

# Position Description

## 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
- 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

#### **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
- E-Filing from court to File Center

#### **Data Entry**

- Post case and provider information into Needles

#### **Fill In: Reception**