Joyce Bradley Babin, Chapter 13 Standing Trustee

Job Description

JOB TITLE: Case Analyst / Unsecured Claims Processor

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 and process unsecured claims filed by creditors in chapter 13 cases including review of documentation supporting claims.

REQUIRED EXPERIENCE/ SKILLS: This position requires an understanding of case administration and knowledge and understanding of the timeline and procedures of a chapter 13 case; 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 relationships; 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. The job is technical in nature and requires close attention to detail as accuracy is of the utmost importance.

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 file;
    - 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.

Claims Processing

4. Process unsecured and student loan claims:
    - Identify appropriate scheduled claim by comparing creditor data (name, address, debtor account number, claim amount, etc.) on filed claim with data initially entered in BSS database from schedules filed by the debtor;
    - Verify filed claim includes supporting documentation substantiating claim amount and claim against debtor, request and monitor receipt of documentation if not originally filed with the claim;
    - Enter claim information into BSS database including claim amount, date claim filed, court claim number, claim entry date, etc. and any pertinent information in comment field;
    - Review filed claim to determine classification (i.e., secured, unsecured, priority) and payment level is consistent with treatment proposed in schedules filed by debtor;
    - Compare noticing, remittance address, and creditor attorney noticing address in BSS database to claim selecting alternative name / address as necessary;
    - Forward copy of claim to case analyst coordinator requesting creditor be added to BSS database if not previously included;
    - Consult supervisor regarding unusual claims or an irregularity in creditor information;
    - Monitor claims filed on incomplete cases and enter into BSS database when required schedules are filed;
    - Review for stale dated claims and notify paralegal as appropriate.

5. Identify amended claims, enter in revised claim information (amount, account number, etc), generate a summary notice of amended claim; forward copy of amended claim to final case auditor for audit.

6. 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.

7. 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.

8. 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.

9. 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; 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 other similar actions during the course of the workday.