



**Orange County Department of Education  
Human Resources Department  
Confidential Class Specification**

**Class Code: 5045**

**FLSA Status: Nonexempt  
Union Representation: Unrepresented**

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**Legal Secretary**

**GENERAL PURPOSE**

Under general supervision, performs difficult and highly responsible sensitive and confidential legal secretarial work for attorneys in OCDE's Legal Services department and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

Legal Secretaries perform a variety of difficult and highly responsible legal secretarial and administrative support tasks in a legal department that provides legal consultation, advice, and representation services for public school districts, community college districts, regional occupational programs, special education local planning areas, and all OCDE departments. Incumbents provide legal secretarial support to assigned attorneys and interact on behalf of attorneys with a wide variety of clients on legal matters that are often urgent and very sensitive in a varied and fast-paced environment. Work requires a thorough knowledge of legal procedures and terminology.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*This position description is intended to describe the general nature and level of work being performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.*

1. Transcribe and type legal pleadings, contracts, leases, agreements, resolutions, licenses, and a wide variety of other legal forms, correspondence, reports, and documents from dictation, rough copy, or notes, with minimum supervision by an attorney; prepare and assemble information into proper legal form following established procedures or general instructions; and proofread and correct forms, documents, and pleadings in order to assure accuracy of records and entry of information.
2. Keep current on filing and service time limits and deadlines; calendar appointments, meetings, hearings, depositions, court appearances, and document and filing deadlines for attorneys, using an electronic calendar system; type requests for production of legal documents; copy, email, fax, and arrange delivery of documents and exhibits; reserve conference rooms and coordinate arrangements, including catering for meetings, conferences, and training sessions.
3. Facilitate document management in response to Public Records Act (PRA) requests, subpoenas, and personnel and student records requests; review, process, and/or coordinate with relevant staff to ensure quality and timely response to requests; track due dates; review request; identify custodians of records; request, collect, and analyze records to identify exempt and privileged records; and categorize PRA requests.

4. Assist with assessment of e-Discovery needs and issues to implement appropriate Electronically Stored Information (ESI) procedures to preserve evidence; analyze a client's ESI system and storage for search capabilities; identify custodians of relevant ESI and develop litigation hold lists; work with information technology staff to perform appropriate searches; and identify and collect appropriate ESI.
5. Formulate searches for legal opinions maintained in internal legal database search external public agency databases for guidance documents; query and search online legal research systems for statutes and case law relevant to legal matters; and formulate searches on the internet for non-legal information.
6. Create and maintain a variety of legal files in order to provide easy access to records with limited direction or supervision; maintain active litigation/hearing, work, and research files; and archive files and purge inactive files in accordance with OCDE's records retention schedule.
7. Answer and screen a high volume of telephone calls, providing information and handling issues that often require sensitivity and the use of sound independent judgment; open, log, and route incoming and outgoing mail; make and confirm conference and travel arrangements.
8. Record and track attorney and paralegal time spent on special education legal matters in the legal billing system; invoice, track, and post payments; reconcile accounting records; and run a variety of legal time and billing reports.
9. Register attorneys for conferences and workshops; make and confirm travel arrangements, including flight, hotel, and car rental reservations; develop and complete itineraries, travel forms, and other related documentation; and compile and prepare reimbursement requests.
10. Review for accuracy and process invoices; prepare budget transfers, purchase requisitions, purchase orders, and contract request forms; order office supplies and equipment, maintain and restock office supply cabinets; and provide general office upkeep.

#### **OTHER DUTIES**

1. Assist in compiling, preparing, and reconciling division budget; draft preliminary reports; and monitor assigned budgets.
2. File legal documents with applicable courts or administrative agencies.
3. Participate in developing handbooks and reference guides for use by other legal secretaries.

#### **QUALIFICATIONS**

##### **Knowledge of:**

1. Legal terminology, forms, documents, and court/administrative agency rules, filing requirements, and timeframes used in legal practice and proceedings.
2. Federal and state e-discovery rules and processes.
3. Electronic legal research and legal billing software.
4. Legal reference materials and their contents.
5. Statutory deadlines for responding to and/or filing pleading documents.

6. Proper preparation of pleadings, briefs, and legal forms.
7. Law office administrative practices and procedures.
8. Principles and practices of sound business communication.
9. Correct English usage, including spelling, grammar, and punctuation.

**Ability and Skill to:**

1. Operate a computer, word processing software, and other standard office equipment; utilize redlining and document compare functions; and type accurately.
2. Organize, set priorities, and exercise sound independent judgment within areas of responsibility in accordance with laws, regulations, rules, and policies; and problem-solve routine administrative legal matters.
3. Organize, research, and maintain legal and office files and calendars with a high degree of accuracy.
4. Compose correspondence and prepare standard legal documents from brief instructions with high attention to detail and accuracy.
5. Communicate clearly and effectively, orally and in writing; prepare clear, accurate, and concise records and reports.
6. Plan and make event arrangements, including facility locations, food and refreshments, audiovisual equipment set up, and materials for distribution, with high attention to detail.
7. Maintain highly sensitive and confidential information and deal with sensitive and difficult situations.
8. Establish and maintain highly effective working relationships with OCDE executives, executives and legal counsel of agencies served by Legal Services, staff, outside legal counsel, litigants and claimants, and others encountered in the course of work.
9. Demonstrate attendance sufficient to complete the duties of the position as required.

**Education, Training, and Experience:**

A typical way of obtaining the knowledge, skills, and abilities outlined above is graduation from high school or passage of a high school equivalency test, and three (3) years of secretarial or clerical experience in a law office, or an equivalent combination of training and experience.

**PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

**Physical Demands**

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification perform deskwork for extended periods; read written and electronic materials; communicate clearly with those contacted through the course of work (typically in person, on the phone, and via email); and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces. May move items weighing up to 25 pounds.

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### **Mental Demands**

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve administrative problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform detailed work; work on multiple, concurrent tasks often with frequent interruptions; work under deadlines and meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Employees work under typical office conditions, and the noise level is usually quiet.

Created: 3/2025