



Division/Department: Representative Payee

Job Title: Rep Payee Fiscal Case Manager

Reports to (Title): Rep Payee Fiscal Case Manager Supervisor

Job Code:

FLSA Status: Non-Exempt

Manager (with direct reports)?

Yes

No X

Location: Jacksonville

SUMMARY

This position manages client Social Security (SSI/SSDI), Veterans Administration, and Railroad Retirement funds through the Representative Payee Program and provides support case management services and coordination to enrolled clients- with the ultimate goal of promoting and supporting independence and self-sufficiency. Case management services may include: patient intake, assessment of needs, service planning, service plan implementation, service coordination, monitoring and follow-up, reassessment, treatment adherence, case conferencing, crisis intervention, and case closure.

The Rep Payee Fiscal Case Manager also coordinates with external Partners, Case Managers, Assisted Living Facilities/Adult Family Care Home (ALF/AFCH) Operators (when applicable), landlords, apartment managers and clients. Works collaboratively with network and community agencies to ensure comprehensive care for clients.

ESSENTIAL DUTIES & RESPONSIBILITIES

Fiscal Management and 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.

Case Management Responsibilities – High Acuity and Eligible Clients

- Will communicate with each client monthly.
- Conducts comprehensive needs assessment of clients to determine the client’s current health states and risk factors.
- Develop therapeutic relationships with clients, maintain ongoing connection with clients and families during times they are not accessing services.
- Conducts home visits as needed to ensure timely access to and coordination of medical and psychosocial services.
- Assess client stability and provide referrals to increase level of stability and self- sufficiency.

- Ensure that the client is an active stakeholder in his/her own care to develop an ISP that will establish objectives and desired outcomes as well as identify the action items needed to achieve them.
- Action items may include referrals and referral follow-ups, doctors' appointments, home visits and application for all entitled benefits.
- Develop an ISP that will provide structure for the client's care and monitor progress toward the stated goals.
 - ISP will be re-evaluated once every six months and is written to be a "living document" that can be revised at any point to ensure it continues to address the clients' unique evolving needs.
 - Identifies and develops a family support plan and discharge plan on an ongoing basis.
 - Engages a medical consult with the attending physician for each client every six months.
 - Serves as advocate, caretaker, listener, encourager, enforcer at least once per month.
- Familiar with appropriate sources of referral for mental health, substance abuse, home care, food, transportation and other support services.
- Provide linkages to agency, community and government services and monitor referral completion including state insurance continuation programs, medication patient's assistance programs (PAP), benefits/health coverage programs such as SSI, SSDI, Medicaid, Medicare, housing programs, etc.
- Coordinating, referring and linking clients with additional services e.g. housing support, substance abuse and mental health treatment, food services, etc. as needed;
- Authorizes for transportation for clients or provides transportation as necessary for client to receive medical services and other social aid services as needed.
- Maintain detailed notes of all client interactions, progress notes, other required information reporting as defined by agency standards, and will document all referrals and referral follow-ups.
- Close all cases in a timely manner so new clients may be enrolled from the waitlist.
- Attends weekly/monthly clinical staffing/case conferencing providing input regarding patient medical case management needs. Attends other agency meetings, staff meetings, and other meetings as required.
- Attends educational activities, trainings and events as required.
- All other duties as assigned.

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

Required:

- Good clinical knowledge of human behavior. Good interpersonal skills.
- 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
- Required to make independent judgments without supervision.
- Must be able to generalize, evaluations, or decisions based on sensory or judgmental criteria.
- Must be able to perform under stress when confronted with emergency, critical, or unusual situations.
- Must be capable of dealing with periodic cyclical workload pressures and levels of responsibility.
- 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.
- 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)

Required:
Associate Degree; or High School Diploma (or General Education Degree) with 3 years of related work experience with client population

Preferred:
4-year BS/BA degree in sociology or other related field required or 2-year ASN/nursing degree acceptable

REQUIRED JOB COMPETENCIES (Behaviors - For Effective Job Performance)

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

WORK ENVIRONMENT/PHYSICAL DEMANDS	
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 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 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 type="checkbox"/> tasting/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 week) <input checked="" type="checkbox"/> Frequently (2-3 hours day) <input type="checkbox"/> Continuously (4+ day)
Safety:	lists specifics: Possible exposure to blood and bodily fluids in clinical setting; willing to transport clients in personal vehicle

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 Name Printed: _____

Employee Signature: _____ Date: _____

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