



Social Security Administration SSA-801 - Position Description

| | | | | | | | | | | | |
|---|--|---|----------------------------|-------------|--------------------------|---|-----------------------|---------------|---------|------------------|-----------|
| 1. Position Description #: | | 67266 | | | | | | | | | |
| 2. Official Title: | | Case Assistant (OA) *Legal Assistant (OA) | | | | | | | | | |
| 3. Pay Plan/Series/Grade: | | GS-986-06 | | | | | | | | | |
| 4. Organizational Title: | | Case Technician | | | | | | | | | |
| 5. Classified/Graded By: | | Tina Williams | | | | Date: | | 10-29-99 | | | |
| 6. Organizational Location: | | SSA, Office of the Deputy Commissioner for Disability and Income Security Programs, Office of Hearings and Appeals Office of Disability Adjudication and Review (per COSS 4-3-06), Regional Office, Hearing Office | | | | | | | | | |
| 7. Number of Allocations: | | V-1500 *(See #25 Remarks) | | | | | | | | | |
| 8. Reason for Submission: | | New | | X | | Redescription | | Reestablished | | Other | |
| 9. Service: | | Headquarters | | X | | Field | | | | | |
| 10. Employing Office: | | Various | | | | 11. Duty Station: | | Various | | | |
| 12. Fair Labor Standards Act: | | Exempt | | X | | Non-Exempt | | | | | |
| 13. Financial Statement Required: | | Executive Personnel Financial Disclosure | | | | Employment and Financial Interests | | | | | |
| 14. Position Status: | | X | | Competitive | | Excepted (Specify in Remarks) | | SES (Gen) | | SES (CR) | |
| 16 Supervisory/Leader Status: | | Supervisory | | X | | Non-Supervisory | | Team Leader | | Work Leader | |
| 17. Sensitivity: | | X | Non Sensitive/ Low Risk | | NonCritical Sensitive | | Critical Sensitive | | Special | Moderate Risk | High Risk |
| | | | 1C AIS | | 2C AIS | | 3C AIS | | 4C AIS | 5C AIS | 6C AIS |
| 19. Supervisor Certification. I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that the false or misleading statements may constitute violations of such statutes or their implementing regulations. REQUIRED | | | | | | Typed Name/Title of Immediate Supervisor: Signature of Immediate Supervisor and Date: | | | | | |
| 20. Higher Level Management Concurrence (Optional) | | | | | | Typed Name/Title of Higher Level Manager: Rita Geier, Associate Commissioner Signature of Higher Level Manager and Date: /s/ 10-17-99 | | | | | |
| 21 Allocation Certification I certify that each incumbent will perform the grade controlling duties and responsibilities of this position for a substantial amount of time (i.e., 25% or more). REQUIRED for Non-Supervisory GS-14 & Below | | | | | | Typed Name/Title of Delegated Authorizing Official for Non-Supervisory GS-14 and Below: Signature of Delegated Authorizing Official and Date | | | | | |
| 22. Classification/Job Grading Certification. I certify that this position has been classified/graded as required by Title 5, U. S. Code, in conformance with standards published by the Office of Personnel Management or, if no published standards apply directly, consistently with the most applicable published standards and authorize establishment of the position.. | | | | | | | | | | | |
| Typed Name/Title of Official Taking Action: Tina Williams, Personnel Management Specialist | | | | | | Signature of Official Taking Action and Date: /s/ 10-27-99 | | | | | |
| 23. Typed Name/Title of Delegated Official for GS-15/ SES: | | | | | | Signature of Delegated Authorizing Official for GS-15/SES and Date: | | | | | |
| 24. Standards and information on application are available in the personnel office. Position Classification Standards used in Classifying Position and date issued: Legal Clerical and Assistance Series, dtd. January 1992; Grade Level Guide for Clerical and Assistance Work, dtd. June 1989 | | | | | | | | | | | |
| 25. Remarks: *Applied new JFS for Assistance Work in the Legal and Kindred Group, GS-0900 issued by OPM 8/01. Title change resulted. TWilliams 7/2/02 Organizational Approval: Lew H. Kaiser /s/ 10-27-99 | | | | | | *Allocations include use of GS-986-5/4-#67266W/X. | | | | | |
| 26. Description of Major Duties and Responsibilities (See Attached) | | | | | | | | | | | |

Legal Assistant (OA)
GS-986-06-#67266

INTRODUCTION

This position is located in the hearing offices of the Office of Hearings and Appeals (OHA), Social Security Administration (SSA). The incumbent provides a full range of clerical and technical support for Administrative Law Judges (ALJs) and other technical/professional positions in the hearing office in processing cases filed under Titles II, XVI and XVIII of the Social Security Act. Typically, the incumbent:

