

<b>Job Title</b>	Estate Administration Clerk	CL - 25

**Job Summary**

Estate Administration Clerks are responsible for maintaining and processing case information, pleadings, responses, and managing the progression of cases from opening to final disposition, in accordance with approved internal controls, procedures, and rules. Responsibilities include noticing, managing the progression of cases, maintaining internal case records, monitoring the completion of required procedural steps, preparing case documents for review and submission, reviewing filed documents to determine conformity, and taking any appropriate action.

**Representative Duties Include but are not limited to**

- Conduct analysis of petition, schedules, and court file to determine the nature and accuracy of filings in cases prior to the first meeting of creditors. Draft proposed responses or recommendations for the division chief or staff attorney based on analysis and investigation performed.
- Prepare documentation and exhibits for use in evidentiary hearings.
- Assist with duties in pending cases including the review of quarterly trustee reports, final trustee reports, and reports of distribution. Contact Trustees concerning documentation and requirements in final trustee reports, as required. Contact third parties for confirmation of final reports and reports of distribution, using appropriate discretion.
- Prepare reports and statistical information for submission to the Bankruptcy Administrator based on analysis of quarterly and final trustee reports.
- Maintain records and statistical information concerning Trustee bonding and collateralization requirements in cases.
- Perform review of applications for compensation and expense, as well as applications for approval of employment in cases under any Chapter, as directed.
- Maintain a docket or calendar of cases assigned, and adhere to time limitations and deadlines established for various proceedings.
- Maintain statistical information regarding the number, type, and status of bankruptcy cases. Generate periodic reports of statistical information for submission to the Bankruptcy Administrator.
- Maintain a log of litigation functions performed in a divisional office, such as a Motion Log or similar.
- Maintain a log and copies of all meeting of creditor tapes and provide copies of tapes to parties and the public upon request.
- Perform other related duties as assigned.

**Factor 1 – Required Competencies (Knowledge, Skills, and Abilities)**

**Court Operations**

- Knowledge of the Bankruptcy Code and Rules and bankruptcy procedures, including local practices, rules, and procedures. Knowledge of legal terminology. Knowledge of all document types and document order in Bankruptcy proceedings. Knowledge of how cases proceed through the court. Ability to examine a variety and volume of information and detect deficiencies and errors. Skill and accuracy in mathematical calculations and data entry. Skill in entering data and creating docket entries in a database. Skill in determining appropriate course of action in a case. Skill in entering creditors and claims disposition into a database. Knowledge of court calendars and dockets. Ability to draft timely and accurate motions, objections, and statement of reviews, without direct supervision. Skill in determining appropriate course of action for disposition of case. Knowledge of where to distribute documents. Knowledge of requirements for making statistical and operational reports to the Administrative Office. Ability to organize work and establish work priorities. Ability to

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independently maintain a docket and meet deadlines imposed by the Bankruptcy Code and Rules, or local procedures, and ensure timely administration of cases.

**Judgment and Ethics**

- Knowledge of and compliance with the *Code of Conduct for Judicial Employees* and court confidentiality requirements. Ability to consistently demonstrate sound ethics and judgment.

**Written and Oral Communication/Interaction**

- Ability to communicate effectively (orally and in writing) to individuals and groups to provide information and advise filers of errors. Ability to communicate with parties and answer procedural questions without providing legal advice.
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**Information Technology**

- Skill in typing and use of word processing equipment. Knowledge of requisite court computer programs. Ability to use office equipment. Skill in using automated systems and equipment to review dockets and documents. Skill in using automated case management systems.

**Factor 2 – Primary Job Focus and Scope**

The primary focus of the job is to monitor the quality and accuracy of filings in bankruptcy cases, ensuring compliance with requirements, regulations, and policies. The job focuses on monitoring the timely and accurate progress of cases from opening to closing to ensure their orderly and efficient movement through the court. This position is critical in moving a case through the judicial system and impacts the perception of the public as to the efficiency and effectiveness of the judicial process. Errors by this position may have the ultimate consequence of affecting the outcome of a legal matter. Any error in judgment will affect the ability of the system to process the case timely, and could have an effect on the perception of the court to the national body governing the courts. Additionally, any errors may reflect negatively upon the particular chambers where the case resides.

**Factor 3 – Complexity and Decision Making**

Estate Administration Clerks monitor and review a wide variety of case documents and make decisions as to subsequent action, including preparation of cases for closing. Incumbents interpret, summarize, and draft proposed pleadings regarding a variety of legal documents as well as continuously track case progress for the purpose of maintaining accurate and complete court records. Incumbents make independent decisions to resolve problems, questions, and daily court issues based on their knowledge and experience.

**Factor 4A – Interactions with Judiciary Contacts**

The primary judiciary contacts are trustees and other court staff for the purpose of discussing issues or questions, and verifying, clarifying, and updating the status of cases.

**Factor 4B – Interactions with External Contacts**

The primary external contacts are the public, creditors, attorneys and others to exchange information on case procedures, and verifying, clarifying, and updating the status of cases.

**Factor 5 – Work Environment and Physical Demands**

Work is performed in an office setting. Some lifting may be required. May involve risk from hostile individuals in a controlled office setting.