



ATTORNEY'S CLERK I

Bargaining Unit: CL Office Services

Class Code:
0558CL

COUNTY OF ORANGE

Established Date: 05/10/1985

Revision Date: 05/03/2024

DEFINITION:

Under supervision, to learn to perform specialized clerical work in the documentation of case files for attorneys in the District Attorney, Public Defender, and Child Support Services offices; to assist attorneys in the preparation of cases; and to do other work as required.

The Attorney's Clerk series includes the following:

Attorney's Clerk I (0558CL)

Attorney's Clerk II (0559CL)

CLASS CHARACTERISTICS:

Positions in this class learn to perform increasingly difficult legal clerical work in direct support of attorneys. Incumbents are expected to perform most duties with minimal clerical review and exercise increasing levels of discretion and initiative in the completion of assignments. The Attorney's Clerk I is an entry level class in the Attorney's Clerk series. The Attorney's Clerk I is distinguished from the Attorney Clerk II by the latter's ability to understand and apply a more extensive range of legal procedures related to the processing of legal documents and performing a wider range of the major functions of the office.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Inputs a variety of legal forms and documents from audio and video recordings, notes, rough drafts, police reports, general notes or oral instructions; refers to departmental guidelines, police reports and California Codes to determine correct format and language, and makes adaptations as necessary to specific situations; verifies that documents and forms prepared are in conformance with the facts of the case and the requirements of the court; uses discretion in determining documents/ steps needed from attorneys brief notes of last action.
2. Verifies the accuracy of legal references by locating citations and codes in online legal sources and reference books; selects data for inclusion in legal documents and follows rules and policies; interprets

legal term abbreviations; edits documents for grammar, punctuation and continuity of thought.

3. Assists attorneys by keeping them informed of court calendar dates, locating case files for court appearances, independently determining documentation needed and obtaining such documentation, preparing legal documents for submittal to court and ensuring filing deadlines are met; researches records in other offices to locate missing records/documents.
4. Maintains record of the status of cases; records calendared dates, pleas, trials, convictions, acquittals, sentences and dispositions of cases; maintains control over the flow of documents; maintains a court calendar for attorneys.
5. Receives calls from the public and visitors at the counter; responds to inquiries giving general information or locates an attorney to assist the caller; may deal with irate and emotional callers and visitors; takes messages and screens calls for attorneys; exercises discretion in the release of information and maintains confidentiality on all work performed.
6. Prepares case files on new cases; records subsequent actions on cases and maintains files; keeps statistics and may prepare statistical reports.
7. Determines the need for transportation and other orders, prepares request documentation, obtains Judge's signature and delivers to Court Clerk.
8. Prepares subpoenas for witnesses and forwards for processing; contacts witnesses, defendants, other agencies and the public to obtain information and/or advise of hearing schedules.
9. Performs other clerical duties such as payroll, cash handling records, scanning records and duplicating documents; assists with training of other clerical personnel.
10. Operates computer systems (agency, court and law enforcement) to prepare a variety of legal documents, maintain lists of cases and status, and maintain a system for tracking motion and notice due dates.

MINIMUM QUALIFICATIONS:

General Knowledge of

- Legal procedures and deadlines for the preparation and processing of legal documents for court OR preparation of documents following guidelines and meeting deadlines
- Legal terminology, evidence codes/requirements and Penal Code provisions
- Methods, practices and procedures within an office
- Correct language usage, writing and proofreading skills to include grammar, spelling, vocabulary, punctuation and sentence/paragraph structure
- Working independently, as part of a team, amongst multiple and varying activities

Ability to

- Understand and prioritize assigned tasks and duties to ensure essential functions and deadlines are met
- Perform legal clerical work accurately with minimal direction and within time constraints
- Learn to review attorney brief notes of previous actions to determine what clerical steps need to be taken and the deadline for completion of those steps
- Learn to read and understand laws, Penal Code sections and legal reference books to determine correct formats and extract/adapt language for legal documents
- Learn to extract pertinent data from files and other records to complete various legal documents
- Use patience and tact in dealing with the public to answer questions on court and office procedures and exercise discretion in handling confidential information
- Compose correspondence from general instructions, edit and correct written and dictated materials
- Type at a corrected rate of 45 words per minute
- Learn to operate computer and other electronic equipment to prepare a variety of legal documents and reports (may be required for some positions)
- Maintain files, records and statistics

Education and Experience

One year experience in direct clerical support to attorneys in the Orange County Public Defender, District Attorney office, or Child Support Services office.

