

**UNITED STATES BANKRUPTCY COURT
SOUTHERN DISTRICT OF CALIFORNIA**

Job Title:	Intake/Customer Services Clerk/Public Services Clerk 1	CL- 24
Occupational Group:	Operational Court Support	

Job Summary
<p>Intake/Customer Services Clerks perform various functions in accordance with approved internal controls, procedures, and rules. They serve as records and reproduction clerks and/or case initiation clerks. They receive and review incoming court documents for conformity with federal and local rules, and perform customer service and cashier duties for the purpose of providing procedural information and collecting court fees.</p> <p>Intake/Customer Services Clerks are on the Public Services team, and located in the clerk’s office.</p>

Representative Duties
<ul style="list-style-type: none"> • Open cases in case management system. Docket initial opening events. Certify court documents and ensure data quality of newly opened cases. • Receive and review incoming court documents for conformity with federal and local rules, and perform customer service and cashier duties for the purpose of providing procedural information and collecting court fees. Check for prior or prohibited filing. Verify and issue summons. Process, scan and distribute all documents presented at the court for filing. Sort and process mail. • Inform customers of required fees. Receive payments and issue receipts. Secure funds in cash register. Balance cash drawer at the end of the day. Process credit card payments for filed documents. • Operate a variety of copying and records equipment. Answer and route incoming calls. Assist the public in use of computerized databases. Provide basic information to public, bar, and the court. • Prepare, ship and retrieve records from the appropriate Federal Records Center. Receive and stamp incoming documents. Maintain archive information regarding closed files and archived documents.

Factor 1 – Required Competencies (Knowledge, Skills, and Abilities)
<p>Court Operations</p> <ul style="list-style-type: none"> • Knowledge of local court rules, practices, procedures, and forms. Knowledge of purpose and format of legal documents. Knowledge of where to distribute documents. Knowledge of how to process, issue, and certify documents. Knowledge of procedures for public access to court files. Knowledge of mailing options and requirements. Knowledge of legal terminology. Knowledge of Federal Record Center Policy. Knowledge of basic documents (i.e. pleadings, correspondence, transcripts, etc.). Skill in making docket entries. Skill in checking for prohibited filings and unpaid fees on prior filings. Skill in mathematics. <p>Judgment and Ethics</p> <ul style="list-style-type: none"> • 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.

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 a cash register. 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, and other related documents. Intake/Customer Services Clerks ensure that court procedures and rules are followed in a timely and accurate manner. In addition, Public Service Clerks 1 at this level provide answers to customer inquiries regarding court procedure and case status. Accurate records are crucial to the integrity of the court and a basic function that is expected from the court. This position is also the “face” of the Court to much of the public and therefore can influence the public image of the local institution. Errors in this position can have the effect of inconsistent enforcement of the rules governing the record, or worse, inaccurate records which has consequences on the reputation and integrity of the court. If errors result in lost records due to incorrect closure or other error, it could have grave consequences on the court and the affected parties.

Factor 3 – Complexity and Decision Making

Intake/Customer Services Clerks at this level maintain filing systems, initiate cases, and retrieve and review incoming court documents. Work processes are well defined but take some time to learn. The most complex aspects of the job at this level involve tasks related to the comparison or compilation of data or being able to avoid errors while handling large numbers of items during customer service distractions and interruptions. Decisions are based on well-defined standard procedures and work policies and are related primarily to whether material being considered meets the standards of acceptance for filing. Employees also distribute documents, answer questions, and use discretion with regard to what information is shared with whom.

Factor 4A – Interactions with Judiciary Contacts

The primary judiciary contacts are chambers staff, operations staff, and staff of other courts for the purpose of providing and receiving files and case information.

Factor 4B – Interactions with External Contacts

The primary external contacts are the public, parties, attorneys, and other government agencies for the purpose of exchanging information, providing information, and advising on proper procedures.

Factor 5 – Work Environment and Physical Demands

Work is performed in an office setting. Some lifting may be required.