Positions Descriptions – Parnall Law Firm

Contents

Position Descriptions

OPERATIONS / OFFICE MANAGER

MISSION STATEMENT

To help build the law firm to most effectively utilize its team in intelligently and compassionately advocating for the maximum reimbursement of the value of our client's harm, and the wrong that caused it.

To create a team in which each knows its role, function and mission – and a sense of teamwork that feels fulfilled and motivated to contribute and grow the firm.

To make sure that, at the end of the case, our clients are satisfied and know Parnall Law has stood up for, fought for, and given voice and value to his or her harm.

To bring in revenue that contributes to profit.

RESULTS / OUTCOMES (What you must get done.)

To "partner" with the owner and partners to improve the firm's operation and success, achieving across the board efficiencies in the delivery of world class legal and client service. Effectuate the vision of the firm. Responsible for a complete review of the firm's operating procedures in every department to achieve efficiencies through innovation, technology or otherwise. Create, implement and maintain standard operating procedures to meet business objectives and legal/financial and HR compliance. Responsible for all HR functions and facilities management. Oversee all aspects of the firm's operation including but not limited to file reviews and review of work flow to monitor individual and team performance to ensure delivery of world-class service, extraordinary legal results and sustainable profits. Administrative supervision of attorneys, supervisors, IT providers, and other managers. Provides guidance and leadership to the staff and managers. Understands and supports the mission of the firm. Improves the firm's profitability.

REPORTS TO / FROM: Reports to: Managing Partner. Reports from**:** Lead Paralegal (administratively), Attorneys (administratively), all staff.

OTHER INFORMATION RELATIVE TO JOB: Regular travel to all locations and occasional travel out of state/country to participate in off-site meetings/ conferences. Responsible for facility management in all locations.

DUTIES / RESPONSIBILITIES

To improve the firm's profitability while ensuring world-class service and extraordinary legal results. Review all current operating procedures to achieve efficiencies, and delegate tasks as needed to ensure that processes result in efficiencies that support and promote our mission. Ensure all production goals are met by overseeing the consistent delivery of all value-maximizing operational initiatives and five-star service on every file. Production goals include but are not limited to increasing the average fee, reducing cycle time, and increasing PI demand production. Ability to comprehend and analyze profit and loss statements and balance sheets. Work with Owner to identify opportunities to increase revenues (other practice areas?). Work with Assistant Manager / Bookkeeper or Accountant to identify opportunities to reduce expenses. Responsible for all leases, vendor contracts and facilities management, with possibility of delegating to Assistant Manager / Bookkeeper.

Establish productivity standards. Identify and meet training needs. Identify performance management issues and effectuate appropriate follow through. Review all files for system compliance. Design performance and operational improvement plans as needed.

Provide guidance and direction to all direct reports as the go to person regarding questions involving all items that are related to operations and personnel/human relations.

Show leadership and promote a positive team environment throughout the firm, with emphasis on achieving excellent legal results, client service and relationship building, including referral source loyalty. Ensure fair and consistent employment practices, enabling the firm to be an employer of choice in the industry. Conduct annual evaluations / "stay interviews" on all direct reports. Conduct initial interviews, telephone interviews and reference and criminal background checks for all positions. Conduct (with owner input) interviews for all positions. Establish and update job descriptions and employee and policy and procedure manuals as needed.

Responsible for all HR. Implementation and administration of firm's benefit packages. Work with other team members in branding initiatives and team building activities.

MINIMUM EXPERIENCE, EDUCATION AND SKILSS REQUIRED: MBA or Advanced Degree Preferable. Minimum 5 years management experience, preferably in a law firm setting. Smart, with strong written and verbal communication skills. Positive interpersonal and leadership skills to deal with individuals at all levels in a professional and respectful manner. Ability to reviews systems, identify efficiencies, create new systems, analyze facts and data to form objective conclusions, make sound recommendations and exercise good judgment. Organized. Computer skills a must. Ability to multitask and meet deadlines in a fast paced environment. Detail oriented yet able to see the big picture.

FILL IN: SEE BELOW

Position Descriptions

FIRM ADMINISTRATOR

MISSION STATEMENT

To assist the firm in organizing human resources, managing the office building and grounds, communicating and negotiating with office vendors, book-keeping, and assisting the lead paralegal and the firm's owner in marketing and other various tasks.

To assist the firm in organizing, maintaining, and accounting of all bookkeeping duties necessary to ensure accurate accounting and transparency of financial positions and key metrics

RESULTS / OUTCOMES (What you must get done.)