Or

An equivalent combination of education, training and experience which would have developed the knowledge and abilities listed as minimum qualifications; including some experience in performing clerical duties in support of a civil or criminal justice system or legal clerical duties.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS***Physical and Mental Requirements***

Frequent walking, standing, sitting, kneeling, squatting, and twisting and bending at the waist. Ability to speak and hear well enough to communicate and take direction in person, over the telephone and in the courtroom. Ability to read standard text, fine print, various handwritings, view a computer monitor, and to drive. May be required to lift up to 25 pounds. Manual dexterity to handwrite and/or use a computer keyboard. Ability to perform daily tasks with independent body mobility, agility, and stamina sufficient to stand or sit, walk, stoop,

and bend routinely for prolonged periods. Ability to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard. Ability to independently reason and analyze data, and to reach objective conclusions. Ability to work under stressful conditions, deadlines, and competing priorities. Ability to work with other individuals successfully and collaboratively.

Environmental and Working Conditions

Essential functions require sufficient physical ability and mobility to work primarily in an office setting around machinery with stationary or moving parts. May have exposure to firearms from working near law enforcement professionals. May work in a non-standard field environment. May work in facilities with adult inmates and/or juveniles who may have multiple and complex health, social, and psychosocial needs. May interact with the public in emotional and occasional hostile situations. May be required to drive a County vehicle or use County-approved means of transportation for job-related travel.



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COUNTY OF ORANGE
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The Attorney's Clerk series includes the following:

Attorney's Clerk I (0558CL)
Attorney's Clerk II (0559CL)

CLASS CHARACTERISTICS:

Positions in this class learn to perform increasingly difficult legal clerical work in direct support of attorneys. Incumbents are expected to perform most duties with minimal clerical review and exercise increasing levels of discretion and initiative in the completion of assignments. The [Attorney's Clerk I](#) is an [entry level trainee class](#) in the Attorney's Clerk series. ~~The Attorney's Clerk I is distinguished from the Attorney Clerk II by the latter's ability to understand and apply a more extensive range of legal procedures related to the processing of legal documents and for Attorney Clerk II which is expected to handle more complex assignments and performing a wider range of the major functions of the office.~~

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. [Types-Inputs](#) a variety of legal forms and documents from [machine dictation audio and video recordings](#), [shorthand](#) notes, rough drafts, police reports, general notes or oral instructions; refers to departmental guidelines, police reports and California Codes to determine correct format and language, and makes adaptations as necessary to specific situations; verifies that documents and forms prepared are in conformance with the facts of the case and the requirements of the court; uses discretion in determining documents/ steps needed from attorneys brief notes of last action.

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2. Verifies the accuracy of legal references by locating [citations and codes](#) in [online legal sources and reference books](#); selects data for inclusion in legal documents and [interprets-follows](#) rules and policies; interprets legal term abbreviations; edits documents for grammar, punctuation and continuity of thought.
3. Assists attorneys by keeping them informed of court calendar dates, locating case files for court appearances, independently determining documentation needed and obtaining such documentation, preparing legal documents for submittal to court and ensuring filing deadlines are [met](#); researches records in other offices to locate missing records/documents.
4. Maintains record of the status of cases; records calendared dates, pleas, trials, convictions, acquittals, sentences and dispositions of cases; maintains control over the flow of documents; maintains a court calendar for attorneys.
5. Receives calls from the public and visitors at the counter; responds to inquiries giving general information or locates an attorney to assist the caller; may deal with irate and emotional callers and visitors; takes messages and screens calls for attorneys; exercises discretion in the release of information and maintains confidentiality on all work performed.
6. Prepares case files on new cases; records subsequent actions on cases and maintains files; keeps statistics and [prepares](#) statistical reports.
7. Determines the need for transportation [and other](#) orders, prepares request [forms documentation](#), obtains Judge's signature and delivers to Court Clerk.
8. Prepares subpoenas for witnesses and forwards for processing; contacts witnesses, defendants, other agencies and the public to obtain information and/or advise of [hearing schedules](#).
9. Performs other clerical duties such as payroll, [petty cash handling](#) records, [and scanning records and duplicating documents](#); assists with training of other clerical personnel.
10. ~~May operate~~ [a word/data processor computer systems \(agency, court and law enforcement\)](#) -to prepare a variety of legal documents, maintain lists of cases and status, and maintain a system for tracking motion and notice due dates.

