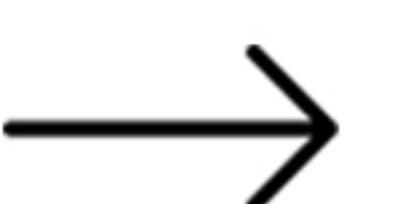




**OUTSOURCE ACCESS™**  
REDEFINING HOW YOU SCALE

# Legal Services (Personal Injury) Virtual Assistant Role Summary



## About Us:

Outsource Access is a comprehensive “business process outsourcing” and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their “Growth Partner” helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

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**[OutsourceAccess.com/process](https://OutsourceAccess.com/process)**



## Operations

- **Updating Treatment Status in NEEDLES and Litify**

Managing and maintaining accurate treatment status records within the NEEDLES and Litify platforms. It includes regularly updating and documenting the progress of client treatments, appointments, and related activities.

- **Initiating New Claims**

Initiating new claims within the legal case management system. It includes entering essential client and case information, assigning case numbers, and creating the foundational records necessary for efficient case handling. By accurately setting up new claims, this process contributes to organized case management and streamlined workflow for legal professionals.

- **Requesting Medical Records and Bills**

Requesting various medical documents and bills, including medical records, physician bills, EMS bills, and radiology bills. By initiating these requests, the necessary documentation for legal cases and claims can be obtained. This contributes to thorough and accurate case preparation and management within the legal context.

- **Communicating with Providers**

Maintaining effective communication with healthcare providers. It includes initiating follow-up calls and interactions to ensure a seamless exchange of information, document requests, and updates related to medical records, bills, and other case-related matters.

- **Draft and Send Standard Client Communications for Case Updates**

Drafting and dispatching standard client communications, elucidating case updates with precision and legal acumen. This crucial task ensures transparent and timely dissemination of pertinent information to clients, fostering trust and maintaining a robust attorney-client relationship.

## Administrative

- **Preparing Demand Packages**

Creating thorough demand packages for legal cases. It encompasses the meticulous compilation of all relevant documents, evidence, and essential information to present a compelling demand to opposing parties or insurance companies.

- **Sending Letter of Representation (LOR)**

Sending official Letters of Representation (LOR) to notify relevant parties, such as insurance companies or opposing parties, that legal representation has been established for a client. The LOR outlines the attorney-client relationship and asserts the legal rights of the represented individual.

- **Sending PIP Information Notice**

Preparing and transmitting Personal Injury Protection (PIP) Information Notices to appropriate parties. These notices serve to inform insurance companies, medical providers, and other involved entities about the commencement of a personal injury case and the client's intention to seek compensation for medical expenses.

- **Coordinating Attorney Schedules**

Managing and synchronizing the schedules of legal professionals, ensuring seamless coordination for client meetings, court appearances, and other critical engagements. This task is pivotal for optimizing attorney time, avoiding scheduling conflicts, and maintaining a structured workflow.

- **Monitoring and Responding to General Email Inquiries**

Overseeing and responding to general email inquiries, categorizing and prioritizing communication channels for optimal client engagement. This task is indispensable in fostering effective client communication, addressing inquiries with legal acumen, and upholding the firm's commitment to responsive and client-centric legal services.

### HR and Recruiting

- **Posting Job Openings for Legal Support Staff**

Broadcasting employment opportunities within the legal support sector, utilizing targeted language and platforms to attract qualified candidates. This task is pivotal for sourcing adept professionals essential to fortifying the legal team, ensuring a robust workforce dedicated to supporting the firm's personal injury legal services.

- **Preparing Onboarding Materials for New Hires**

Crafting comprehensive onboarding materials tailored to legal nuances, facilitating the seamless integration of new hires into the firm's personal injury legal practice. This task is imperative for cultivating a positive work environment, promoting swift acclimatization, and setting the stage for the success of incoming legal support staff.

- **Maintaining and Updating Legal Support Staff Records**

Curating and updating personnel records for legal support staff, adhering to privacy and compliance standards. This task is fundamental for preserving accurate employee information, facilitating HR processes, and ensuring the legal team operates within established regulatory frameworks.

- **Assisting in Tracking Attorneys' Billable Hours**

Collaborating in the systematic tracking of attorneys' billable hours, ensuring precise recording for client billing and financial reporting purposes. This task is critical for maintaining transparency, optimizing revenue streams, and supporting the financial health of the personal injury law firm.

