Position Description

POSITION TITLE: Membership Records Assistant

REPORTS TO: Membership Records Manager

SUPERVISES THE FOLLOWING POSITIONS:

SUMMARY FUNCTION: Provides assistance to Bar members relating to member information and membership fees. Performs related accounting functions.

<table>
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<tr>
<th>% of Time</th>
<th>Essential Duties and Responsibilities</th>
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<tbody>
<tr>
<td>30</td>
<td>Answers telephone calls and emails providing information on Bar member internally and externally. Assist callers with confirming members contact information and their membership status. Assists Bar members and the public in using the storefront portion of the Florida Bar s website.</td>
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<tr>
<td>30</td>
<td>Maintains member records by updating contact information. Updates member statuses i.e. judge codes, reinstatements, and deceased. Processes routine correspondence and documents communication with members/customers in Salesforce to enhance customer service.</td>
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<td>25</td>
<td>Processes membership fees. Process public records requests by coordinating such request with the Information Technology Dept. and corresponds with the requestor. Prepares affidavits regarding member records, as requested. Scan and upload fee statements and related documents into Laserfiche. Perform quality assurance on scanned images. Resolve all upload errors.</td>
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<td>10</td>
<td>Interprets and explains Rules Regulating the Florida Bar related to membership classifications, fees, and contact information. Proactively considers and recommends procedural changes as warranted and assists with updating the Membership Records desk manuals.</td>
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<td>5</td>
<td>Assists with special projects when assigned.</td>
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Non-Essential Duties and Responsibilities: Maintains paper supply for printer and fax machines.

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED FOR THE POSITION:

Knowledge of:
- Computer software and the Internet
- Professional office procedures and practices
- Basic accounting practices

Skilled in:
- MS Word
- MS Excel
- Databases and other computer programs
- Data entry
- Typing
- Professional telephone and e-mail etiquette
- Professional customer service

Ability to:
- Communicate effectively and professionally both verbally and in writing including being able to use correct spelling, punctuation and grammar.
- Multi-task and prioritize work
- Demonstrate initiative in group projects and individual settings
- Tactfully manage difficult situations
- Operate well under pressure and in a team atmosphere
- Consistently provide an excellent service oriented attitude
- Type 35 cwpm (correct words per minute)
- Pay close attention to detail
- Learn TFB Rules and regulations

MINIMUM EDUCATION AND WORK REQUIRED FOR THE POSITION:

Required Minimum Education:
High School Diploma (or its equivalency).

Required Minimum Professional Work Experience:
One to three (1-3) years of bookkeeping, accounting, finance or business experience. Customer service experience.

Required Licensure Certification(s):
N/A

Other Job Related Requirements for the Position (e.g., work schedule, physical and mental requirements, language requirements, overtime, travel, use of equipment/machines, etc.):
- Ability to sit for long periods of time, hear and converse over the telephone, and key/work frequently on a computer.
- Ability to lift 5 to 10 lbs.

Additional Information:
Bachelor's Degree in Accounting or Finance preferred, but not required (proof of degree required at interview). Appropriate degree may substitute for experience.
This job description is not a contract for employment and The Florida Bar reserves the right to make any necessary revisions on the job description at any time without notice.