MINIMUM QUALIFICATIONS:

General Knowledge of

- Legal procedures and deadlines for the preparation and processing of legal documents for court [OR preparation of documents following guidelines and meeting deadlines](#)
- Legal terminology, evidence codes/requirements and Penal Code provisions
- [Modern office methods](#), [and practices and procedures within of an law-office](#)
- Correct [English language](#) usage, [writing and proofreading skills to include](#) grammar, spelling, vocabulary, [and punctuation and sentence/paragraph structure](#)
- [Working independently, as part of a team, amongst multiple and varying activities](#)

Commented [EL2]: Concern this is an entry level and is difficult to find candidates with legal skill and experience. An active student or graduate with minimal job experience can learn and perform the ACI duties without experience in the legal field. My changes reflect these comments.

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Commented [JK4R2]: C&C recommends keeping legal terminology, etc... (for general knowledge)

Ability to

~~Understand the order of events in criminal or civil procedures and ensure that essential procedural requirements and deadlines are met. Understand and prioritize assigned tasks and duties to ensure essential functions and deadlines are met~~

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- Perform legal clerical work accurately with minimal direction and within time constraints
- Learn to review attorney brief notes of previous actions to determine what clerical steps need to be taken and the deadline for completion of those steps
- Learn to read and interpret-understand laws, Penal Code sections and legal reference books to determine correct formats and extract/adapt language for legal documents
- Learn to extract pertinent data from files and other records to complete various legal documents
- Use patience and tact in dealing with the public to answer questions on court and office procedures and exercise discretion in handling confidential information
- Compose correspondence from general instructions, edit and correct written and dictated materials
- Type at a corrected rate of 45 words per minute
- Learn to operate word/data-processing computer and other electronic equipment to prepare a variety of legal documents and reports (may be required for some positions)
- Maintain files, records and statistics

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Education and Experience

~~Either~~

One year experience in direct clerical support to attorneys in the Orange County Public Defender, ~~or~~ District Attorney office, or Child Support Services office.

Or

+

An equivalent combination of education, training and experience which would have developed the knowledges and abilities listed as minimum qualifications, ~~including some experience in performing clerical duties in support of a civil or criminal justice system or legal clerical duties~~ is desirable.

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PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Frequent walking, standing, sitting, kneeling, squatting, and twisting and bending at the waist. Ability to speak and hear well enough to communicate and take direction in person, over the telephone and in the courtroom. Ability to read standard text, fine print, various handwritings, view a computer monitor, and to drive. May be required to lift up to 25 pounds. Manual dexterity to handwrite and/or use a computer keyboard. Ability to perform daily tasks with independent body mobility, agility, and stamina sufficient to stand or sit, walk, stoop, and bend routinely for prolonged periods. Ability to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard. Ability to independently reason and analyze data, and to reach objective conclusions. Ability to work under stressful conditions, deadlines, and competing priorities. Ability to work with other individuals successfully and collaboratively.

Environmental and Working Conditions

Essential functions require sufficient physical ability and mobility to work primarily in an office setting around machinery with stationery or moving parts. May have exposure to firearms from working near law enforcement professionals. May work in a non-standard field environment. May work in facilities with adult inmates and/or juveniles who may have multiple and complex health, social, and psychosocial needs. May interact with the public in emotional and occasional hostile situations. May be required to drive a County vehicle or use County-approved means of transportation for job-related travel.

Refer to the Medical Standards within the Title Schematic.

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ATTORNEY'S CLERK II

Bargaining Unit: CL Office Services

Class Code:
0559CL

COUNTY OF ORANGE

Established Date: 07/26/1977

Revision Date: 05/03/2024

DEFINITION:

Under general supervision, to perform a wide range of difficult specialized clerical work in support of attorneys in the District Attorney, Public Defender, and Child Support Services offices; to assist attorneys in the preparation of cases; and to do other work as required.

The Attorney's Clerk series includes the following:

Attorney's Clerk I (0558CL)

Attorney's Clerk II (0559CL)

CLASS CHARACTERISTICS:

Positions in this class perform a wide range of difficult and specialized clerical work in direct support of attorneys. Incumbents are expected to perform most duties independently and exercise considerable discretion and initiative in the completion of assignments. The Attorney's Clerk II is the journey level class in the Attorney's Clerk series and is distinguished from the Attorney Clerk I entry level class by the ability to perform all major clerical support functions of the Public Defender, District Attorney and Child Support Services offices with minimal direction and by the performance of the more complex and specialized duties.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Types a variety of legal forms and documents from audio and video recordings, notes, rough drafts, police reports, general notes or oral instructions; refers to departmental guidelines, police reports and California Codes to determine correct format and language, and makes adaptations as necessary to specific situations; verifies that documents and forms prepared are in conformance with the facts of the case and the requirements of the court; uses discretion in determining documents/ steps needed from attorneys' brief notes of last action.
2. Verifies the accuracy of legal references by locating codes in legal online sources and reference books; selects data for inclusion in legal documents and follows rules and policies; interprets legal term

abbreviations; edits documents for grammar, punctuation and continuity of thought.