- Maintain functionality of office building, grounds, communications and equipment
- Meet human resources deadlines and maintain employee files
- Print reports weekly
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Benefits Director (aka Human Resources)

- Benefits
    - Liaison with health insurer, dental insurer, 401k TPA
- Attorney support
    - Travel reimbursements
    - CLE registration, reimbursement, confirmation
- Insurance: liaison with insurance companies and agents: malpractice, CGL, cyber, etc.
- Payroll
    - Scan and email timesheets
    - Post payroll payments to Quickbooks
    - Mail 401k check to fidelity
    - Review payroll reports
    - Confirm PTO

Manage Building and Vendors

- Maintain list of office building contact information
- Contact IT, repair and maintenance providers
- Ordering supplies
- Communications with office vendors to ensure equipment and services are completed timely

Bookkeeping

- Assist and be aware of Bookeeper's tasks

Other Duties as assigned

Fill In: Reception; Assistant to Medical Records or File Manager; Runner

Position Descriptions

BOOKKEEPER

MISSION STATEMENT

To assist the firm in organizing human resources, managing the office building and grounds, communicating and negotiating with office vendors, book-keeping, and assisting the lead paralegal and the firm's owner in marketing and other various tasks.

To assist the firm in organizing, maintaining, and accounting of all bookkeeping duties necessary to ensure accurate accounting and transparency of financial positions and key metrics

RESULTS / OUTCOMES (What you must get done.)

- Maintain functionality of office building, grounds, communications and equipment
- Meet human resources deadlines and maintain employee files
- Print reports weekly
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Benefits Director (aka Human Resources)
- Payroll
    - Scan and email timesheets
    - Post payroll payments to Quickbooks
    - Mail 401k check to fidelity
    - Review payroll reports
    - Confirm PTO
- Party planning (anniversaries, birthdays, etc.)
- Employee files
    - Set up new employees – I9, payroll direct deposit, handbook signed, etc.
    - Keep employee files
- Assist in hiring process
    - Post ads
    - Collect and review resumes
    - Coordinate interviews
    - Keep and file resumes
- Benefits
    - Liaison with health insurer, dental insurer, 401k TPA
- Attorney support
    - Travel reimbursements
    - CLE registration, reimbursement, confirmation
- Insurance: liaison with insurance companies and agents: malpractice, CGL, cyber, etc.

Manage Building
- Maintain list of office building contact information
- Contact IT, repair and maintenance providers
- Ordering supplies

- Communications with office vendors to ensure equipment and services are completed timely

Bookkeeping

- Deposit settlement checks (attorney fee, tax and costs advanced)
- Accounts Payable – Law firm operating expenses (utilities, insurance, rent, etc.)
    - Ensure Bert reviews and approves all bills, invoices, and estimates
    - Pay all bills that come in and maintain an organized record.
    - File invoices/bank statements electronically into file center plf-administration
- Receipts
    - Enter code and memo for receipts
    - Scan or post credit card and Petty Cash receipts
- Advanced costs – Client case expenses (CEX checks)
    - Receive and print case expense checks for paralegals
    - Check with Bert for any check over $100
- Post transactions to QuickBooks – credit card statements, receipts, etc.
- Reconcile bank statements
- Sales Taxes – verify and pay gross receipts taxes monthly
- Code credit card transactions to proper accounting code and enter receipts into CEX under $5000 account.
- Meal receipts
    - Enter code and memo for meal receipts
    - Scan or post credit card and Petty Cash receipts
- Holding account: update twice per week (Accounts Payable, Credit card (Spark), Sales Tax Payable, etc.
- Credit card (Spark):
    - Download credit card transactions twice a week
    - Enter code into credit card transactions from credit card statement
    - Print QB credit card statement and highlight uncertain or unknown codes to give to Bert to review and revise
- Send reports to Lead Paralegal

Client trust accounts

- Disbursements:
    - Confirm are correct (calculations concerning fee, tax, costs, providers' balances and client check).
    - Export checks to be paid from needles
    - Deposit attorney income, tax and costs check
- Medical Payments coverage and other miscellaneous costs reimbursement

Settlement spreadsheet

- Verify settlement spreadsheet is updated and accurate

Payroll

- Receive payroll information and verify for accuracy
- Verify bonus spreadsheet is accurate
- Email bonus spreadsheet to Bert for review, and he sends to Payroll company

- Receive PTO reports and verify for accuracy

Print monthly reports

- QB P&L Report: Reports - Company & Financial - Profit & Loss Previous Year Comparison; Print landscape, "print 1 page wide." Highlight Income, Marketing, Computer, Payroll, Office Expenses and Supplies, and anything else large or curious.
- QB Budget Reports: Reports - Memorized Reports - BUDGET V. ACTUAL, CURRENT AND YTD, WITH VARIANCE. Highlight large $ over budget (in positive)
- QB P&L graph: Company and Financial - Income and Expense Graph

Other Duties as assigned

Fill In: Administrative Assistant; Reception; Runner

Position Descriptions

ADMINISTRATIVE ASSISTANT

MISSION STATEMENT

To work together with the Administrator as a team to keep the office running smoothly.

