

Joyce Bradley Babin, Chapter 13 Standing Trustee

Job Description

JOB TITLE: Case Manager
Updated: February 2026
Department: Operations
Reports To: Case Operations Administrator
Status: Non-Exempt

JOB SUMMARY: Review and process bankruptcy plans, petitions, schedules, statements, and related documents; verify plan feasibility through use of Plan Calc III; prepare and file with the court orders to pay trustee; review and approve initial attorney fee applications; input and analyze means test information; review, process and document in the case forum orders received from the court; review cases with post-petition adequate protection payments to ensure funds disburse accurately; review receipts in excess of plan payments; research funds received from creditors due to overpayments; coordinate the disbursement of insurance proceeds; and provide assistance to debtors, creditors and attorneys regarding chapter 13 cases.

REQUIRED EXPERIENCE / SKILLS:

This position requires experience in case administration and knowledge and understanding of the timeline and procedures of a chapter 13 case and of related federal and local bankruptcy statutes, rules, policies and procedures; competency in the use of BSS database, Microsoft Word and EXCEL; knowledge and adherence to standard office procedures; the ability to speak clearly and persuasively in positive and negative situations, to respond well to questions, to actively participate in meetings, and to maintain effective working relationship; the ability to write clearly and informatively and to edit work for spelling and grammar; the ability to read and interpret written information; and the ability to perform accurate mathematical calculations.

ESSENTIAL DUTIES:

Case Set-Up

1. For approximately 40% of newly filed cases, process bankruptcy petitions, plans, schedules, statements of financial affairs, attorney fee applications, and credit counseling certificates:

- Verify accuracy of debtor information (debtor's name, address and last four digits of social security number) uploaded from the court;
 - Review debtor's eligibility for discharge based on prior case filings; if suspect the debtor is not eligible for discharge, prepare stipulation of not eligible for discharge and include in forum and note on case analyst worksheet for attorney conducting meeting to review and obtain debtor's attorney's signature at 341(a) meeting;
 - Input case information (date petition filed, plan length, debtor's attorney, case base, exemption calculations, etc.) into the BSS database;
 - Prepare, file with the court, and mail the order to pay trustee;
 - Verify receipt and timeliness of debtor's credit counseling certificate;
 - Input plan and claim information (creditor, scheduled claim amount, etc), assign classification (secured, priority, unsecured) and appropriate claim payment level;
 - Input debtor step payments, if proposed in plan;
 - Input adequate protection payments, if proposed in plan;
 - Verify case feasibility utilizing Plan Calc III in BSS database;
 - Determine if debtor has a domestic support obligation and issue DSO letters, if applicable;
 - Complete case analyst worksheet;
 - Provide, in writing, for review by the attorney conducting the 341(a) meeting potential case issues or irregularities.
2. For approximately 40% of newly filed cases, review initial attorney fee application submitted by debtor's attorney:
- Compare application to services rendered through review of related documents and court filings;
 - Compare application to court approved guidelines for reasonableness;
 - Verify application not previously filed;
 - Submit order to court for approved fees and costs;
 - Include in 341(a) meeting packet requests for business case fees for trustee or staff attorney review and subsequent approval;
 - Note on 341(a) worksheet if attorney fee application has not been filed.
3. For approximately 40% of newly filed cases, input means test information; complete means test for cases determined to be above median income debtors comparing means test financial information to financial information disclosed in debtor's schedules; document

discrepancies for review by the attorney conducting the 341(a) meeting.

Case Management – Cases Ending in 0-3

4. Review, process and document in case forum, provisions of various orders received from the court; refer orders to trustee, staff attorneys or other staff as necessary.
5. Review adequate protection payment report listing confirmed cases with post-petition adequate protection payments; verify funds will disburse appropriately to creditors with adequate protection payments making claim adjustments as necessary.
6. Request return of funds from creditor(s) if determined to have been disbursement in error and monitor to ensure timely receipt.
7. Review claims for which disbursements are approaching the claim limit following up with creditors, as needed.
8. Review receipts in excess of plan payments (tax refunds, settlement proceeds, etc.) to determine proper treatment; adjust plan base as appropriate.
9. Research, through review of case information and/or contact with parties outside the trust operation funds received from creditors due to overpayments; adjust claim in BSS database if appropriate notifying financial administrator of proper disposition
10. Review orders received from court granting a refund requested by debtor; prepare check request and obtain trustee's approval.
11. Monitor orders approving sale of property and various other orders requiring debtor submit documentation and/or proceeds; verifying receipt of documentation or proceeds; notify staff attorney or trustee if not received.
12. Coordinate the distribution of insurance proceeds resulting from an insurance claim on a destroyed automobile or other asset with the debtor's insurance carrier; obtain a status letter from the creditor after receipt of proceeds and adjust claim as necessary.

Other Duties

13. Assemble contents of initial mailing to debtors maintaining an adequate supply of documents included in mailing.
14. Serve as backup in the mailroom by processing incoming mail; deposit payments as needed; printing disbursement checks and other trustee checks and process outgoing mail as needed.
15. Answer incoming phone calls and respond to emails received; provide information and/or resolve issues with debtors, creditors and attorneys; document in forum; notify trustee, staff attorney or administrator of unusual inquiries, concerns or comments.
16. Abide by trust operation's policies as detailed in the employee handbook including reporting to work on a daily and punctual basis, subject to leave policies.
17. Perform other duties and assignments as directed by the trustee, office administrator, staff attorneys, or supervisor to ensure efficient administration of chapter 13 cases.

PHYSICAL

REQUIREMENTS: The essential duties of this position require the ability to sit for an extended period of time; stand for up to four hours during the processing of monthly disbursement checks; use fingers and hands during use of computer keyboard and calculator; adjust visual focus between multiple computer screens at a close distance and between computer screens and paper documents; talk and hear during internal and external telephone conversations; and occasionally lift and / or move light objects (up to 10 pounds) and perform similar actions during the course of a workday.