

JOB DESCRIPTION

Job Title: Case Handler	Date: August 2019
Location: Transactional Department	
Reporting to: Team Manager	
Functional responsibility to: The Whole Company	
Regular relationships: Conveyancer Team Manager	
Immediate subordinates: None	
Key Tasks & Activity	Standards of Performance
<p>1. Managing on a day to day basis a caseload within the Transactional Team which includes all aspects of the conveyancing transaction from instruction to completion, registration and closure of the file.</p> <ul style="list-style-type: none"> • Daily tasks to include: <ul style="list-style-type: none"> ○ taking instructions from the Conveyancer ○ carrying out instructions set via tasks set by the Conveyancer • Draft legal documents, to include: <ul style="list-style-type: none"> ○ Standard Precedent Letters ○ Contract Packs ○ Exchange letters ○ Freehold AP1s ○ freeform letters • Send faxes • Post Completion works to include: <ul style="list-style-type: none"> ○ preparing and sending applications to the Land Registry ○ Stamp Duty Land Tax submissions ○ file closures ○ checking account ledgers. 	<p>Accurate, timely and conscientious.</p>
<p>2. <u>Make telephone calls when requested</u></p> <ul style="list-style-type: none"> • Speak to clients and third parties • Save accurate telephone notes to OMS • Seek advice within team when necessary • Give messages via email to the appropriate person when necessary • Take telephone card payments for initial monies on account • Chase clients for welcome packs or general file progression. 	<p>Friendly and professional customer service attitude</p> <p>Accurate and detailed record keeping</p>
<p>3. <u>file 'housekeeping'</u></p> <ul style="list-style-type: none"> • To include working from reports to: <ul style="list-style-type: none"> ○ see if files are 'live' ○ chase files ○ ensure compliance ○ see if files can be archived. 	<p>When requested</p>

<p>4. <u>Apply for Searches</u></p> <ul style="list-style-type: none"> • To include: <ul style="list-style-type: none"> ○ Conveyancing Searches through online system ○ Land Registry Searches ○ Pre-completion Searches. 	<p>Accurately and timely</p>
<p>5. <u>Complete SDLT forms</u></p> <ul style="list-style-type: none"> • Complete SDLT forms online and correctly saving to the matter on OMS 	<p>Accurately and timely</p>
<p>6. <u>Logical management of key tasks</u></p> <ul style="list-style-type: none"> • Actively prioritise time-sensitive tasks 	<p>Daily</p>
<p>7. <u>Zetafax</u></p> <ul style="list-style-type: none"> • Check incoming faxes and save to correct OMS matter • Send faxes via Zetafax when requested. 	<p>Daily</p>
<p>8. <u>Sick/Holiday Cover</u></p> <ul style="list-style-type: none"> • Provide support to a Conveyancer or Case Handler due to holiday or sickness. 	<p>As and when required</p>
<p>9. <u>Problem Solving & Risk Assessment</u></p> <ul style="list-style-type: none"> • Deal with tasks which have been assigned to you but recognising if a task becomes more complicated than anticipated and to refer this back to the Conveyancer for Risk Assessment/Resolution. • Use your judgement in respect of the complexity of the issue at hand. 	<p>As required</p>
<p>10. <u>Communication</u></p> <ul style="list-style-type: none"> • Communicate with the rest of the team with a friendly professional attitude. • Update the Conveyancer or team when you have completed work/tasks (when appropriate). • Update the Conveyancer if you are unable to carry out a task and explain the reason. 	<p>Daily</p>
<p>11. <u>Team Issues</u></p> <ul style="list-style-type: none"> • Raise matters of concern with your Manager • Attend team meetings when required • Receive relevant information from your Manager via any means of communication 	<p>As required</p>
<p>12. <u>Performance Reviews</u></p> <ul style="list-style-type: none"> • Attend regular appraisals to include: <ul style="list-style-type: none"> ○ annual performance review ○ monthly one-to-ones to discuss your performance and development 	<p>As required</p>
<p>13. <u>Reinforce Company Values and Culture</u></p> <ul style="list-style-type: none"> • Have and maintain a positive attitude and flexible approach to your work and your colleagues. • Demonstrate a professional work ethic. • Excellent time keeping. 	<p>Daily</p>

<ul style="list-style-type: none"> Exhibiting a 'can do' attitude within the workplace. 	
<p>14. <u>Management Requests</u></p> <ul style="list-style-type: none"> Assist other departments as required by Management Team. 	As required
<p>5. <u>Other</u></p> <ul style="list-style-type: none"> Other duties and responsibilities as the role develops and the Company grows. 	
<p>Resources available</p> <ul style="list-style-type: none"> Desktop computer with Microsoft Office Package Various digital printers and scanners Telephone system with headsets if appropriate Use of e-mail and access to the internet for work purposes only Company Intranet and Public Folders 	
<p>Qualifications required</p> <ul style="list-style-type: none"> GCSE, or equivalent in Maths and English with a minimum grade C. A levels, or equivalent, in Maths and English with a minimum grade C. 	
<p>Skills Required</p> <ul style="list-style-type: none"> Relevant experience would be an advantage Knowledge and experience in Microsoft Office, especially Word, Excel and Outlook is essential Excellent communication skills, well-spoken and personable; able to get on with diverse personalities Friendly and approachable Reliable and consistent Helpful and positive attitude Flexible attitude to working practices and demands Responsible, professional and trustworthy Good time management and organisational skills Good literacy and computer skills, especially Word and Excel. Strong organisation, planning, problem-solving and multi-tasking skills Confident, resourceful and practical Self-motivated with the ability to work alone or within a team Personal commitment to equality and diversity 	
<p>Training</p> <p>Mandatory training such as AML, Customer Service and Data Protection will be provided by the company. External training is supported by the Company by prior agreement and where appropriate. Training will also be provided by the team manager where appropriate.</p>	
<p>Conditions:</p> <p>Working hours: Core hours are 9.00am to 5.30pm with 1 hour unpaid lunch break, however the office open between 8.00am to 7.00pm Monday to Friday, 9.30am to 4.30pm on Saturday and 10.00am to 3.30pm on Sunday. You will required to work to work 5 days and no more than 37.5 hours per week on a rota basis. The staff rota includes evening and Saturday working, you will be notified in advance.</p> <p>Holiday: 20 days holiday plus Bank Holidays</p> <p>Additional holiday days accrued at 1 day for every year's service in the annual leave year following completion of the 1 years' service increasing annually thereafter by one day up to a maximum of 5 additional days. Holiday year runs from 1st January to 31st December.</p> <p>Any holiday entitlement will be pro-rata for part-time employees.</p> <p>Pension: Enrolment into Company Workplace Pension Scheme 3 months after joining.</p>	

Company stakeholder pension scheme is also available.

Terms: Company Terms and Conditions of Employment and policies and procedures provide further details.

Note: **If you are a current employee transferring to a new position/department please see your letter of confirmation for changes in terms and conditions, if any.**