

## EDITED TASK LISTING

**CLASSIFICATION: Legal Secretary**

---

**NOTE: Each position within this classification may perform some or all of these tasks.**

<b>Task Statements</b>	
1.	Prepare legal pleadings in order to respond to litigation in multiple jurisdictions including State, Federal and Appellate Courts, Office of Administrative Hearings (OAH), and State Personnel Board (SPB) utilizing computers, various software, court rules and regulations, California Department of Corrections and Rehabilitation (CDCR) Secretarial Handbook, Gregg Reference Manual, California Style Manual, etc., as directed by attorneys and/or managerial staff.
2.	Proofread all work product for spelling, grammar, punctuation, proper legal citations and proper formatting utilizing computers, various software, CDCR Secretarial Handbook, Gregg Reference Manual, California Style Manual, etc., as directed by attorneys and/or managerial staff.
3.	File legal documents with multiple jurisdictions, State, Federal and Appellate Courts, OAH, and SPB to meet court rules and regulations requirements utilizing a computer, fax machine, mail, or personal service as directed by attorneys and/or managerial staff.
4.	Serve legal documents with various parties to meet court rules and regulations requirements utilizing a computer, fax machine, mail, or personal service as directed by attorneys and/or managerial staff.
5.	Review complex legal documents to ensure court rules and regulations requirements are met utilizing a computer, various computer software, tape recorder, CDCR Secretarial Handbook, Gregg Reference Manual, California Style Manual, etc., as directed by attorneys and/or managerial staff.
6.	Coordinate court related matters in compliance with court rules and regulations requirements utilizing fax, phone, computer software, etc., as directed by attorneys and/or managerial staff.
7.	Schedule court related matters in compliance with court rules and regulations requirements utilizing fax, phone, and computer software as directed by attorneys and/or managerial staff.
8.	Perform secretarial work to provide legal support services to attorneys utilizing various office equipment and computer software as directed by attorneys and/or managerial staff.
9.	Coordinate availability of all parties, facilities and equipment to schedule meetings for attorneys and/or managerial staff utilizing telephone, email, automated calendar system, written correspondence, teleconferencing equipment, etc., as directed by attorneys and/or managerial staff.
10.	Schedule meetings for attorneys and/or managerial staff to facilitate case and/or Departmental management utilizing telephone, email, automated calendar system, written correspondence, teleconferencing equipment, etc., as directed by attorneys and/or managerial staff.
11.	Prepare the meeting location and materials for attendees to ensure a prompt and organized meeting utilizing various office equipment as needed.
12.	Place calls to all parties to relay or obtain necessary legal information utilizing the telephone and teleconferencing as directed by attorneys and/or managerial staff.

*Tasks highlighted in bold text are not currently on the SPB classification specification*

## EDITED TASK LISTING

**CLASSIFICATION: Legal Secretary**

---

**NOTE: Each position within this classification may perform some or all of these tasks.**

<b>Task Statements</b>	
13.	Screen incoming calls to determine the necessary course of action to be taken utilizing the telephone as required.
14.	Direct incoming calls to the appropriate staff member to provide customer service utilizing the telephone as required.
15.	Maintain various calendars to assist staff by providing a schedule of activities utilizing an automated calendaring system as required.
16.	Date stamp incoming mail to verify the date received in office utilizing a date stamp as required.
17.	Open incoming mail to identify the contents utilizing a letter opener as required.
18.	Research incoming mail to identify the appropriate staff utilizing the computer as required.
19.	Scan incoming mail into the designated electronic file to preserve the document utilizing the computer and scanner as required.
20.	Log incoming mail to track distribution of documents utilizing Microsoft Excel and Microsoft Word as required.
21.	Distribute incoming mail to appropriate staff for review utilizing a manual process as required.
22.	Transcribe various materials for attorneys to produce a hard and/or electronic copy utilizing a computer and transcription equipment, as directed by attorneys and/or managerial staff.
23.	Compose written documents to opposing counsel, clients, courts and departmental agencies to transmit a request and/or response on a given issue utilizing a computer, various software, CDCR Secretarial Handbook, Gregg Reference Manual, California Style Manual, etc., as directed by attorneys and/or managerial staff.
24.	Organize documents for the attorneys to review and determine what is needed for litigation utilizing reproduction services, various office supplies and equipment as directed by attorney and/or managerial staff.
25.	Prepare travel arrangements for attorneys and managerial staff to produce an itinerary for a trip utilizing a computer, telephone, automated calendaring system, departmental travel portals as directed by attorneys and/or managerial staff.
26.	Travel to various locations to attend meetings, pick up/deliver documents and/or materials utilizing personal vehicle, public transportation and rental car as directed by attorneys and/or managerial staff.
27.	Calculate various mathematical computations to ensure accuracy of legal documents utilizing a computer and calculator as required.
28.	Create electronic and physical case files to document and track all events relative to a specific case utilizing a computer, legal software and office supplies in accordance with office procedure.

*Tasks highlighted in bold text are not currently on the SPB classification specification*

## EDITED TASK LISTING

CLASSIFICATION: Legal Secretary

---

**NOTE: Each position within this classification may perform some or all of these tasks.**

<b>Task Statements</b>	
29.	Finalize electronic and physical case files to preserve documents related to a specific case utilizing a computer and legal software in accordance with office procedures.
30.	Maintain physical files in the file room in accordance with State Administrative Manual (SAM) and Departmental Operations Manual (DOM) to preserve case documentation utilizing physical labor as directed.
31.	Archive physical files to preserve case documentation in accordance with SAM and DOM utilizing physical labor as directed.