# WILSON SOLICITORS LLP

# JOB DESCRIPTION

# Trainee Casework Assistant

A former trainee casework assistant writes;

*“It is difficult to talk about a typical day as a caseworker because the caseworker role is so varied. You will usually be the first point of contact for the client and will likely be the person they have the most contact with during their case. So typically you will spend a lot of time advising clients or taking their instructions, either over the phone or in face-to-face appointments. Otherwise you could be doing any number of different tasks including drafting pre-action letters, perusing relevant papers, drafting instructions for experts, making legal aid applications, preparing witness statements, negotiating with the other side or preparing bundles for court. You might also sometimes need to visit a detained client, attend a conference with counsel or go to court. It really does vary! You are also given quite a lot of responsibility early on which makes the role challenging and interesting and allows you to contribute meaningfully to the progress of cases.”*

## **1. CASE CONDUCT**

Definition:

Every case receives the optimum level of skill and level of professional competence.

Performance Standards:

Performance is satisfactory when:

1. advice and action is kept within the areas of competence as defined in the job description/person specification or the case is referred appropriately
2. the client’s case is attended diligently to achieve the best possible outcome
3. Case deadlines are achieved.

**2. CASE ADMINISTRATION**

Definition:

All cases are efficiently administered.

Performance Standards:

Performance is satisfactory when:

1. a case is opened, all information accurately and systematically recorded and the database is kept up to date
2. for complex cases a case plan is devised and kept updated
3. appropriate funding for the case is advised on, identified and obtained
4. all time expended on a matter is accurately recorded
5. if using the services of others you ensure that they are on the firm’s approved list and that their performance is monitored
6. the post holder complies with the file review procedure
7. all correspondence and communications is attended to in a timely fashion
8. all time is accurately recorded on the file and on the office computerised time recording software

**3. CLIENT CARE**

Definition:

All legal issues of a case are identified and the client receives regular reports on those issues. The client is informed of the strategy to be followed on his/her behalf and this advice is confirmed in writing.

All clients are treated to the highest possible professional standards including; adhering to meeting times, level of respect, courtesy and quality of advice.

All clients are informed of the complaints procedure and cost implications of their cases.

Performance Standards:

Performance is satisfactory when:

1. at the outset of the case the legal issues are established
2. you ensure that the client is kept updated on case progress
3. the client is informed in writing of the firm’s complaints procedure and you ensure that any complaints are processed in accordance with that procedure
4. the client is advised in writing at the outset of the case of the cost implications.
5. client confidentiality is maintained at all times
6. you comply with the SRA Code of Conduct 2011.

**4. SUPERVISION**

There is no supervisory role in the trainee casework assistant job description

# 5. COST MANAGEMENT

Definition:

Clients are advised of the most appropriate method of funding their cases, including public funding, conditional fees or on a private basis.

Where funded publicly, accurate claims for remuneration are made at the appropriate times in accordance with the Office Manual and LAA regulations.

Performance Standards:

Performance is satisfactory when:

1. the case is adequately funded
2. all internal financial controls and instructions are followed
3. files are given to admin support by the end of the week in which they conclude
4. private clients are asked for appropriate sums on account and interim bills are rendered at intervals agreed with the client
5. bills are checked for accuracy and not signed until you are satisfied that all is correct
6. all LAA returns are dealt with promptly
7. all disbursements are paid within 7 days of receipt of payment
8. reductions on bills submitted are considered and necessary appeals done in a timely fashion

# 6. OFFICE MANUAL

##### Definition:

Compliance from yourself and your staff with the issues outlined in the office manual where it affects your role.

##### Performance standards:

Performance is satisfactory when:

1. you are fully conversant with the Office Manual and its contents
2. you keep up-to-date with changes in the Manual
3. you communicate changes to the Manual to any staff you supervise and ensure that they understand the implications of those changes

### EDUCATION AND TRAINING

Definition:

Identification of education and training required to maintain professional and administrative skills, knowledge and competence.

##### Performance Standards

Performance is satisfactory when:

1. you identify your training requirements and request training through your supervisor

b) you undertake the minimum hours of training required to acquire and maintain your specialist area of knowledge