3. Assists attorneys by keeping them informed of court calendar dates, locating case files for court appearances, independently determining documentation needed and obtaining such documentation, preparing legal documents for submittal to court and ensuring filing deadlines are met; researches records in other offices to locate missing records/documents.
4. Maintains record of the status of cases; records calendared dates, pleas, trials, convictions, acquittals, sentences and dispositions of cases; maintains control over the flow of documents; maintains a court calendar for attorneys.
5. Receives calls from the public and visitors at the counter; responds to inquiries giving general information or locates an attorney to assist the caller; may deal with irate and emotional callers and visitors; takes messages and screens calls for attorneys; exercises discretion in the release of information and maintains confidentiality on all work performed.
6. Prepares case files on new cases; records subsequent actions on cases and maintains files; keeps statistics and may prepare statistical reports.
7. Determines the need for transportation and other orders, prepares request documentation, obtains Judge's signature and delivers to Court Clerk.
8. Prepares subpoenas for witnesses and forwards for processing. Contacts witnesses, defendants, other agencies and the public to obtain information and/or advise of hearing schedules.
9. Performs other clerical duties such as payroll, cash handling records, scanning and duplicating documents; assists with training of other clerical personnel.
10. Operates computer systems (agency, court and law enforcement) to prepare a variety of legal documents, maintain lists of cases and status, and maintain a system for tracking motion and notice due dates.
11. Assists with attorney/client conflict of interest checks to ensure cases are appropriately assigned.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Legal procedures and deadlines for the preparation and processing of legal documents for court
- Legal terminology, evidence codes/requirements and Penal Code provisions
- All functions of the Public Defender or District Attorney office and the clerical support requirements of each function

General Knowledge of

- Office methods and practices and procedures of a law office

- Correct English usage, grammar, spelling, vocabulary and punctuation

Ability to

- Perform all major clerical support functions of the Public Defender or District Attorney office with minimal direction
- Understand the order of events in criminal or civil procedures and ensure that essential procedural requirements and deadlines are met
- Perform work independently and perform complex legal clerical work accurately with minimal direction and within time constraints
- Review brief notes of previous actions to determine what clerical steps need to be taken and the deadline for completion of those steps
- Read and understand laws, Penal Code sections and legal reference books to determine correct formats and extract/adapt language for legal documents
- Extract pertinent data from files and other records to complete various legal documents
- Use patience and tact in dealing with the public to answer questions on court and office procedures and exercise discretion in handling confidential information
- Compose correspondence from general instructions, edit and correct written and dictated materials
- Type at a corrected rate of 45 words per minute
- Operate computer and other electronic equipment to prepare a variety of legal documents and reports (may be required for some positions)
- Maintain files, records and statistics

Education and Experience

One (1) year experience as an Attorney's Clerk I in the Orange County Public Defender, District Attorney, or Child Support Services office.

Or

Two (2) years experience in direct clerical support to attorneys in the Orange County Public Defender, District Attorney, or Child Support Services office.

Or

An equivalent combination of education, training and experience which would have developed the knowledge and abilities listed as minimum qualifications, including some experience in performing clerical duties in support of a civil or criminal justice system and legal clerical duties.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Frequent walking, standing, sitting, kneeling, squatting, and twisting and bending at the waist. Ability to speak and hear well enough to communicate and take directions in person, over the telephone and in the courtroom. Ability to read standard text, fine print, various handwritings, view a computer monitor, and to drive. May be required to lift up to 25 pounds. Manual dexterity to handwrite and/or use a computer keyboard. Ability to perform daily tasks with independent body mobility, agility, and stamina sufficient to stand or sit, walk, stoop, and bend routinely for prolonged periods. Ability to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard. Ability to independently reason and analyze data, and to reach objective conclusions. Ability to work under stressful conditions, deadlines, and competing priorities. Ability to work with other individuals successfully and collaboratively.

Environmental and Working Conditions

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Bargaining Unit: CL Office Services

Class Code:
0559CL

COUNTY OF ORANGE
Established Date: 07/26/1977
Revision Date:
[05/10/198505/03/2024](#)

DEFINITION:

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The Attorney's Clerk series includes the following:

Attorney's Clerk I (0558CL)
Attorney's Clerk II (0559CL)

CLASS CHARACTERISTICS:

Positions in this class perform a wide range of difficult and specialized clerical work in direct support of attorneys. Incumbents are expected to perform most duties independently and exercise considerable discretion and initiative in the completion of assignments. The Attorney's Clerk II is the journey level class in the Attorney's Clerk series and is distinguished from the Attorney Clerk I ~~trainee~~ entry level class by the ability to perform all major clerical support functions of the Public Defender, ~~or~~ District Attorney and Child Support Services offices with minimal direction and by the performance of the more complex and specialized duties.

