

## **JOB DESCRIPTION**

**Job Title:** Funding Assistant

**Department:** Support

**Reports to:** Client Liaison Manager/Operation Support Manager

### **Job Summary:**

We are looking for a Funding Assistant to work alongside our Client Liaison Manager dealing with all aspects of the Client funding process using Proclaim Case Management System.

The person must possess the highest level of attention to detail, strong organisation skills and be dedicated to customer service and support of both our Clients and Fee Earners.

The role will support Fee Earners in the setting up of cases and providing them with the knowledge that all of the appropriate pre-funding checks and enquires have been carried out and ultimately that the case has suitable funding in place for the Fee Earner to continue to deal with the medical negligence investigation process.

### **Key tasks and accountabilities:**

- Setting up files
- Downloading signed CFA Funding Docs from Portal
- Checking Client's ID/Money Laundering details
- Disseminating GP/Hospital Application Forms to the Medical Records Team
- Making appropriate enquiries with Clients to ascertain if any Legal Expenses
- Completing & submitting Claims Forms with relevant Insurers
- Liaising with Clients to advise on outcome of Legal Expenses enquiries
- Liaising with Fee Earners to accept After the Event Insurance
- Sending ATE Policy Schedules to Clients
- Dealing with Client funding queries via telephone & e-mail
- Updating Case Management System with any changes to the Client Details
- Assisting with other administrative duties as the business requires

### **Person Specification:**

- Strong organisation skills and attention to detail
- Excellent written and verbal communication skills
- Good level of IT skills and use of Case Management Systems (Desirable but training will be provided)
- Willing to go above and beyond for client care
- Professional attitude