MAJOR DUTIES

- Reviews and analyzes a wide variety of medical and legal documentation, records and evidence to ensure that OHA case files are received and developed in accordance with legal and regulatory authorities. Performs a wide range of actions in support of pre- and post-hearing case development, including composing correspondence to request medical reports from physicians, hospitals, claimants' representatives, etc., and to prepare responses to written inquiries on cases. Requests consultative examinations and medical records through the Disability Determination Services (DDS), and maintains a follow-up system to ensure receipt of such records.
- Ensures that aged cases, terminally ill (TERI) cases and dire need cases are given priority and all steps of the process are handled in an expeditious manner.
- Schedules cases for hearing in accordance with legal and regulatory requirements and coordinates time and date of hearing with claimants, representatives, expert witnesses, and hearing reporters. This includes arranging for space, scheduling all participants, making necessary travel arrangements when the hearing is held at a remote site, preparing itineraries, and preparing travel vouchers. Prepares Notices of Hearing, and contractor invoices for payment of vocational experts and medical experts.
- Upon receipt of additional evidence received after the hearing, reopens the record to admit the exhibits or closes the record if no additional evidence is received.
- Examines fee agreements received from representatives for proper criteria before presentation to the ALJ for signature. Uses information at Section I-5-109 of HALLEX to ensure correct processing. Ensures that the agreement meets all conditions for approval relating to fee setting, authenticity of attorney on the case, and legal guardian status.
- Maintains, reviews, updates and utilizes a variety of data systems (NS Elite, HOTS, etc.) to ensure timely scheduling of hearings, proper case flow, equitable distribution of workload and proper payment of services, travel, supplies and equipment.
- Responds to a wide range of inquiries from public, legal and judicial officials, and Federal state and local officials relating to the legal processing of the hearings and appeals program. Provides information regarding the basic legal process and documentary evidence required of the claimants, legal representatives, medical and vocational experts, and other Federal and state personnel. In this connection, Incumbent must use discretion in dispensing information and must at all times use tact and diplomacy in handling personal and telephone contacts. When furnishing information, documents the file accordingly.

- Assists claimants and other visitors by responding to a variety of questions, often providing the claimants with information about their right to be represented, advising them when additional evidence is necessary, and providing other background information as requested.
- As required, monitors hearings. When participating in hearings, incumbent is recognized as the Agency's representative in defining the legal process and decorum to the claimant and legal representative and other participants in the hearing. Sets up hearing room and recording equipment, ensuring that the equipment functions properly throughout the hearing. Prepares non-standard opening statement for the ALJ to use to begin the hearing. Assures that all evidence and testimony presented at the hearing is complete and recorded. Observes and makes notes of relevant hearing room conditions, and records specific and relevant testimony of the claimant and/or witnesses.
- Performs master docket functions. This involves receiving and reviewing incoming material, inputting appropriate information into the computer, requesting claim files, reviewing files to determine timeliness of case filing, transferring cases and giving status by telephone or letter to claimants and their representatives.
- Uses personal computer for word processing functions, data input, queries, reports and case tracking systems. Maintains a library of permanent templates/diskettes of frequently used materials in ALJ decisions; e.g., SSA law and regulations paragraphs, findings of fact, and various generic decisional paragraphs. Uses the templates appropriately when typing documents.
- Prepares draft material (decisions, dismissals, and other correspondence) from tape recordings or handwritten material; and prepares in final format after review. This material involves the use highly specialized medical and legal terminology, necessitating reference to technical dictionaries or manuals. Determine the propriety of form and arrangement requiring selection from a variety of formats. Proofreads typed materials for grammar, spelling, formats, typographical errors, conformance to procedural requirements, and assembles finished product. Also types exhibit lists and fee authorization forms, as requested. A qualified typist is required.
- Prepares letters, memoranda, forms, reports and other materials. Incumbent is responsible for spelling, punctuation, grammar, and arrangement of final copy.
- As requested, may assist the Hearing Office Systems Administrator or management in training support staff in the use of computers, as well as various software applications which are used in decision processing (i.e., Microsoft Word), by demonstrating how the computer and software are used in performing their job. Notifies the appropriate personnel when equipment repairs are required.
- Based on the type of case, prepares cases and decisions for mailing by ensuring copies of the decision are sent to the appropriate parties and effectuating component. When mailing fee agreements, ensures ALJ approval and signature before release. Processes and mails other correspondence as necessary.
- As requested, photocopies portions of claims files to be presented to claimant/representative and medical/vocational expert before hearings are held.
- As requested, performs receptionist duties; e.g., signing in claimants and hearing participants as they arrive for the hearing, answering questions at

receptionist window; answering primary telephone line and responding to questions from the public; referring other calls to staff.

