



JOB DESCRIPTION: CLIENT PAYEE/HUD SPECIALIST

Date: July 2013
Grade: 3
Location: Outpatient
Supervisor: Regional Manager
Exempt (Y/N): No

GENERAL PURPOSE: Budgets client income to meet client basic needs as payee for clients of Delta OP and Montrose OP. Coordinates housing services Centerwide for clients who have HUD housing vouchers. Provides advocacy, referral, coordination, and follow-up with community agencies to assist in meeting client needs. Interfaces with clinical staff, psychiatric staff, clients, creditors, Center accounting department, Social Security office, Social Services, landlords, Colorado Department of Local Affairs, and other community agencies.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Meets the Center's standard for:
 - Client Care hours
 - Missed Appointments: i.e. DNS, CBT, CBC
 - Services Plans
 - Completion of All Documentation
- May deliver person centered, culturally sensitive evaluations, trauma informed services as defined by position. These services may be delivered in various locations.
- Works with client and their systems to identify treatment goals and objectives.

Client Payee

- Provides client payee services in regard to finances, bills, and daily living allowances
- Maintains an accounting system dedicated to care of client funds
- Maintains individual account ledgers on each client's fund account. These ledgers must identify all deposits; identify all withdrawals; and reference supporting documentation for all transactions on the client's behalf
- Reconciles client accounts on a monthly basis and prepares monthly projected budgets
- Assists clients with income tax returns and state rebates (heat, property, tax, rent)
- Provides all financial and banking information for end of the month accounting reconciliation
- Provides all needed financial information for annual audit of payee function
- Work with financial auditors as requested as part of annual audit process

Housing Specialist

- Maintains HUD Certifications (every 2 years)
- Maintains appropriate paperwork for Section 8 voucher holders (i.e. monthly reporting to SHHP, client certifications and re-certifications, and tenant placement)
- Attends SHHP sponsored meetings and training sessions to keep abreast of changes in HUD rules and regulations and to maintain housing quality standard certification, laws, and programs
- Maintains working relationships with current landlords and develops new landlord resources (i.e. educates landlords about mental illness, problem solves with tenants, and maintains communication)
- Assists clients with instruction on tenant rights and responsibilities; HUD paperwork; and finding appropriate and affordable housing
- Conducts inspections at least annually to insure HUD HQS standards are maintained

Case Management

- Aids clients in applying for and maintaining needed benefits
- Facilitates educational groups around money management and life skills
- Provides case management services as needed to maintain and facilitate client financial benefits, housing, medical services, transportation and/or any other community/client needs.
- Facilitates client participation in their service plan as a source of emotional support, education, problem solving, and advocacy.
- Observes client behavior and communicates identified mental status changes and/or client needs to appropriate staff to carry out necessary actions plans. Documents actions taken on the Qualifacts record keeping system.
- Collaborates with Center staff to ensure that client needs are met and Center programs run smoothly.
- Maintains client charts/electronic client record according to Center standards
- Attends all staff meetings and educational trainings as required

Center-Wide Essential Duties and Responsibilities

- Responsible for keeping client information confidential by adhering to Colorado law and policies and procedures for the Center.
- Responsible for compliance with applicable federal, state and local laws; professional practice acts and ethical guidelines; policies and procedures of the Center; and contractual guidelines.
- Responsible for supporting the Center's Vision, Mission, Values and Beliefs by practicing and modeling a culture of wellness within a *One Team Mindset*.
- Completes all administrative paperwork and Qualifacts documentation/time sheet as requested/required

- Completes required competency training in Essential Learning and additional training as requested or selected by supervisor
- Reviews and acknowledges Center policies and procedures as requested/required

MISC DUTIES AS ASSIGNED

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position. It is not intended to limit or in any way modify the right of any supervisor to assign, direct, and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

SUPERVISORY DUTIES: None

QUALIFICATION REQUIREMENTS: *To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.*

Education or Formal Training and Experience:

- BA/BS from an accredited program
- Prior experience working with disadvantaged individuals preferred
- Financial management experience preferred

Knowledge, Skill and Ability: (include materials and equipment directly used)

- Ability to operate a computer, learn different computer programs, and enter data on the Center's computerized record keeping systems
- Manual dexterity and mental ability to accurately calculate, budget and enter data in QuickBooks
- Ability to keep accurate records and provide data, reports, and client checks and bill payments in a timely manner
- Knowledge of Excel
- Knowledge of basic mathematics, budgeting, bookkeeping, and accounting sufficient to accurately perform financial transactions as required by the position
- Ability to work with the chronically mentally ill (CMI) and disadvantaged populations in a supportive and non-judgmental manner
- Ability to travel within the Center's catchment area
- Ability to provide services in the mental health Center, schools, jails, emergency rooms, and client homes. This may necessitate travel within the community

- Ability to operate other office equipment, including a calculator, copy machine, telephone and FAX machine
- Ability to concentrate in a sometimes hectic and stressful setting, and with interruptions on a regular basis
- Ability to organize and prioritize work assignments
- Ability to travel to other Center offices
- Ability to communicate verbally and in writing in a manner readily understood by others
- Ability to interact with people in a professional, friendly manner
- Ability to work independently as well as cooperatively and constructively as part of an interdisciplinary team
- Ability to think critically and independently
- Ability to realize and activate potential in every interaction, every day
- Ability to adapt to change in the workplace
- Ability to use change as an opportunity for innovation and creativity
- Ability to inspire and model collaborative teamwork

WORKING ENVIRONMENT/PHYSICAL ACTIVITIES:

- May need to develop a flexible work schedule to provide client advocacy services when the Center's offices are not open or fully staffed
- Must have the ability to provide services in noisy and/or unclean locations in the community
- Must have a valid Colorado driver license
- Works extended hours in front of a computer monitor
- Required to talk and hear
- Often requires sitting and use of hands and fingers, to handle or feel.
- Occasionally required to stand, walk, reach with arms and hands, climb or balance, and to stoop, kneel, crouch or crawl.
- Vision abilities required by this job include close vision.
- The noise level in the work environment is usually quiet to moderate

I have read this copy of my job description, discussed it with my supervisor, and understand my responsibilities.

Signature

Date