

POSITION DESCRIPTION

Job Summary

The Bankruptcy Generalist performs various functions and is responsible for maintaining and processing case information and assists in managing the flow and progression of bankruptcy cases and related adversary proceedings, from opening to final disposition, in accordance with approved internal controls, procedures, and rules. Employees at this level may also prepare cases for closing by ensuring that all necessary orders and documents are entered and proceedings are completed accurately. The incumbent receives and reviews incoming court documents and other records for conformity with federal and local rules, performs noticing, provides customer service, and completes administrative and clerical tasks as assigned.

Representative Duties

These representative duties are intended to provide generalized examples of major duties and responsibilities that are performed by incumbents in this position. These representative duties are not intended to include any tasks or duties unique to a particular work location or position, nor are they intended to reflect all duties performed by positions covered by this description.

- Receive, review and screen incoming documents to determine conformity with appropriate rules, practices, and court requirements. Incoming documents include chapter 7 and chapter 13 fee applications, employment applications, final reports, reports of distributions, and Means Testing.
- Check for prior or prohibited filings.
- Route documents to proper offices/persons after acceptance. File documents meeting requirements.
- Prepare case and proceeding files. Ensure assignment of a trustee, if necessary. Review and route case file to appropriate personnel.
- Operate a variety of copying and records equipment. Answer and route incoming phone calls. Prepare case files for tracking. Provide basic information to the public, bar, and the Court. Ensure data quality.
- Process, log, and distribute mail. Retrieve files and make copies of records for the public, attorneys, and others.
- Sort, classify, and file case records. Maintain integrity of the filing and review systems by such means as monitoring and maintaining timely and accurate review and analysis of documents. Create and process new case files. Open cases in case management system.
- Answer customer inquiries regarding status of cases and provide procedural information.
- Docket particular documents in certain proceedings.
- Perform other operational support duties as assigned.

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

Court Operations

- Knowledge of court documents, rules, practices, procedures, and forms including their content, use, and sequence. Knowledge of the Federal Rules of Bankruptcy Procedure and Bankruptcy Code. Knowledge of the rules for document acceptance. Knowledge of the role of Judges, the Clerk' Office, the Bankruptcy Administrator, debtors, and creditors for the purpose of processing of cases. Knowledge of purpose and format of legal documents. Knowledge of where to distribute documents. Knowledge of mailing options and requirements. Knowledge of legal terminology. Skill in mathematics. Knowledge of the roles and responsibilities of court staff. Knowledge of local rules and procedures concerning the processing of cases and public

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access. Knowledge of the purpose and scope of each document or event. Skill in making docket entries. Skill in checking for prohibited filings and unpaid fees on prior filings.

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 to provide information and procedures. Ability to communicate with parties and answer procedural questions without providing legal advice. Ability to interact effectively and appropriately with the public, providing customer service and resolving difficulties while complying with regulations, rules, and procedures. Ability to interact tactfully with a wide variety of people and work well within a team.

Information Technology and Automation

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

Factor 2 – Primary Job Focus and Scope

The primary focus of the job is to process information and documents, case files, and other related documents. Bankruptcy Generalists ensure that court procedures and rules are followed in a timely and accurate manner. Incumbents provide answers to customer inquiries regarding court procedures and case status. Incumbents impact the overall operation of the court and the customers it serves. Incorrectly accepted or processed documents create problems that may affect the ability of the judges to timely and properly rule on cases. Untimely noticing and/or incorrect documents may cause delays in case processing. Incumbents use guidance for managing the flow of and records of the case. These records must be accurate, complete, and current so as not to impair the ability of the court to fulfill its mission.

Factor 3 – Complexity and Decision Making

The work process is well defined but takes some time to learn. Complexity involves tasks related to the comparison or compilation of data, the ability to avoid errors while handling large numbers of documents related to multiple case files, customer service distractions, and work interruptions. Incumbents perform a variety of tasks on a number of cases at the same time. Decisions are based on standard procedures and work policies and are related primarily to whether material being considered meets the standards of acceptance for filing and case administration. Incumbents distribute documents, notify individuals, answer questions, and use discretion with regard to what information is shared with whom. Based on defined procedures, incumbents exercise discretion as to when and in what order tasks are to be accomplished. Complex aspects of the job involve tasks related to the comparison or compilation of data.

Factor 4A – Interactions with Judiciary Contacts

The primary judiciary contacts are chambers staff, operations staff, and staff of other courts for the purpose of verifying, clarifying, reviewing and updating the status of cases and providing general information or answering procedural questions.

Factor 4B – Interactions with External Contacts

The primary external contacts are with the trustees, members of the bar, debtors, creditors and their attorneys, and the public for the purpose of providing general information or answering procedural questions.

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Factor 5 – Work Environment and Physical Demands

Work is performed in an office setting and may occur at off-site meeting locations or temporary duty stations. Some lifting may be required.

*Occupational Group:

Operational Court Support Positions = **O**

Administrative Court Support Positions = **A**

Professional Administrative Positions = **PA**

Professional Line Positions = **PL**