RESULTS / OUTCOMES (What you must get done.)

- Assist the Administrator in her outcomes by performing various administrative tasks related to running of the office.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Assist the Administrator

- Benefits, Insurance, Payroll, Building management
- Filing and organization

Employee engagement

- Party planning (anniversaries, birthdays, etc.)
- Employee files
    - Set up new employees – I9, payroll direct deposit, handbook signed, etc.
    - Keep employee files
- Assist in hiring process
    - Post ads
    - Collect and review resumes
    - Coordinate interviews
    - Keep and file resumes

Fill In: Reception; Runner

Position Descriptions

EXECUTIVE ASSISTANT

MISSION STATEMENT

- Improve the executive's productivity allowing him to perform more, higher value work.
- Help maintain the positive and professional reputation of the firm.
- Help the executive implement and develop the Parnall Law marketing plan.

RESULTS / OUTCOMES (What you must get done.)

- To assist the executive in his various tasks.
- Daily, weekly and monthly reports to the executive
- Organize, prioritize and implement marketing tasks and strategy.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Executive / Personal Assistance

- Conserves executive's time by reading and routing correspondence, drafting letters and documents, answering and directing inquiries as appropriate and initiating telecommunication
- Produces and organizes information by transcribing, formatting, inputting, editing, retrieving, copying and transmitting text and imagery
- Collects and analyzes information and provides brief summaries of relevant material to the executive
- Runs reports and when necessary analyzes data to assist with strategy and business development
- Manages and updates executive's calendar and travel arrangements (scheduling and planning meetings, conferences, events)
- Maintains filing system for incoming documents and be able to retrieve information quickly
- Assists management level staff as needed in order to meet firm revenue and client satisfaction goals and hire and train new employees
- Assists with development and implementation of marketing plan
- Intermittent personal assistance as needed

Timelines for Completion of Tasks (Executive will direct on the urgency of incoming tasks as needed):

- Urgent tasks will be completed the same day as requested
- Projects/tasks communicated to be semi-urgent will be completed within one business day
- Non-urgent tasks will be completed within one week
- Routine tasks will be completed according to a schedule developed by the executive (i.e. daily, weekly, monthly reports, meetings, etc.)

Position Descriptions

Hiring:
- Place job advertisements; Review resumes and applications
- Work with Administrator and Lead paralegal to coordinate interviews

Various other tasks:
- Party planning (anniversaries, birthdays, etc.)
- Filing of various administrative documents

Marketing (may be covered by separate Marketing Assistant):
- Organize, set up and attend sponsored events
- Communicate with vendors concerning marketing materials
- Review and evaluate marketing progress in SEO and social media
- Assist in publishing material, and advertising, on social media
- Review and organize marketing materials
- Record data and publish reports of marketing progress
- Market to former clients, doctors, lawyers
- Publishing newsletter
- Research and implement new ideas for marketing
- Communicate with advertising consultant and SEO company
- Help implement new marketing programs

Position Descriptions

MARKETING ASSISTANT

MISSION STATEMENT

To help create, modify and implement the PLF marketing plan.

To help build and grow the number, sizes and quality of cases handled by the firm.

To help maintain the positive and professional reputation of the firm.

RESULTS / OUTCOMES (What you must get done.)

- Increase revenue to the firm by 10% annually
- Monthly or semi-annually newsletters, doctor office visits, client advisory panels
- Monthly or bi-weekly reports to Bert
- Organize, prioritize and implement marketing tasks and strategy.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Marketing

- Organize, set up and attend sponsored events
- Communicate with vendors concerning marketing materials
- Review and evaluate marketing progress in SEO and social media
- Assist in publishing material, and advertising, on social media
- Review and organize marketing materials
- Record data and publish reports of marketing progress
- Market to former clients, doctors, lawyers
- Publishing newsletter
- Research and implement new ideas for marketing
- Communicate with advertising consultant and SEO company
- Help implement new marketing programs

Initial work:

- Read and watch PILMMA Marketing Plan for Lawyers
- Review, revise and add to Parnall Law Marketing Plan
- Research hurtcallbert.com – attorneys, areas of practice, testimonials, and all material
- Review Advertising and Marketing folder, in particular:
    - Watch all TV ad videos; listen to all radio ads
    - Review 5 most recent billboard designs, and “Map of Billboards”
    - Make sure to get business card for Khanh
    - Review Marketing reports, Leads and Open cases monthly graph, Monthly reports and metrics
    - Website – Consultwebs (especially digitial advertising campaign expansion agreement, and reports folder) and Boomtime.

