

## **BILLING ASSISTANT JOB DESCRIPTION**

*(revised 10/2023)*

**Job Title:** Billing Assistant  
**Reports To:** Comptroller, with dotted-line to the Director of Administration  
**FLSA Status:** Non-Exempt  
**Full/Part Time:** Full Time

**SUMMARY:** This role assists the Billing Coordinator in executing the Firm's billing process. The ideal candidate will have legal billing experience in a midsized to large law firm. The Billing Assistant will be required to provide ongoing support to the billing department by providing assistance with a variety of clerical-related duties, including but not limited to, assisting with editing and maintaining prebills, updating budgetary information, invoice submission, and other duties related to the monthly billing cycle.

### **JOB RESPONSIBILITIES**

- Review and modify bill drafts, verifying the accuracy of data and correcting any errors, while tracking progress throughout billing cycle
- Finalize bill drafts, and send to clients via email and/or the billing software/platform
- Perform general bookkeeping work, which may include entering data and maintaining records, invoices, and supporting documents
- Communicate with clients using available channels regarding client bills
- Assist with month- and year-end close process for the billing department
- Monitor and approve New Matter Report information into the legal billing software
- Research and respond to requests from clients and Firm staff and management
- Produce standardized and ad hoc reports, as requested
- Update billing rates and client information, as needed, in the billing software/platform
- Coordinate with the Records Manager to close client files
- Demonstrate a high level of ethical conduct and maintain confidentiality of client information
- Perform other related duties, as assigned

### **KNOWLEDGE, SKILLS AND ABILITY**

- Knowledge of billing and financial concepts
- Aptitude for working with numbers
- Ability to anticipate work needs and follow through with minimal direction; follow up on own initiative
- Ability to quickly learn and integrate new technical skills and knowledge; seek out avenues to enhance technical skills
- Ability to research and resolve errors or discrepancies, effectively and efficiently
- Ability to prioritize, organize workflow, and use time efficiently
- Ability to show exceptional attention to detail, as well as strength in the area of proofreading
- Ability to perform at high levels in a fast-paced, ever-changing work environment and to pivot quickly, responding with flexibility to changing priorities and work demands
- Possess strong customer service orientation; ability to work and communicate with all levels of internal and external clients

**QUALIFICATIONS**

- Minimum of 2-4 years of hands-on billing experience; 2 years in a law firm environment preferred
- Experience with law firm accounting/time and billing software; SurePoint preferred
- High school diploma or equivalent required; AA degree preferred
- Proficient in O365 with advanced Excel skills
- Advanced communication skills