

# *Colorado Fund for People with Disabilities*

## POSITION DESCRIPTION

### **Representative Payee Coordinator**

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#### JOB SUMMARY/ PURPOSE

This position exists to assist beneficiaries in accessing their federal income benefits; making timely payments toward basic needs expenses, i.e., rent/mortgage, grocery and primary medical costs; and to disburse beneficiaries' remaining funds for personal expenditures. It serves people with disabilities and seniors who are receiving services from the Colorado Fund for People with Disabilities (CFPD) and its affiliated programs and/or organizations.

#### ORGANIZATIONAL/ OPERATIONAL ENVIRONMENT

This position is part of The Colorado Fund for People with Disabilities, and its affiliated programs and/or organizations. CFPD is a non-profit organization which operates supplemental needs trusts for persons with disabilities; and provides additional services through a fee-for-service entity which supports CFPD.

#### NATURE OF THE ROLE

This role is integral to the smooth and efficient running of the CFPD office, its financial affairs, the financial affairs of its clients and Beneficiaries, and the organization's compliance with various statutory, financial and legal requirements.

#### REPORTING STRUCTURE AND AUTHORITY

The position reports directly to the Director of Community Relations of CFPD. The position has authority to carry out a range of functions under the direction of the Director of Beneficiary Services, providing the functions are carried out according to the policies and procedures set by the E.D. and Board of Directors.

#### KEY ACTIVITIES

Key activities include those listed below and other activities required by the organization consistent with the employee's skills, abilities and within the current level of responsibility of the employee.

#### *Responsibilities to Beneficiaries*

- Assess the current situation and the supplemental needs of CFPD beneficiaries as assigned. Develop a budget and plan to meet the identified needs.
- Facilitate the purchase of goods and/or services to meet the basic and supplemental needs of the beneficiary as outlined in CFPD policies and procedures, as well as SSA and other Federal Income Program guidelines.
- Maintain contact with beneficiaries, guardians or family as needed to meet the individual needs of the beneficiary.
- Make referrals to other organizations, agencies or service providers, as necessary, for the benefit of the beneficiary.
- Keep accurate records of the time spent working on behalf of the beneficiary per CFPD procedure.
- Maintain accounting records for regularly-scheduled payments and supplemental needs requests for each beneficiary.
- Maintain files for each beneficiary/client.

Specific Duties Include (but are not limited to) the following:

<b><i>Daily Activities</i></b>	<b><i>As-Needed Activities</i></b>	<b><i>Weekly Activities</i></b>	<b><i>Monthly Activities</i></b>	<b><i>Annual Activities</i></b>
Day to Day calls with Clients	Budgeting		Reconciliation	Annual Reporting - SSA
Day to Day calls with Referrers or CMs	Apps to SSA	KS Card Loads	Purchase Walmart Cards	Annual Reporting to Clients
Program Inquiry Calls	Apps to RP Program	Debit Card Loads	Compose Board Reports	
SSA/Medicaid Calls	Order/Cancel Sprint Phones	Rent Days	Bus Pass Ordering	
Process Special/Supplemental Needs Requests	Intake Meetings	Personal Needs Days	Credit Card Reconciliation	
Make Referrals to other agencies/services	Corrective Action Meetings	Bill Days		
Timekeeping	APS Reports	Scanning		
Filing				
Client Interaction & documentation				
Data Entry				

*General Office Duties/other responsibilities*

- Provide information, as necessary, to meet internal and external reporting requirements.
- Attend Board and Committee Meetings as needed.
- Housekeeping duties as assigned.
- Other duties as assigned by the Director of Community Relations or the Executive Director.

*Special Projects—Assist responsible staff member as needed*

- Trainings or other events
- Annual Accountings
- Mass Mailings

**SKILLS REQUIRED**

*Task and Role Management*

- Management of day to day, week to week activities consistent with job roles and organizational goals and objectives.
- Ability to independently prioritize multiple tasks and deadlines.

*Management and use of technology*

- Use and maintain various forms of office technology; with skills in Microsoft Office Suite and ability to learn proprietary or CFPD-specific software.
- Willingness and ability to account for time spent on tasks using BillQuick or equivalent billing software.

*Office Support*

- The role requires skills and experience to perform general office duties to ensure the smooth operation of the office, regulatory compliance and improvement of procedures where appropriate.

#### *People Skills*

- This role requires the ability to work well with many different stakeholders; who will include other employees, Beneficiaries of Rep Payee Services, members of the Board of Directors, vendors and service providers, benefit eligibility technicians, attorneys and others.
- The role also requires the ability to interact with people who have disabilities, and their families, with sensitivity and tact.

#### *Education or Job Experience*

- High school graduation or GED completion
- Three-five years' experience working in a professional environment.

#### OTHER REQUIREMENTS

- Heavy phone contact requires ability to speak clearly and hear well on the telephone.