

Colorado Fund for People with Disabilities

POSITION DESCRIPTION

Representative Payee Coordinator

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:

<i>Daily Activities</i>	<i>As-Needed Activities</i>	<i>Weekly Activities</i>	<i>Monthly Activities</i>	<i>Annual Activities</i>
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

- [REDACTED] *
- 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.

* Five years' previous experience in working with adults with mental illness and/or related bachelor's degree and 1+ years' experience are required.

The following descriptions were pulled from CFPD's contracts, describing the additional functions of the MH Case Manager/Rep Payee (vs. our traditional Rep Payee position.) Please read both the RP job description and these additional services to get the full scope of this job.

Service Provision: Using our current Rep Payee program's best practices as a foundation, we'll customize program elements based on the express needs of this group and their Transition Team. Please see the attached Rep Payee Coordinator Job Description for more detail. Routine services include:

- Performing an initial intake with the client and his/her representatives by phone, in person or Skype
 - o Learn about the client's present and past financial concerns; his/her experiences with money handling; goals for saving and spending; who to include or exclude from communications about the client (support network)
 - o Develop a budget with the client based on known income and expenses
 - o Identify areas where client could be saving money by changing services; help identify services the client currently lacks and make referrals
 - o Review policies and procedures; gain agreement from client and RP
 - o Provide instructions on how to have all bills transferred to our mailing address and give us authorization to discuss accounts
 - o Present program options offered by CFPD for no-contract cell phone plans; using reloadable grocery cards; using Walmart or other gift cards to manage spending
 - o (Beginning mid-2015) Determine whether the client could benefit from using a debit card vs. handling paper checks
- Paying all regularly-scheduled bills that have been provided to the RP in a timely and accurate fashion including rent, food, utilities, medical costs and other ongoing expenses
- Handling new or emergent requests for special or one-time payments
- Communicating with Social Security to address any changes in income or benefits
- Alerting Social Security of any changes as required (e.g., a change in residence, admission to hospital, incarceration, etc.)
- Monitoring account balance to assure compliance with income and resource limits
- Sending annual accountings to client and to SSA; providing accountings as-needed for entry into new programs, eligibility redetermination, etc.
- Documenting interactions with clients and their myriad service providers
- Making reports to Adult Protective Services (APS) and other monitoring agencies if it seems the client is at risk of financial abuse (or any type of abuse we're made aware of); advising clients of their rights and referring to legal assistance when needed
- Advocating for clients whose income or bills are incorrect
- Negotiating payment plans with creditors/collection agencies
- Alerting appropriate people/authorities when clients' capacity to make financial decisions is in serious question; providing referrals regarding powers of attorney or court-ordered decision-making

Specialized Services for CCTS clients would add:

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- Becoming the Authorized Rep for SSA benefits Connecting people eligible for benefits but not yet receiving them to agencies practicing the SOAR model of SSA application completion.
- Working one-on-one with clients to change billing address, authorization info (vs. having them do this on their own)
- Setting up regular communication with Transition Specialists to learn about clients' evolving needs during intensive services
- Setting up regular "meeting" time with CCTS-referred clients to address concerns, answer questions, make changes to budget/spending as needed (by phone or, preferably, via Skype)
- Directly assisting clients in completing eligibility documentation for income-based programs; communicating with those programs as needed
- Providing written reports to Transition Specialists as needed to document the clients' performance in the program; assisting individuals to move to greater or lesser levels of financial oversight, as appropriate
- Potentially accepting referrals to our Conservatorship program when it is determined that the client is not able to manage funds within their own benefit, and meets a legal standard for court-ordered financial decision-making
- Charging no fee directly to the client; program funding will cover this cost