

CASE MANAGEMENT ASSISTANT

A. DEFINITION

The Case Management Assistant compiles, analyzes and maintains case statistics for a defender organization.

B. PRIMARY JOB DUTIES

The Case Management Assistant performs tasks such as the following:

1. Opens and closes case files. Analyzes processes for opening, closing, and maintaining case files and makes recommendations for improvement.
2. Provides organization with casefile updates for TimeKeeper and Case Management System (CMS) programs. Maintains case indexes and cross-reference systems.
3. Inputs data such as minute entries and orders, client information, and other locally maintained statistical information into database.
4. Prepares regular statistical reports.
5. Prepares weekly, monthly, quarterly and annual reports for the Defender on staff attorney case loads.
6. As directed, prepares monthly, quarterly and annual statistical reports for the Defender and the Administrative Office of the United States Courts with respect to the number and types of cases opened, closed and pending, as well as the disposition of closed cases.
7. Analyzes statistical data regarding attorney case loads, the types of cases opened and closed and case dispositions. Prepares statistical reports and projections on these subjects for the Defender.
8. Maintains archived closed files, both on and off site; archives files to off site storage as needed or directed.
9. Assists in the development of budget requests and case load projections as required.
10. Assists staff and other Federal agencies in obtaining and interpreting information in CMS.
11. Performs all other duties as assigned.

C. ORGANIZATIONAL RELATIONSHIPS

The Case Management Assistant reports to the Administrative Officer or other supervisor as designated by the Defender.

D. QUALIFICATIONS

To qualify for the position of Case Management Assistant, a person must be a high school graduate or the equivalent and must have the requisite experience outlined in the *Salary and Experience Scale* and *Experience Requirements* sections. The individual must be able to perform each essential job duty satisfactorily. The job requirements are representative of knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

E. SALARY AND EXPERIENCE SCALE

DOCS Grade Level	Years of General Experience	Years of Specialized Experience	Total Years of Experience
5	2	0	2
6	2	1	3
7	2	2	4
8	2	3	5
9	2	4	6

Note: One year of the required experience must have been at, or equivalent to, the next lower grade in federal service. Experience that has not provided training or required the application of the knowledge, skills and abilities outlined in the *Primary Job Duties* section above is **not** creditable experience. Specialized experience may always substitute for general experience but general experience may not substitute for specialized experience.

F. EXPERIENCE REQUIREMENTS

General Experience

Experience that provides evidence the candidate has:

- a general understanding of the methods and skills required for accomplishing the tasks outlined in the *Primary Job Duties* section above;
- a general understanding of office confidentiality issues, such as attorney/client privilege;
- the ability to analyze and apply relevant policies and procedures to office operations;
- the ability to exercise good judgment in a mature and diplomatic manner;
- the ability to communicate orally and in writing;
- a general knowledge of office practices and secretarial processes;
- the ability to recognize and analyze problems and recommend practical solutions;
- the ability to use a personal computer.

Specialized Experience

Progressively responsible experience in the functional areas described in the *Primary Job Duties* section above. Such experience provides the individual:

- a comprehensive knowledge of office clerical principles, practices, methods and techniques;
- the ability to identify and evaluate pertinent facts and regulations, policies and precedents;
- skill and judgment in the analysis of assignments;
- an understanding of administrative and secretarial duties in a legal environment;
- experience as a secretary or Secretary performing progressively responsible duties;
- experience in a legal environment that would provide knowledge of legal terminology, formats, and procedures;
- the skills and ability to execute the duties of the position.

G. EDUCATIONAL SUBSTITUTIONS

Education above the high school level in accredited institutions may be substituted for the general experience on the basis of one academic year (30 semester or 45 quarter hours) equals nine months of experience.

Completion of all the requirements for a bachelor's degree from an accredited college or university and having met one of the following may be substituted for one year of specialized experience:

1. An overall "B" grade point average equaling 2.9 or better of a possible 4.0.
2. Standing in the upper third of the class.
3. A "B+" (3.5) grade point average or better in major fields of study such as business or public administration, criminal justice, political science, law, management or specialized or significant course work in a field closely related to the subject matter of this position.
4. Election to membership in Phi Beta Kappa, Sigma XI, or one of the National Honor Scholastic Societies meeting the minimum requirements of the Association of College Honor Societies, other than Freshman Honor Societies.

Completion of one academic year (18 semester hours) of graduate study in an accredited university in such fields as business or public administration, criminal justice, political science, law, management or other field closely related to the subject matter of the position, may be substituted for one year of specialized experience.

Completion of a master's degree or two years of graduate study (36 semester hours) in an accredited university in such fields as business or public administration, criminal justice, political science, law, management or other field closely related to the subject matter of the position, or completion of a