

OFFICE OF INVESTIGATIVE AND LEGAL SERVICES
Legal Assistant 3 In-Training Plan
Starting from a promotional/probationary appointment LA2

Goal of In-Training:

To provide a structured training plan, set expectations, and encourage, train and place employee in a Legal Assistant 3 position in the Department of Health, Health Services Quality Assurance Division, Office of Investigative and Legal Services in Tumwater. At the successful completion of the in-training period, it is expected that employee will be able to completely perform the duties of a Legal Assistant 3 for this office supporting up to seven staff attorneys.

Length of In-Training: Month/Day/Year – Month/Day/Year

This is a twelve-month training plan. The Legal Assistant 2 will be the initial classification where training and mentoring will take place. Upon successful completion of the 12-month in-training requirements and achievement of the necessary knowledge, skills, and abilities to perform at the Legal Assistant 3 level, employee will promote to a Legal Assistant 3 in the Department of Health, Health Services Quality Assurance Division, Office of Investigative and Legal Services in Tumwater.

Probationary/Trial Service: Concurrently, a six (6) month probationary or trial service is required for the promotional/initial appointment to the class of Legal Assistant 2 and in-training appointment to the class of Legal Assistant 3. A mid-cycle interim feedback will be conducted by Month/Day/Year.

Duties, Responsibilities and Competencies of Goal Classification:

The duties, responsibilities and competencies required of this Legal Assistant 3 position in the Office of Investigative and Legal Services is outlined in the Position Description Form for this position that has been provided.

On-the-job Training:

Training accomplished by completing assignments for the job as they occur. The Legal Assistant 2 will begin orientation by working with a designated mentor and/or their supervisor. As the new Legal Assistant gains knowledge and demonstrates competency, additional case work will be assigned by LA3 mentor and/or supervisor. Work product will be reviewed by the assigned mentor first, then reviewed and approved by the supervisor if necessary. An approximate timeline regarding the anticipated training is outlined below:

Training	Date Completed
Complete New Employee Orientation (NEO): Includes both (DOH Virtual NEO and HSQA Virtual NEO.	

1 WEEK GOAL: Introduction to Position and General Processes:

- Introduction to OILS and select HSQA staff with whom we work (unless already a DOH, OILS employee).
- General Onboarding:
 - HR Required Paperwork
 - Review and Execution of Position Description, Confidentiality Statement and Annual Checklist
 - Telephones: Personal Line and 236-4902 Customer Service Line
 - Outlook:
 - Email:
 - DOH signature block
 - Spam emails
 - Distribution lists
 - Calendars:
 - Team calendars
 - Other calendars
 - Printers/copy machines, envelope printer, postage machine, mail process, labels, etc.
 - Adobe Acrobat DC
 - Adobe Sign Overview
 - Box.com
 - Learning Center: DOH required training (should have access 3-5 days from date of hire)
- Introduction and/or training on the following:
 - Legal Assistant 3 Desk Manual
 - ILRS (Integrated Licensing Regulatory System)
 - Proofreading Guide
 - PTA (Positive Time & Attendance Form)
 - SharePoint: /OILS SharePoint Page, Rosters and Lists, Desk Manuals and other necessary websites and databases
 - S: drive,
 - DOH/HSQA processes and procedures and OILS protocols
 - What we do, how and why
 - Difference between Secretary/Board/Commission and why that's important

0-2 MONTH GOAL: BASIC SKILLS AND UNDERSTANDING OF CORE PROCESSES

- Review roles of Complaint Intake, Case Managers, Investigators, and Staff Attorneys
- Review roles of Attorney General’s Office
- Meet and Greet with ACO (Adjudicative Clerk’s Office)
- Train and learn the following core/expanded competencies:
 - ILRS (Integrated Licensing Regulatory System)
 - Credential and Contact View Screen
 - Queue
 - Searching for Case/Master Case
 - Adding a Contact
 - Time Tracker for Billing
 - Audit Trail
 - DOH/HSQA processes and procedures and OILS protocols
 - OILS overview and the steps we take that result in disciplinary action on a case.
 - Difference between Secretary/Board/Commission and why that’s important
 - Overview on different Boards/Commission
 - Attend selected board/commission meetings
 - Overview on Secretary Cases
 - Observe Case Management Team (CMT) Meeting via Teams
 - Case/Master Case file anatomy
 - Opening Master Cases as assigned by LA3 mentor and/or supervisor:
 - Understand difference between Case/Master Case
 - Notice of Decision - NOD
 - Statement of Allegations - SOA
 - Statement of Charges - SOC
 - Notice of Intent - NOI

