

**LAW OFFICE**  
**RUTHANN P. LACEY, P.C.**

*Concentrating in Elder and Special Needs Law*

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**Job Description: Administrative Assistant**  
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**ABOUT THE FIRM:** A traditional law practice is focused primarily upon functional expertise in a narrow legal practice area. The law firm of Ruthann P. Lacey, P.C. is involved in the practice of Elder and Special Needs Law which is a highly specialized area of the law. Our firm is client-centered and focused on the unique legal needs of the elderly, their families, and individuals of all ages with special needs. Our areas of legal services include: Disability Planning; Durable Advance Directive for Healthcare; Durable Financial Powers of Attorney; Guardianship and Conservatorship; Health Law; Independent Living Options; Long-Term Healthcare Options and Financing; Medicaid Estate Recovery; Medicaid Applications and Planning; Medicare Set-Aside Arrangements; Nursing Home Issues; Probate and Estate Administration; Real Property; Revocable and Irrevocable Trusts; Special Needs Trusts; Supplemental Security Income (SSI) Issues; Trusts and Wills; and VA Aid and Attendance Benefits.

Administrative Assistant position overview and requirements: Responsible for answering telephone; assisting clients, callers, guests, and firm members; preparing for client appointments; communicating with clients and firm members; maintaining accurate records; and supporting the firm's "Vision and Mission".

The person in this position:

1. Will pass a complete background check, consisting of credit, criminal and driving reporting
2. Will qualify for dishonesty bond coverage and sign Red Flag Rules for confidentiality
3. Is able to work a regular full time weekly schedule and is punctual
4. Possess a professional appearance, dress and demeanor
5. Is comfortable with heavy telephone work in a busy legal practice
6. Has an exceptional command of business writing and basic math skills
7. Has exceptional client skills, a desire to help others, is upbeat and is comfortable working with older people, people with disabilities, their families, and other professionals
8. Is a quick learner; has a good sense of humor; and is optimistic
9. Uses good common sense and independent judgment as a member of our legal team
10. Is proficient in Word Perfect, Amicus Attorney, Hot Docs, Windows, Excel, Power Point, proficient in use of the internet
11. Is a problem solver and independent thinker who is flexible and good at multi-tasking
12. Will be available for occasional evening or weekend time at educational, team building, or speaking events for the firm
13. Will perform duties while maintaining the highest standard of confidentiality for our clients
14. Does not manage others
15. Has a valid Georgia driver's license, a reliable vehicle and current insurance, as some local travel may be required
16. Will report directly to the manager assigned by the firm

## Administrative Assistant job description breakdown by daily responsibilities:

### Telephone:

1. Primary responder to answer telephone
2. Maintains and manages the firm calendar
3. Responsible for having telephone on line at office opening and placing telephone on night service at office closing
4. Record, implement and manage greetings on voice mail system
5. Maintain telephone section in employee instruction manual
6. Set up new employees on telephone system and instruct in use the telephone system
7. Assist callers and clients with information regarding services of the firm
8. Schedule and calendar appointments - confirm accuracy of calendar daily
9. Transfer calls as instructed and as appropriate
10. Retrieve Digital and BellSouth messages in general and attorney mail boxes; return calls or forward to intended recipient in firm
11. Confirm all scheduled appointments (for clients, vendors, and professionals) by telephone two business days in advance
12. Communicate by telephone with clients, courts, and other professionals regarding client matters as instructed; document and report results and outcomes to appropriate party

### Reception:

1. Have office open for business by 8:30 am daily: make sure door is unlocked and the porch and walk are clean and tidy; turn on all interior lights and ensure they are working; turn on music at appropriate level
2. Monitor and maintain office public areas and keep neat, clean and tidy throughout the day (reception area, refreshment area and rest rooms)
3. Cheerfully greet arriving clients and other visitors
4. Offer and serve beverages
5. Notify appropriate staff of the arrival of their client or visitor
6. Maintain and replenish printed materials and articles in reception and public areas
7. Maintain inventory of printed materials and articles to ensure supplies do not run out
8. Maintain and restock bar refrigerator, provide clean glassware for clients, and remove used glassware to kitchen dishwasher
9. Ready conference areas for client appointments as needed