-- Performs other duties as assigned.

Factor 1 - Knowledge Required by the Position

Knowledge of legal and judicial procedures relating to the processing and hearing of appeals for entitlement of benefits under Titles II, XVI, and XVIII of the Social Security Act, as amended.

Knowledge of legal, medical and technical terminology commonly encountered during the processing of cases under the Social Security Act, as amended.

Working knowledge and understanding of SSA benefit programs under Titles II, XVI and XVIII of the Social Security Act, as amended.

Working knowledge of the intricacies of style and form requirements for preparation of legal documents.

Familiarity with, and knowledge of OHA programs, policies and procedures.

Skill in effectively communicating OHA policy and procedural matters to a wide range of individuals, including claimants, attorneys, physicians, medical and vocational experts, Congressional office staff, etc.

Skill in operating personal computer and attendant software to produce work accurately and efficiently. Also, skill in operating related equipment, such as printers and modems, hearing room equipment, transcription equipment and electronic typewriter. A qualified typist is required.

Knowledge of specialized medical and legal terminology and formats to type dispositions in final form from tape recordings. Training is required on the nature and structure of medical root words, suffixes and prefixes. Use of medical dictionary and other specialized texts, e.g., Physician's Desk Reference, Merck Manual, are referenced to ensure the accuracy of the terms involved.

Knowledge of grammar, spelling, capitalization, punctuation and terminology commonly used in office settings to prepare material correctly from handwritten drafts or voice recordings; and knowledge of standard processing procedures, formats, and distribution and retention policies for the correspondence or reports produced.

Knowledge of OHA case control system sufficient to access and update the system through timely and accurate encoding information.

Knowledge of office automation software and processing procedures in order to produce letters, memoranda and reports, and store and retrieve data. Skill in working with computer templates when preparing decisions is required.

Factor 2 - Supervisory Controls

The incumbent's supervisor and/or work leader makes assignments by defining objectives, priorities and deadlines. The incumbent plans and carries out work independently in accordance with prescribed procedures. The work is evaluated by the supervisor for appropriateness and effectiveness.

Factor 3 - Guidelines

Guidelines include, but are not limited to, unit instructions, administrative and procedural manuals, medical references, agency directives, the OHA HALLEX, and personal computer software tutorials and user's manuals.

The incumbent chooses the most appropriate guideline and decides how the various transactions are to be completed. Guidelines often do not apply directly, requiring incumbent to make adaptations to cover new and unusual work situations.

Factor 4 - Complexity

The work consists of duties which involve a wide variety of processes and activities depending upon the type of case being worked. The incumbent analyzes each case to discern phase or issue involved in order to determine correct course of action. The incumbent selects alternatives as appropriate. The work involves elements which need identification since meticulous attention to detail is required. The incumbent must have the ability to adjust priorities and recognize situations that require considerable judgment and tact. The incumbent is regarded as an expert source of information on regulatory requirements and is frequently called upon to provide accurate information rapidly on short notice.

Factor 5 - Scope and Effect

The purpose of the work is to create, process and maintain various documents for the hearing office. Work comprises part of the case processing and affects the timeliness; accuracy and acceptability of the Agency's work products. Work of the incumbent impacts on the due process rights of the claimant and directly affects the ability of claimants to receive benefits under the Social Security Act.

Factor 6 - Personal Contacts

Contacts are with employees at all levels within and outside OHA, e.g., SSA district/branch offices, OHA/SSA Headquarters, and also claimants, attorneys/lay representatives, Congressional representatives, physicians, vocational experts, medical experts, and representatives from OHA Regional and Headquarters offices.

Factor 7 - Purpose of Contacts

Contacts are for the purpose of explaining procedures or furnishing information. In dealing with claimants and their representatives, tact and discretion are required. Information provided to inquirer must be accurate, and incumbent is expected to determine inquirer's right to information.

Factor 8 -- Physical Demands

The work is primarily performed while sitting. There may be some walking, standing, bending and carrying of items such as files, records and books. Some movement may be needed to obtain records from files in the office, to visit other offices in the building, or to visit other locations.

Factor 9 - Work Environment

Work is performed in an office setting involving everyday risks or discomforts that require normal safety precautions typical of such places as offices, meeting and hearing rooms.