Position Descriptions

- Review testimonial script of questions – ask Maymie where ours is; also read the one in Video – Crisp – Parnall Law Storyboard or production booklet. Add the Crisp questions to ours.
- Set up video recording so Bert can record videos
- Read PILMMA magazines
- Research newsletter options and ideas. Get quote from Lynn at Premier Print Marketing (ask Glenda for contact info). Get quote from newsletterpro.com (reference my friend David Crum, New Mexico Legal Group).
- Research Needles. Get training. Look at contact mailing options like Holiday cards. Become familiar with marketing reports.
- Focus on newsletter, testimonials, referrals, and reports.

Position Descriptions

PARALEGAL

MISSION STATEMENT

To work together with the attorneys as a team to provide clients with intelligent, compassionate and determined advocacy, with the goal of maximizing compensation for the harms caused by wrongful actions of others.

To give clients and files the attention and organization needed to help bring resolution as effectively and quickly as possible.

To make sure that, at the end of the case, the client is satisfied and knows Parnall Law has stood up for, fought for, and given voice and value to his or her harm.

To bring in revenue that contributes to profit.

RESULTS / OUTCOMES (What you must get done.)

- Be familiar with each case in your caseload.
- Be up-to-date with each case. Follow software checklist requirements, i.e.,
    - Letters of representation and welcome sent within two days after intake.
    - Letters and phone calls updating progress, and negotiation, at each stage.
    - Complete all attorney assignments in a timely manner.
    - Demand letters out within 3 weeks of completion of treatment.
    - Disbursements within 2 weeks of receiving checks.
- Posting all case information, and litigation information, in Needles.
- Proportionately contribute to overall client satisfaction and firm revenue goals.
- Achieve 95% positive reviews.

DUTIES / RESPONSIBILITIES

Make Claim

- If not open, call to report new claim
- If open, call to find out claim number and adjuster
- If necessary, help with property damage claims
- Speak to adjusters
- Send Ltr Rep to auto / health ins., welcome letters to clients
- Open subrogation claim with health insurance or medicare
- Enter analysis of case and send analysis to attorney
- Follow up on client homework such as dec pages
- Send copies of documents for clients or update them on their case
- Speak to clients and gets updates on their care
- Review demand packages
- Post costs
- Create motion/mediation/exhibit binders
- Call on balances for paybacks
- Request reductions on subro claims, provider balances

Reception/Customer Service

Position Descriptions

- Answer phones
- Potential client intakes, gather information to include in attorney calendar notice to give attorney a good, detailed idea about what the claim is and what follow-up questions need to be asked
- Meet with clients
  - During intakes
  - When they stop by
  - For disbursements

Correspondence

- Compose letters and requests
- Fax letters or requests
- Scan incoming letters into file, distribute to attorney

Filing

- Scan and file incoming documents into case files (FC and physical)
  - Pleadings
  - Discovery
  - Correspondence
  - Medical records
  - Evidence

Court Filing

- Make copies of pleadings
- E-file and e-serve court pleadings
- E-file pleadings in plf client file
- Create and update pleading index

Litigation

- Draft pleadings and discovery for lawsuits
- Send summons, complaint & discovery to defendants
- Serve service of process packets via mail, if possible
- Draft other pleadings
- Draft and serve subpoenas
- Compose discovery responses
- Compose discovery requests
- Pull exhibits
- Create motion/mediation/exhibit binders
- Be familiar with whole file
- Post Needles note to attorney when tasks are completed (i.e., noticing a deposition, calendaring scheduling order deadlines, etc.)

Communicate With Client

- Speak to clients, give case updates
- Send copies of documents for clients or update them on their case

Investigation

- Westlaw
- Online searches, etc.

Calendar
- Calendar all case items and reminders, if necessary
- Post hearings
- Post litigation deadlines
- Make appointments
- Arrange depositions, mediations, etc.
- Remind attorneys of calendared items coming up several days in advance

Data Entry
- Post case and provider information into Needles
- Update Needles file (i.e., new judge, change in contact info, etc.) as needed

Copying
- Correspondence
- Pleadings
- Discovery
- Exhibits
- Etc.

Fill In: File Manager; Medical Records Manager; Reception

Position Descriptions

LEGAL ASSISTANT

MISSION STATEMENT

To work together with the paralegals as a team to provide the attorneys and clients with intelligent, compassionate and determined advocacy, with the goal of maximizing compensation for the harms caused by wrongful actions of others.

To give clients and files the attention and organization needed to help bring resolution as effectively and quickly as possible.

To make sure that, at the end of the case, the client is satisfied and knows Parnall Law has stood up for, fought for, and given voice and value to his or her harm.

To bring in revenue that contributes to profit.

RESULTS / OUTCOMES (What you must get done.)

- Complete all paralegal requests accurately and promptly.
- Posting all case information, and litigation information, accurately in Needles.
- Proportionately contribute to overall client satisfaction and firm revenue goals.
- Achieve 95% positive reviews.