3 MONTH GOAL: DEMONSTRATE WORKING KNOWLEDGE OF THE OFFICE OF INVESTIGATIVE AND LEGAL SERVICES WITHIN HSQA

- Final formatting and processing of the following legal documents as assigned by LA3 mentor and/or supervisor:
 - Notice of Correction for Continuing Education and NOC
 - Notice of Required Evaluation Mental, Physical & Substance
 - Notice of Decision
 - Notice of Determination w/ BAP
 - Reassigning Staff Attorney
 - Closures
 - Where to locate files and follow ups with staff to obtain them
 - Litigation Mailbox
- Expand training and continue mastering previous materials

<ul style="list-style-type: none"> ○ Opening Master Cases for NODs, SOA, SOC, NOI ○ ILRS (Integrated Licensing Regulatory System) 	
<p>4 MONTH GOAL: DEMONSTRATE WORKING KNOWLEDGE OF THE OFFICE OF INVESTIGATIVE AND LEGAL SERVICES WITHIN HSQA</p> <hr/> <ul style="list-style-type: none"> ● Final formatting and processing of the following legal documents as assigned by LA3 mentor and/or supervisor: <ul style="list-style-type: none"> ○ Orders of Completions/Terminations ○ Statement of Allegations and Stipulations ○ 170(2) Mental/Physical Examination Orders ● Training on sending expert witness notebooks and materials to Board/Commission members in disciplinary cases ● Training on Evidence Transfers and assigning Order of Completion/Termination cases from compliance ● Training on Updated Case Dispo and Sanction’s Worksheets ● Observe CMT Meeting via Teams 	
<p>5 –6 MONTH GOAL: DEMONSTRATE WORKING KNOWLEDGE OF THE OFFICE OF INVESTIGATIVE AND LEGAL SERVICES WITHIN HSQA</p> <hr/> <ul style="list-style-type: none"> ● Final formatting and processing of the following legal documents as assigned by LA3 mentor and/or supervisor: <ul style="list-style-type: none"> ○ Statement of Charges & Agreed Orders ○ Sex Transfer Cases (MQAC/NQAC) ○ Defaults/Waivers ○ Notice of Intent to Cease and Desist & Agreed Orders ○ Request for Attorney General Service - RAGS <ul style="list-style-type: none"> ▪ Scanning documents & utilizing Box ○ Copy Center Request Evidence to RCM/RBM members and Informal Discovery to opposing counsel via Box ○ Brief Adjudicative Proceeding - BAP ● Training on assigning Defaults to PL’s ● Observe CMT meeting via MS Teams ● Attend selected board/commission meetings ● Receive Staff Attorney Assignments 	

<p>7-9 MONTH GOAL: DEMONSTRATE LEGAL ASSISTANT 3 SKILLS TO WORK A CASE EFFICIENTLY AND THOROUGHLY</p> <ul style="list-style-type: none"> • Should be effectively managing cases, final formatting and processing of routine legal documents • Continue managing an increasingly complex caseload based on Supervisor approval • Establish priorities in terms of overall caseload 	
<p>10-12 MONTH GOAL: CONTINUE TO DEMONSTRATE LEGAL ASSISTANT 3 SKILLS TO SEE PROCESSES ARE COMPLETED EFFICIENTLY AND THOROUGHLY GIVEN GREATER VOLUME/COMPLEXITY</p> <ul style="list-style-type: none"> • Prepare for greater degree of independence as Legal Assistant 3; prepare for greater role and responsibility which may include serving as a resource on special projects, quality improvement work groups and other activities as called upon. 	

Review Process: Communication with supervisor/mentor is critical during this training period. Interim reviews will be conducted three, six and nine months after the start date at which time your progress will be assessed. If necessary, additional review sessions may be called to address immediate performance concerns. Your supervisor will conduct the review sessions, and feedback from your assigned attorneys, mentors, office management, and support staff will be taken into consideration.

The purpose of the review session is to discuss performance openly and candidly to date. Employee is expected to actively participate in the process by discussing performance, areas that need improvement and sharing in their own evaluation of their performance. Together with employee's supervisor, they will determine how to best assist in achieving proficiency in the areas defined. This three-month review shall in no way take the place of ongoing interaction between the assigned attorneys, and OILS legal assistant mentors.

Extension of Training Period: In the event that required training has not been satisfactorily completed, or satisfactory proficiency levels have not been attained, the training period may be extended by mutual agreement of the employee, supervisor, Operations Manager and HR Consultant.

Completion of Training Period: Successful completion of the training plan and period will be a collaborative determination of the employee, supervisor, and Operations Manager. At the conclusion of the training period, it is the expectation that the employee be able to independently perform the duties of the goal classification.

Approval of Training Plan:

/s/Erin Eychaner

Human Resources Consultant

I have read and reviewed this training plan with my supervisor, and I agree to its terms and conditions.

Employee	Date	Supervisor	Date
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