- **Providing Support in Managing Employee Benefits**

Offering crucial support in the administration of employee benefits, encompassing health insurance and retirement plans within the legal services context. This task is essential for fostering employee satisfaction, promoting retention, and aligning the firm's benefits structure with industry standards in personal injury law.

### Bookkeeping, Billing, and Finance

- **Recording and Categorizing Case-Related Expenses**

Documenting and categorizing case-related expenses within the legal accounting system, employing precision in capturing disbursements for litigation, investigations, and client representation. This task is indispensable for maintaining financial transparency, ensuring accurate client billing, and upholding fiscal accountability in the intricate realm of legal services.

- **Generating and Sending Invoices to Clients**

Crafting and dispatching detailed invoices to clients, articulating legal services rendered, hours expended, and case-related expenses incurred. This task is pivotal for sustaining positive client relations, expediting revenue collection, and fostering trust through transparent communication in the context of personal injury law.

- **Preparing Financial Reports**

Presenting comprehensive financial reports delineating the firm's fiscal health, encompassing revenue, expenditures, and profitability metrics. This task is crucial for informed decision-making, strategic planning, and regulatory compliance, aligning financial practices with the nuanced dynamics of the legal services industry.

- **Reconciling Bank Statements with Financial Records**

Validating the accuracy of financial transactions recorded within the legal accounting system. This task is fundamental for financial integrity, facilitating audits, and ensuring alignment with legal and regulatory standards governing financial practices in personal injury law.

- **Monitoring and Managing Client Trust Accounts**

Overseeing and administering client trust accounts, adhering to ethical standards and legal obligations in safe guarding client funds. This task is imperative for maintaining client trust, complying with regulatory requirements, and upholding the integrity of client-attorney financial relationships within personal injury legal representation.

### Marketing

- **Scheduling and Posting Updates on Social Media Platforms**

Managing the firm's social media presence by scheduling and posting updates that engage and inform the audience, utilizing legal language to showcase the firm's expertise and maintain a professional online image

- **Coordinating and Promoting Events**

Coordinating and promoting legal events, utilizing legal terminology to highlight the firm's participation or hosting of conferences, webinars, or seminars. This task is vital for expanding the firm's network, establishing thought leadership, and attracting potential clients

- **Collecting Client Testimonials for Marketing Purposes**

Gathering and showcasing client testimonials using legal language, emphasizing client satisfaction and successful case outcomes. This task is essential for building credibility, fostering trust, and validating the firm's competence in providing exemplary legal services in areas such as personal injury law.

- **Implementing Basic SEO Strategies**

Applying foundational SEO strategies tailored to legal services, incorporating relevant legal keywords and optimizing content for search engines. This task is pivotal for improving the firm's online visibility, attracting potential clients actively searching for legal representation, and establishing a strong digital presence within the competitive legal landscape.

- **Assisting in Creating Educational Content for the Firms Website**

Assisting in crafting educational content for the firm's website, using legal terminology to produce informative articles, blog posts, or resources.

### Sales

- **Scheduling Initial Consultations**

Arranging preliminary consultations with prospective clients, utilizing legal terms to communicate the significance of the first client interaction. This task is crucial for initiating client relationships

- **Conducting Follow-Up Calls with Potential Clients**

Engaging in follow-up calls with potential clients, employing legal language to address inquiries, provide additional information, and foster ongoing communication. This task is essential for nurturing client relationships, addressing concerns, and maintaining the firm's commitment to client care.

- **Researching and Identifying Potential Leads for Personal Injury Cases**

Conducting comprehensive research to identify and qualify potential leads for personal injury cases, employing legal terminology to assess the viability of each case. This task is instrumental in expanding the firm's client base, targeting relevant legal opportunities, and strategically aligning with the firm's practice areas.

- **Updating and Maintaining the Firm's CRM system**

Updating and maintaining the firm's Customer Relationship Management (CRM) system, incorporating legal details to ensure accurate client information and case records. This task enhances organizational efficiency, streamlines client communications, and supports effective case management in the legal context.

- **Assist in Developing Client Retention Strategies and Initiatives**

Collaborating in the formulation of client retention strategies and initiatives, using legal insights to tailor approaches for personal injury clients. This task is vital for fostering long-term client relationships, ensuring satisfaction, and sustaining the firm's reputation in the competitive legal services landscape.

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