

Position Descriptions

DOCUMENT CLERK

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. Opening Health Insurance subrogation claims when requested.
- Begin other tasks listed on “to-do office” sheet
- Entering client and tort names into the case in Needles, double checking for any conflicts. Alerting assigned attorney / paralegal of any potential conflicts immediately.
- Entering witness name, DOB, and contact information in the Witness Tab in Needles

Claims:

- If not open, call to report new claim
- If open, call to find out claim number and full contact information for assigned adjuster

Filing:

- Scanning all incoming mail, processing mail by saving to the client’s folder in FileCenter and forwarding to assigned paralegal.
- Electronic filing of all incoming documents in the appropriate place in FileCenter and naming all documents in accordance with the Naming Protocol.
- Double check that medical records/ evidence/ discovery are scanned in before filing
- Hard filing of original deposition transcripts.
- Saving all faxes to File Center and forward to the assigned paralegal
- Saving E-Filing from court to File Center

Data Entry

- Post case and provider information into Needles
- When new adjusters are assigned, updating Needles with full name and contact information.

Fill In: Reception