

# Lutheran Social Services Position Description



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**Division/Department:** Money Minders Department

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**Job Title:** Client Financial Coordinator

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**Reports to (Title):** Director of Representative Payee Services

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**Job Code:**

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**FLSA Status:** Exempt

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<b>Manager (with direct reports)?</b>	Yes	No X
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**Location:** Jacksonville

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## SUMMARY

This position manages client Social Security (SSI/SSDI), Veterans Administration, and Railroad Retirement funds through the Representative Payee Program and coordinates with Case Managers, Assisted Living Facilities/Adult Family Care Home (ALF/AFCH) Operators (when applicable), landlords, apartment managers and clients.

## ESSENTIAL DUTIES & RESPONSIBILITIES

- Assist clients with SSI/SSDI application process for the Representative Payee Program if needed. Transfer application to SSI/SSDI for final approval
- Monitor information affecting client's eligibility for SSI/SSDI (and other funds) and communicate pertinent changes in client status
- Serve as a liaison with the Social Security office and process waivers when necessary
- Complete SSA Representative Payee reports and disability update reports
- Advocate on behalf of the client in financial matters
- Maintain accurate client files and accounts, and document all services provided
- Meet with clients and assist them in determining their monthly financial needs
- Assess financial needs and assist the client in preparing a monthly budget, within the constraints of the benefits received
- Process monthly disbursements to meet client obligations within budgetary constraints
- Report activity to the ALF residents and community clients on a monthly basis, or as needed
- Maintain current and accurate site visit lists and client files
- Communicate with ALF and AFCH sites monthly and boarding homes quarterly to assure client is maintaining residence
- Conduct monthly client assessments and refer any special services needed to other appropriate agencies

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## WORK EXPERIENCE & JOB RELATED SKILLS (Required/Preferred)

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### **Required:**

- Strong written/oral communication skills
- Working knowledge of basic personal legal documents, (e.g., Power of Attorney, etc.)
- Experience in dealing with diverse population
- Ability to exhibit compassion and patience; must also possess good telephone etiquette
- Computer skills - Microsoft Office, Word, Excel, Outlook.
- Language Skills - Ability to read and interpret documents such as procedure and policy manuals and correspondence from Social Security Office. Ability to write routine reports and correspondence. Ability to speak appropriately to client population.
- Mathematical Skills - Ability to add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions and decimals. Ability to compute rate, discount, and percent. Ability to calculate and balance a budget for each client.
- Reasoning Ability - Ability to apply common sense understanding to carry out instructions furnished in written or oral form. Ability to deal with problems involving several concrete variables in standardized situations.
- Must possess valid Florida driver's license and own transportation to travel to various locations in North Florida area.

### **Preferred:**

- Experience with personal finance, SS/SSDI and other benefits
- Experience working with mentally ill population

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## EDUCATION, CERTIFICATION, LICENSURE (Required/Preferred)

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### **Required:**

- Associate Degree; or High School Diploma (or General Education Degree) with 3 years of related work experience

### **Preferred:**

- Bachelor's Degree

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## REQUIRED JOB COMPETENCIES (*Behaviors For Effective Job Performance*)

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- Attendance
- Adaptability/Flexibility
- Coordination/Collaboration
- Dealing With Ambiguity
- Teamwork
- Timely Decision-Making

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<b>WORK ENVIRONMENT/PHYSICAL DEMANDS</b>	
Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.	
Activity: (if more than 2+ hours per day)	<input checked="" type="checkbox"/> standing <input checked="" type="checkbox"/> sitting <input checked="" type="checkbox"/> mobility <input type="checkbox"/> climbing <input type="checkbox"/> balancing <input checked="" type="checkbox"/> writing <input type="checkbox"/> crawling <input type="checkbox"/> squatting <input type="checkbox"/> bending <input checked="" type="checkbox"/> filing <input type="checkbox"/> twisting
Lifting to include:	<input type="checkbox"/> up to 10lbs. <input checked="" type="checkbox"/> 11-25 lbs. <input type="checkbox"/> 26-60 lbs. <input type="checkbox"/> 61-75 lbs. <input type="checkbox"/> over 75 lbs. <input type="checkbox"/> pushing <input type="checkbox"/> pulling <input checked="" type="checkbox"/> carrying
Environmental Conditions:	<input type="checkbox"/> cold <input type="checkbox"/> heat <input type="checkbox"/> wet and/or humid <input type="checkbox"/> noisy <input type="checkbox"/> vibration <input type="checkbox"/> fumes <input type="checkbox"/> dust <input checked="" type="checkbox"/> odors <input type="checkbox"/> mists
Sensory:	<input checked="" type="checkbox"/> hearing to converse <input checked="" type="checkbox"/> hearing to use telephone <input checked="" type="checkbox"/> talking <input checked="" type="checkbox"/> smelling <input checked="" type="checkbox"/> reading distance 1-5ft. <input type="checkbox"/> reading distance 10-30ft.
Driving:	<input type="checkbox"/> incidental driver <input checked="" type="checkbox"/> regular driver
Keying:	<input type="checkbox"/> Occasionally (2-3 hours weekly) <input checked="" type="checkbox"/> Frequently (2-3 hours daily) <input type="checkbox"/> Continuously (4+ hours day)
Safety:	lists specifics Working with mentally ill population – care must be taken not to unduly provoke clients

The statements included in this Job Description are intended to describe the general nature and level of the work being performed by the person assigned this job. They are not intended to be an exhaustive list of all responsibilities, duties and skills required.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Lutheran Social Services is an Equal Opportunity Employer**

**Please email resume to [jobs@lssjax.org](mailto:jobs@lssjax.org).**