perceptiveness, time management, critical thinking.
- Ability to coordinate, analyze, observe, make decisions, and meet deadlines in a detail-oriented manner.
- Ability to work independently without continuous supervision.

**Environmental Conditions:**

- Indoor, temperature controlled, smoke-free environment.
- Handicapped accessible.
- May work under stressful circumstances at times.

**Proficiency or Productivity Standards:**

- Has regular, reliable, and predictable attendance and punctuality.
- Adheres to dress code including wearing ID badge.
- Adheres to Standards of Business Conduct.
- May be required to work weekdays and/or weekends, evenings and/or night shifts if needed to meet deadlines.
- May be required to work on religious and/or legal holidays on scheduled days/shifts.
- May be required to perform other duties as assigned by supervisor.
- This position will support cultural diversity by promoting and maintaining an inclusive work environment and culture that is respectful and accepting of diversity.

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All job descriptions approvals and performance evaluations are conducted electronically. Under extenuating circumstances, paper templates can be requested from Human Resources or a member of leadership within the firm.