### Office Administration:

1. Retrieve and process incoming mail from mailbox daily
2. Scan appropriate client information to the proper location of client file for team members
3. Process the mail and promptly deliver "hard copy" to appropriate "team member's in box" and place electronic copy in client's file
4. Collect morning and afternoon correspondence materials from team members to process outgoing mail
5. Appropriately produce, package and place correct postage materials for outgoing mail
6. Promptly deliver to USPS collection box or to FedEx drop box as appropriate
7. Check weekly and restock paper and other staple items in work room and all other offices
8. Maintain and report inventory to manager for reorder to ensure supplies do not run out
9. Develop office forms and procedures as necessary; recommend improvements in systems, procedures, client service, etc.
10. Responsible for maintaining firm's library - physical and electronic
11. Other administrative responsibilities for support of team members as assigned

## Administrative Assistant job description breakdown by daily responsibilities:

### Client Administration:

1. Maintain complete confidentiality for all client matters and comply with privacy act
2. Maintain current client and contact information in internal records
3. Produce and mail appointment letters
4. Open new client files:
  - Hard file - have complete paperwork in file
  - Computer file - set up file profile and include electronic copies to complete file
5. Prepare and maintain inventory of new client appointment packages, burgundy folders, and new client folders
6. Assist as witness in signing appointments as scheduled
7. Prepare "original document" package for client to take with them as they leave the signing appointment
8. Scan copy of client's original signed documents to client file
9. Print and mail after appointment and referral letters
10. Compose and mail personal notes (thank you, sympathy, etc) as required
11. Other administrative responsibilities for support of client as assigned by firm

SUMMARY: The above description is intended for general information purposes for the job requirements and duties of the Administrative Assistant's position. This is a dynamic position requiring the ability to demonstrate flexibility in multi-tasking and the use of common sense through understanding of our firm's policies as a member of our legal team. The person in this position will be able to meet established firm standards of professionalism while supporting Attorneys, Paralegals, and other staff members as we achieve specialized complex planning for our clients.

As the first point of contact for the law firm of Ruthann P. Lacey, P.C. – its not only just about duties like making coffee, typing letters, answering telephones, or ordering lunch or office supplies... if you worked here today you also need:

- judgement and strength as a gate keeper - knowledge, experience and understanding in working with complex situations and complex schedules
- to exude a positive image that reflects the firm well - a professional appearance and a professional attitude
- to be highly self motivated - work daily in high-energy, busy, demanding, dynamic legal environment
- to multitask - wear many hats at once - while working with people in need, juggling issues, paper and priorities
- excellent communication and interpersonal skills - communicate in an empathetic, courteous, positive and professional manner
- to possess outstanding organizational skills - attention to every detail and attend to each and every need - prioritize
- to deal with interruptions - understand and implement ways in which to manage those whose actions make the process complicated
- a knack for anticipating and solving problems - think on your feet, have patience, be a good listener and be able to direct the conversation for the desired outcome
- to deal effectively with difficult personalities and complex situations - to develop and maintain an understanding of the legal field's standards and language
- to be able to follow up and follow through - organize files - able to track and organize events, projects, and objectives
- excellent spelling, grammar and writing style skills - handle incoming and outgoing mail, correspondence, and maintain records, files, library, office inventory and materials
- to schedule and maintain preventative maintenance and maintain day to day operations - maintain and use policies, procedures, protocols and emergency procedures
- ability to maintain client confidentiality - “stay at arms length” and not discuss personal matters with clients or gossip with anyone
- to establish and maintain strong office etiquette - answer the telephone and greet visitors with a smile on your face - proper handling and transferring of callers
- ability to effectively screen calls, handle conflict and effectively deal with negativity - angry or upset callers - “converse and connect” in a positive manner with all callers
- ability to effectively and efficiently communicate complex information - effectively find applicable and appropriate solutions to situations as they arise
- knowledge of computer technology, filing, and data entry - strong working knowledge of Word Perfect, Amicus, Outlook, Excel, Hot Docs, etc.
- to be proficient in use of copiers, scanners, faxes, security cameras and security systems, telephone and answering systems, etc. - to have a good working understanding of the “tools of the trade” - including voice-mail, email, memos, etc...