DUTIES / RESPONSIBILITIES

General

- Send out routine letters of representation to insurance carriers within one business day of the file being opened
- Send out client welcome letters within five business days of the file being opened.
- Client follow up calls, as directed by paralegal.
- Compiling attachments for demand letters on disc and mailing to insurance carriers and noting dates in case tab and insurance tabs.
- Making follow up calls to insurance carriers to confirm receipt of demand letters.
- Compiling exhibits/attachments to mediation statements, printing with an index and organizing in notebooks for the mediator and for the assigned attorney.
- Compiling exhibits and printing with the index for arbitration notebook for defense counsel and one for the assigned attorney.
- Creating hearing notebooks for the attorneys which contain:
    - Motion
    - Response
    - Reply
    - Notice of Hearing
    - Any relevant case law/research/evidence
    - Research as directed by paralegal, which may include
- TLOs, nmcourts.gov, Facebook, other online research tools for background info
- Property address search
- License info and research
- Google maps of relevant sites

- Interaction with various public agencies for IPRA requests, reports or other data needed.

Court Filing

- E-file and e-serve court pleadings or discovery

Fill In: File Manager; Receptionist

Position Descriptions

INTAKE SPECIALIST

MISSION STATEMENT

To warmly and compassionately greet callers (and sometimes visitors), making them feel welcome and comfortable.

To make the best first impression on clients and all prospective clients, whether we take the case or not.

To recognize a client we want to help, and determine whether an avenue of recovery may exist.

To get potential clients that we can help in the door as promptly as possible.

To help injured callers get the help they need.

To create raving fan clients, and help the business and law practice grow and thrive.

RESULTS / OUTCOMES (What you must get done.)

- Conduct a brief but sufficient and thorough conversation by using the correct and most effective questions in order to determine liability, damages, and source of recovery.
- Immediately schedule potential clients for a meeting with the attorney, to take place as soon as the client can come in, or if necessary, as soon as the attorney can go to the client.
- Within 5 minutes of phone intake, schedule follow up calls to potential clients who have not yet agreed to meet with an attorney.
- Within 30 minutes of attorney evaluation, schedule follow up calls to potential clients who have not signed a retainer.
- Achieve 95% success rate in signing new callers who we can and want to help.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Telephone Intakes

- Establish rapport with potential clients immediately over the phone.
- Answer calls and emails from potential clients about their claims, schedule for attorney intake
- Post all new cases on intake sheets, and messages, in needles promptly and accurately.
- Research the potential client and case to help inform paralegals and lawyers about the viability of the case.
- Sets the tone and pace of the client case evaluation.
- Become familiar with our referral list to help direct and refer callers we cannot help.
- Keep track of cases that we have referred to attorneys with whom we associate.
- Weed out unwanted callers.
- Help the paralegals with data entry and other office tasks when not receiving calls or visitors.
- Help create a positive team environment by communicating with each team member to ensure all potential new clients are given prompt attention.

- Deadline new intake sheets for follow-up / sols / declination
- Draft declination letters with appropriate SOL language.

Administrative support

- Manage and update provider contact information in Needles.
- Data entry for new cases, and other various tasks.

REQUIREMENTS

- Positive, confident, charismatic, influential, intelligent, and compassionate person.
- Conveys confidence on the phone and in-person
- Strong active listening skills.
- Intelligent analytical ability to determine liability, damages, and source of recovery.
- Comfortable and confident in selling legal services.
- Empathy for injured clients, with ability to put them at ease during their difficult time.
- Exceptional communication skills, verbal and written.
- Influential in helping client to realize that Parnall Law Firm is the best choice in personal injury representation.
- Organized, focused, and attentive to all intakes and follow-ups.
- Resourceful in helping investigate and uncover root of legal issues.
- Enthusiastic ability to absorb guidance and training in intakes, insurance law, and personal injury cases generally.
- Professional attire and demeanor.
- Treats a call at 4:30 on Friday with the same care and compassion as one on Monday morning.
- Able to follow loose script and avoid giving legal advice.
- Computer and typing skills. Enthusiastically absorbs training in case management software.
- Inbound sales experience a plus.
- Personal injury law (particularly plaintiff) experience a plus.
- Team player. We are strong believers in teamwork. If you are not a team player, this job is not for you.

Position Descriptions

DOCUMENT MANAGER

MISSION STATEMENT

To make sure that all physical and digital documents are in their proper place in the case file, and are easily accessible at all times.

RESULTS / OUTCOMES (What you must get done.)