Commented [EL1]: If trainee, why recruitment for ACII?

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. ~~Types-Inputs~~ a variety of legal forms and documents from machine dictation audio and video recordings, shorthand notes, rough drafts, police reports, general notes or oral instructions; refers to departmental guidelines, police reports and California Codes to determine correct format and language, and makes adaptations as necessary to specific situations; verifies that documents and forms prepared are in conformance with the facts of the case and the requirements of the court; uses discretion in determining documents/ steps needed from attorneys' brief notes of last action.

2. Verifies the accuracy of legal references by locating [citations codes](#) in legal [online sources and](#) reference books; selects data for inclusion in legal documents and [interprets-follows](#) rules and policies; interprets legal term abbreviations; edits documents for grammar, punctuation and continuity of thought.
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6. Prepares case files on new cases; records subsequent actions on cases and maintains files; keeps statistics and [may prepares](#) statistical reports.
7. Determines the need for transportation [and other](#) orders, prepares request [forms documentation](#), obtains Judge's signature and delivers to Court Clerk.
8. Prepares subpoenas for witnesses and forwards for processing. Contacts witnesses, defendants, other agencies and the public to obtain information and/or advise of [hearing scheduleing](#).
9. Performs other clerical duties such as payroll, [petty cash handling](#) records, [scanning](#) and duplicating documents; assists with training of other clerical personnel.
- ~~10.~~ [May operate a word/data processor computer systems \(agency, court and law enforcement\)](#) to prepare a variety of legal documents, maintain lists of cases and status, and maintain a system for tracking motion and notice due dates.
- ~~10.~~ [11. Assists with attorney/client conflict of interest checks to ensure cases are appropriately assigned.](#)

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MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Legal procedures and deadlines for the preparation and processing of legal documents for court
- Legal terminology, evidence codes/requirements and Penal Code provisions
- All functions of the Public Defender or District Attorney office and the clerical support requirements of each function

General Knowledge of

- ~~Modern~~ Office methods and practices and procedures of a law office
- Correct English usage, grammar, spelling, vocabulary and punctuation

Ability to

- Perform all major clerical support functions of the Public Defender or District Attorney office with minimal direction
- Understand the order of events in criminal or civil procedures and ensure that essential procedural requirements and deadlines are met
- Perform work independently and perform ~~difficult~~ complex legal clerical work accurately with minimal direction and within time constraints
- Review brief notes of previous actions to determine what clerical steps need to be taken and the deadline for completion of those steps
- Read and ~~interpret~~ understand laws, Penal Code sections and legal reference books to determine correct formats and extract/adapt language for legal documents
- Extract pertinent data from files and other records to complete various legal documents
- Use patience and tact in dealing with the public to answer questions on court and office procedures and exercise discretion in handling confidential information
- Compose correspondence from general instructions, edit and correct written and dictated materials
- Type at a corrected rate of 45 words per minute
- Operate ~~word/data processing~~ computer and other electronic equipment to prepare a variety of legal documents and reports (may be required for some positions)
- Maintain files, records and statistics

Education and Experience

~~Either I~~

One year experience as an Attorney's Clerk I in the Orange County Public Defender, ~~or~~ District Attorney, or Child Support Services office.

~~Or II~~

Two years experience in direct clerical support to attorneys in the Orange County Public Defender, ~~or~~ District Attorney, or Child Support Services office.

~~Or III~~

An equivalent combination of education, training and experience which would have developed the knowledge

and abilities listed as minimum qualifications, including some experience in performing clerical duties in support of a civil or criminal justice system and legal clerical duties.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Frequent walking, standing, sitting, kneeling, squatting, and twisting and bending at the waist. Ability to speak and hear well enough to communicate and take direction in person, over the telephone and in the courtroom. Ability to read standard text, fine print, various handwritings, view a computer monitor, and to drive. May be required to lift up to 25 pounds. Manual dexterity to handwrite and/or use a computer keyboard. Ability to perform daily tasks with independent body mobility, agility, and stamina sufficient to stand or sit, walk, stoop, and bend routinely for prolonged periods. Ability to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard. Ability to independently reason and analyze data, and to reach objective conclusions. Ability to work under stressful conditions, deadlines, and competing priorities. Ability to work with other individuals successfully and collaboratively.

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~~Refer to the Medical Standards within the Title Schematic.~~