

## Case Analyst/Paralegal –

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**Summary** The Case Analyst/Paralegal has primary responsibility for case management during the confirmation process, including preparation for and conducting of §341 meetings, court call preparation and docketing, and post-confirmation review.

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**Qualifications** Candidates must have the following skills to qualify for this position: Possession of comprehensive knowledge and understanding of complicated subjects, such as accounting or the like; ability to use higher level mathematics, statistics, and computer science; ability to solve non-routine, complex problems; ability to work independently with minimal supervision; communicates effectively on both an oral and written basis; enjoys daily contact with office staff and customers; good customer service skills. Ability to process a high volume of accurate, detailed and quality work product; and ability to work under stress.

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**Education requirements** A paralegal certificate and/or Bachelor’s degree;

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**Classification** Case Analyst/Paralegal are non-exempt employees.

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**Organization** Case Analyst/Paralegal are members of the confirmation process team and operate with minimal supervision in most job responsibilities. The Managing Attorney provides coaching and feedback.

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## Case Analyst/Paralegal – Continued

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**Compensation** This position is in wage class O and receives compensation within the salary range established for this grade. Compensation is adjusted subject to the guidelines of the performance appraisal system.

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**Cumulative responsibilities** Employees may be asked to perform any paralegal, client services or case administrator responsibility as dictated by office needs.

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**Appraisal** Paralegals meet with the Managing Attorney regularly to determine levels of proficiency in assigned tasks and additional training or guidance needed to perform their job responsibilities.

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**Training** Training is provided in partnership with our employees to help them develop the knowledge and skills required to progress to higher job levels. We encourage appropriate training in a supportive, cooperative learning environment.

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# Essential Functions

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**Overview** The essential functions of the Case Analyst/Paralegal include but are not limited to the following responsibilities:

**Plan amendments** Plan amendment responsibilities:

- enters plan information from amendments;
- processes amendments; and
- forwards documents to other staff as necessary.

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**Claim entry** Claim entry responsibilities:

- processes unsecured, secured, priority, amended, supplemental claims and claims with mortgage issues when needed or expressly by court order;
- enters data in our computer system so that the fields contain the correct information from the proofs of claim;
- adds creditor addresses as required without duplication in our database; and
- verifies the data entered on our computer system.

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**Motions** Set weekly court motions:

- creates reports to select cases for possible court motions only where confirmation has been denied;
- creates motions; and
- enters a docket in the case.

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**Plan analysis** Plan analysis responsibilities:

- enters plan information in our database to ensure correct disbursement;
- process cases.

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**Draft orders to follow** Draft order to follow responsibilities:

- enters orders on our computer system as they are received; and
- works with other staff, Bankruptcy court clerks, and attorneys to ensure that we receive the orders within the time frame specified by the judge.

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## Essential Functions, Continued

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### **§341 meetings**

§341 meeting responsibilities:

- conducts §341 meetings;
  - utilizes the quick meeting procedure when possible;
  - determines if plans meet standards for confirmation;
  - prepares required plan amendments;
  - makes concise meeting notes; and
  - ensures that plans can be administered.
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### **Docket**

Docket responsibilities:

- accurately enters in the computer system the results of all matters presented in court within two business days of each court call;
  - updates debt records as required to effectuate court orders within two days of receipt of the order;
  - makes docket entries reflecting telephone inquiries, correspondence received, and other information that may be useful or necessary in the case;
  - makes entries in the disbursement exceptions database for cases that need special attention or must be placed on hold; and
  - uses the case status modification database to request necessary changes to case status.
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### **Document management**

Manage documents received through the mail and at court:

- processes documents;
  - makes docket entries on our computer system to record the receipt of schedules, plans, motions, amendments and orders;
  - processes draft to follow orders;
  - forwards documents to other staff members as necessary; and
  - files documents in their case file.
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### **Case analysis**

Case analysis responsibilities:

- audits confirmed cases before the first disbursement date; and
  - makes required adjustments so that funds are disbursed properly.
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## Essential Functions, Continued

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### **Court call**

Court call responsibilities:

- communicates with judges, Bankruptcy Court clerks, debtor and creditor attorneys;
  - becomes familiar with court call requirements of judges assigned to our trusteeship;
  - prepares materials for our staff attorneys as needed;
  - prepares and send confirmation packets and trustee motions to judges; and
  - prepares call listings for court dates.
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### **Phone services**

Phone service responsibilities:

- provide courteous, knowledgeable and efficient telephone service to each customer during every call;
  - logs on to the ACD phone system at a prescribed time;
  - answers all calls within your assigned shift;
  - follows up on telephone inquiries; and
  - generates, mails or faxes case information as needed.
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### **Forms management**

Forms management responsibilities:

- identify forms or documents which need modification; and
  - notify Managing Attorney of forms that need to be added or modified.
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## Other Responsibilities

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**Non-departmental duties**

Non-departmental responsibilities:

- serve as backup to the Case Administrators and client services representative; and
  - perform any other clerical or administrative work task assigned by the Trustee, or Managing Attorney.
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