- Follow, and establish, procedures to put every document in its proper place.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Open New Cases:
- Open case in Needles, input all information
- Scan Signed Retainer
- Scan in all initial documents
- Call to verify adjuster later
- Locate police, fire, animal welfare reports
- Request 911/CADs
- Set up all insurance claims: Liability, UIM, Med Pay, Health Insurance
- Begin other tasks listed on "to-do office" sheet

Claims
- If not open, call to report new claim
- If open, call to find out claim number and adjuster
- Call later to verify adjuster in preparation for sending demand

Investigation
- Look up police report number
- Obtain police, fire, animal welfare reports
- Obtain Photos, Lapel, and Other evidence as needed
- Request 911/CADs
- Send IPRA requests to Police Department for video evidence
- Run TLO reports for attorneys and paralegals as requested

Filing
- Create motion/mediation/exhibit binders
- Double check that medical records/ evidence/ discovery are scanned in before filing
- Saving all faxes to File Center and forward to the assigned paralegal

Data Entry
- Post case and provider information into Needles

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Position Descriptions

Manage Supplies

- Take requests for supplies from office
- Order supplies- midway office supply/environmental control (toilet paper and paper towels for dispenser in restrooms)
- Organize supply room

Fill In: Paralegal; Runner; Reception

Position Descriptions

MEDICAL RECORDS MANAGER

MISSION STATEMENT

To gather complete medical records and bills related to each client's case.

To accurately and persuasively tell the client's story in a draft demand letter, including a summary of the case for liability, and the client's damages.

To summarize other prior and subsequent medical records that may influence the client's case.

RESULTS / OUTCOMES (What you must get done.)

- Gather medical records and bills within 1 month of maximum medical improvement.
- Complete draft demand letter within 1 week of receiving complete medical records and bills.
- Communicate helpful and persuasive information in the draft demand letter.
- Communicate harmful information to the attorney and paralegal on the case.
- Achieve 95% success rate in signing new clients who we can and want to help.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Medical Records and Bill Requests

- Write medical providers to request records and bills
- Work with assistant to coordinate follow-up requests
- Communicate to attorney and paralegal through Needles about what records/bills have been requested and what records/bills have been received –Med Mal
- Organize medical records when received
- Estimate billing from the VA
- Review records and bills for relatedness, discrepancies, high billing, etc.
- Order films of broken bones, head trauma, herniated discs

Demands

- Send hedonic damages letters
- Organize records, bills and evidence into demand packets
- Draft demand letters and evaluation letters
- Highlight treatment records discussed in letter

Medical Releases

- Keep up-to-date authorizations that are not more than one year old

Medical Malpractice treatment reviews and summaries

- Review initial records for potential med mal cases

Case Work

- Assist paralegals and attorneys as needed

Position Descriptions

OFFICE ASSISTANT – MEDICAL RECORDS

MISSION STATEMENT

To ensure the success of the Medical Records Director.
To help gather complete medical records and bills related to each client's case.
To update client medical bill balances and provide paralegals and attorneys accurate billing information on each case.
To update attorneys and paralegals with respect to client treatment.

RESULTS / OUTCOMES (What you must get done.)

- Assist the Medical Records Director in her outcomes by gathering requisite medical records and bills.
- Establish communications with each client during the treatment phase of their claim.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Assist the Medical Records Director

- Submit and follow up on HIPAA-compliant medical records and bill requests to the client's treatment providers, including:
  - Paper requests via electronic fax.
  - Electronic requests via Chartswap.com, e-mail, and online patient portals.
- Track and update the status of client medical releases as required.
- Assist in the various facets of case work relevant to medical records and billing as directed by the Medical Records Director.
  - Clarify treatment providers/days/locations.
  - Fill in any gaps in requested records and bills.

Client Treatment Updates

- Contact clients every 3 weeks to track treatment locations, providers, and progress, noting all information in client's file for the paralegal, attorney, and Medical Records Director.
- Make sure client questions or concerns are addressed if they have any.

Medical Bill Balance Updates

- Verify any and all outstanding balances for client treatment with their providers.
- If applicable, ensure clients are using their health insurance and that providers are submitting the bills to the insurance company.
  - Direct providers to submit billing to appropriate party, whether health insurance or medical payments coverage.
- Track balance information in client's Needles file, and update/alert the paralegals on important treatment/balance information.

Fill In: Office Assistant; Reception; Runner

Position Descriptions

RECEPTIONIST

MISSION STATEMENT

To warmly and compassionately greet callers and visitors, making them feel welcome and comfortable.

To make the best first, continued, and lasting impression on clients and all visitors and callers, including lawyers, doctors and other providers, witnesses, court reporters, insurance adjusters, etc.

To create raving fan clients, and help the business and law practice grow and thrive.

RESULTS / OUTCOMES (What you must get done.)

- Direct calls to the right person with as much efficiency and diplomacy as possible.
- Weed out unwanted callers.
- Help create a positive team environment by communicating with each team member to ensure all callers and visitors are given prompt attention.
- Provide prompt and courteous service for every caller and visitor.
- Become familiar with clients and callers to help document the case and handle client issues that arise, whether the paralegal can help or not at that moment.
- Posting all messages in Needles promptly and accurately.
- Helping the paralegals with data entry and other office tasks when not receiving calls or visitors.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Reception/Customer Service

- Answer phones (direct caller to person who can help them – or if unavailable, help them)
- Transfer phones to / from Answering Service at 8 AM / 5 PM
- Greet people at door and offer them beverages/try to make them comfortable
- Intakes
  - Print intake sheets / Googlemap from intake screen
  - Let attorney and paralegal know that client/intake/etc. is here
  - Let attorney know when finished with intake forms and have intake forms ready to hand to attorney
  - Shut door for meetings if needed
  - Know what / where intake forms are
  - Call to confirm appointments with prospective clients, note on calendar
  - Photograph new clients after intakes, vehicle damage, download to FC
  - Have provider list and other contacts available for attorney

Housekeeping

- Make sure water and coffee is available
- Clean/organize front area, copy room and conference room

Position Descriptions

Correspondence

- Get mail from front door
- Open all mail, date stamp, sort
- Address thank you cards/holiday cards (aside from the new cases)

Calendar

- Make general appointments at attorneys' request (i.e. meetings, CLEs, Rotary, events, etc)

Data Entry

- Post case and provider information into Needles

Discovery

- Typing answers

Miscellaneous

-

Position Descriptions

COURIER

MISSION STATEMENT

To promptly, efficiently and safely deliver and transport documents and other material from other offices and agencies to and from the firm.

To make the best first, continued, and lasting impression on other providers, agencies and businesses with whom our office has contact.

RESULTS / OUTCOMES (What you must get done.)

- Create an efficient daily plan that minimizes the time involved on each run.
- To expediently deliver and pick up documents and material as soon as reasonably possible.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Daily Priority

- Pick up mail from post office at the appropriate time
- **Call on police reports daily – follow checklist.**
- Police station – police reports, 911 / cads

Running/Salesmanship

- Def. atty or insurance co. to pick up checks/exchange for releases
- Hand deliver mediation statements, discovery responses, etc.
- Deliver or pickup at ups or fedex
- Pick-up cakes, lunches, cards, etc.
- Pick up supplies
- Pick up breakfasts for Tuesday and Friday huddles
- Buy food and maintain PLF Health Bar

Marketing

- Brochures to doctors and providers
- Settlement checks with donuts to doctors and providers
- BBQ and brochures to tow yards
- Client Advisory Panels (dinners for clients who refer)
- Setting up booths at conferences
- Etc. as needed

Executive Assistance

- Personal errands such as: Alterations, Car wash

Position Descriptions

Organization

- Move closed files / boxes to shed
- Retrieve closed files / boxes from shed

Assistance

- Copies
- Post office runs
- Etc.

Housekeeping

- Clean and stock kitchen and refrigerator
- Stock bathroom
- Trash
- Shred/recycle
- Water plants

Fill In: Office Assistant; Reception

Position Descriptions

LAW CLERK

MISSION STATEMENT

To effectively and promptly research and write on subjects relevant to a client's and attorney's need in any particular case.

RESULTS / OUTCOMES (What you must get done.)

- Promptly research any given issue.
- Promptly write a clear and memo on the issue, citing sources.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Research and Writing

- Assist attorneys in research and writing

General Office Assistance

- Assist staff as needed

Fill In: Office Assistant; Reception

Position Descriptions

ATTORNEY

MISSION STATEMENT

To use intelligent, compassionate and determined advocacy to effectively maximize reimbursement of the value of our client's harm, and the wrong that caused it.

To make sure that, at the end of the case, the client is satisfied and knows Parnall Law has stood up for, fought for, and given voice and value to his or her harm.

To bring in revenue that contributes to profit.

To grow referral sources.

RESULTS / OUTCOMES (What you must get done.)

- Bring in the required amount in attorney fees per year, or more.
- Bring in the required minimum in attorney fees in any one month.
- Achieve 95% positive reviews.
- Develop 3 new referral sources per year. (Referral source is recognized upon referral leading to new case.)
- Be available 8 hours per day, if not out of office at meetings, hearings, depos or trial.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Intakes

- Meet with clients to evaluate case for representation
- Take all facts pertinent to liability, damages, coverage
- Show compassion
- Posture case by articulating client and office action items
- Explain representation agreement and have sign
- Bring in paralegal

Investigation

- Evaluate needed investigation
- Communicate with paralegal about what investigation tasks need to be completed
- Determine if UM/UIM applies
- Posture the case for trial or negotiations

Correspondence

- Compose letters and requests

Negotiation

- Meet with clients to evaluate and get authorization to negotiate
- Negotiate with adjusters and keep client informed
- Prepare case for mediation

- Speak with adjusters, build and maintain negotiation relationships, aggressively negotiate and/or posture cases with adjusters where appropriate.
- Make determination about filing suit or further negotiations
- If filing suit, prepare client for litigation process

Litigation

- Draft pleadings and discovery for lawsuits
- Compose discovery responses
- Compose discovery requests
- Prepare case for trial, arbitration, and/or mediation

Position Descriptions

ATTORNEY STANDARDS

Standard: "Set up and established by authority as a rule for the measure of quantity, weight, extent, value or quality."

SKILLS

By "skilled," I mean: You are an articulate and clear thinker, speaker and writer, driven to engage in dialogue and debate in advocating our client's truth. You are fierce, strong, and wise in the zealous pursuit of the interests of our client. Diligence, persistence, creativity and intelligence guide you in winning the case. Organization, patience and thoughtful attention guide you in revealing the truth to all parties. You grow in aptitude, attitude, intelligence and confidence. The greater good depends on your bold and righteous stand for the injured, against the abuse of power. Your profession is your calling.

You are able to show a prospective client how we are the best choice in hiring a lawyer. You wisely guide the development of the claim through investigation of liability and documentation of damages. You professionally and effectively communicate with, and delegate to, support staff. You confirm the organization of the file and all case management tools. You effectively negotiate resolution of the claim with the adjuster. You effectively and economically litigate the case toward trial if necessary. Depositions and motions practice are pragmatic, professional and effective. You are prompt and thorough in resolving through mediation. Trial is an option that helps leverage negotiation. You hone your trial skills in appropriate, cases, winning substantial justice for our client.

PERFORMANCE

You measure your performance by client satisfaction and financial results. You are able to accomplish all steps and goals in the advocacy of a client's case, from initial intake, to investigation of liability, to counseling in treatment, to gathering medical records and bills, to the negotiation of a claim, to advancement in litigation, to successful advocacy at mediation, to substantial verdict at trial. Each step increases the claim's value, and your effectiveness as a lawyer. You are confident in your skill and content with your results, and our office is content as well. Your achievements are ever attaining new heights.

You sign up new clients.

You send demands out within one month of MMI.

You negotiate resolution within two months of demand.

You file complaints within one month of adjuster roadblock.

You schedule trial within two months of answer.

You effectively and timely depose witnesses in a way that sets up high leverage, or verdict.

You write winning, effective and economical motions that set up high leverage, and verdict.

You prepare thorough, comprehensive but simple mediation binders that compel high settlement.

You quickly accomplish disbursement.

You take cases to trial and win.

Position Descriptions

INTEGRITY

Your honesty is impeccable and unquestioned. Capable of withstanding criticism, you are unafraid to reveal mistakes large and small, and as a result grow from those mistakes. You confront difficult questions and issues head on with tact and skill. Inching forward our client's cause takes 100% fervor for 100% truth. Personal interests such as monetary gain, professional acclaim or other favor do not improperly influence your professionalism or your zeal.

You explain the potential weaknesses in a claim to new clients in a way that is helpful and truthful, but does not cause concern or confusion. You examine and explain potential weaknesses in a case in evaluation. You tell the staff what you need and want. You communicate your position clearly and persuasively to the adjuster, without anger or temper. You help other attorneys and ask other attorneys for help. You are unafraid to admit weakness or insufficient knowledge in key areas, and are willing to work to overcome these insufficiencies.

> In so doing, your credibility in the law grows immensely.
> You strive to improve.
> You are confident in your abilities and your intent.

FINANCIAL STABILITY

You are motivated to attain financial prosperity and stability. You have worthy, realistic and high goals in what you will earn from your cases. Your finances are personal, and you keep them organized and on track. The firm's growth and success depend on your growth and success. You use your financial success for good, practical and fun purposes. Money is not happiness. Money enables the achievement of happy and noble activities and lifestyle.

You earn enough to pay for your needs and to save for spending and for retirement. You bring in attorney fees as described in Attorney "RESULTS / OUTCOMES." You motivate yourself to bring in more than this.

You balance work with leisure, family and friends.

You are charitable in your attention and intent.

EXPERIENCE

You are an expert in your field. With years of experience as a trial lawyer, you have learned enough to take a case to trial and win. Eager to learn and develop all the skills of an effective trial lawyer, your ambition, vision and determination exceed the minutia. Each step in your growth becomes a bullet in your belt, and when you pull your guns, you speak with the authority of experience and skill. In several short years you will be teaching CLEs in your expertise.

You note everything learned in winning and losing.

You take CLEs often. They provide you an opportunity to listen to experts in different areas, with different angles.

Position Descriptions

You engage in arbitrations and other opportunities to develop and grow your voice and your style.

You become an engaging and engaged leader in your profession and community.

You help hone the firm's skills, systems and overall strategy for success, and in turn advance your entrepreneurial, legal, financial and professional interests.

You are an experienced and successful trial lawyer.