



REPRESENTATIVE PAYEE – MONEY MANAGEMENT PROGRAM

Location: Douglas County, Oregon

Salary: \$17.05 - \$21.30 Hourly

Position Open Until Filled

Full Time Position / Position works 40 hours per week. UCAN provides an excellent employee benefit package which can be found here: <https://www.ucancap.org/wp-content/uploads/2022/04/ucan-benefits-2022.pdf>

TRAINED REPRESENTATIVE PAYEE supports independent living for individuals requiring personal finance interventions, such as Representative Payee Services, to receive necessary public benefits and maintain connection to resources promoting wellness and stabilization.

UCAN's Money Management Program provides free assistance with personal money management tasks through specially trained and certified staff. Service is personalized, confidential and safe. Program services are offered to eligible individuals who are at least 60 years of age.

ESSENTIAL JOB DUTIES

Under the direction of the Money Management Program Manager, the Representative Payee will:

- Effectively and accurately receive billing documentation, provide correct payment for billing and maintain proper reporting for agency, Social Security Administration and Oregon Department of Human Services.
- Maintain programs multiple representative payee financial accounts. Receive, audit and process billing invoices or consumer funds requests.
- Maintain banking files and conduct file and record searches as needed by auditor. Respond to questions from staff or vendors regarding payable issues.
- Process request for funds or billings for services utilizing Representative Payee Management accounting system.
- Develop budgeting processes for consumers by preparing beginning financial resources, re-evaluating monthly, and working with program staff to assist consumers' understandings of their needs and capabilities.
- Assist with onboarding of new consumers from APD, APS or other service providers, insuring all required documentations is provided prior to service delivery.
- Prepare monthly financial and invoicing requirements by Oregon Department of Human Services.
- Preparation of yearly auditing required by Social Security Administration.
- ✓ **Regular and consistent attendance is required.**

POSITION REQUIREMENTS

Minimum Qualifications:

- One year work related experience **OR** satisfactory equivalent combination of education, experience and training.
- At time of appointment, must possess valid Oregon driver's license. Out of state license holders are required to obtain Oregon driver's license within 30 days of hire. Finalist must provide court print driving record that meets the requirements of the UCAN Driver Policy as part of contingent offer of employment.
- **Background Investigation:** The finalist for this position is required to pass a criminal history background as part of a contingent offer of employment. Conviction of a crime may not necessarily disqualify an individual from employment.
- This position requires basic knowledge of accounting principles, practices and techniques including, general ledger, budgeting; basic knowledge of automated accounting systems and computer processes and capabilities; basic knowledge of federal, state, and county laws, rules and regulations related to basic accounting and being a representative payee. Must have an excellent understanding of Excel and the ability to work easily and freely in spreadsheet environments.
- This position requires strong computer skills and proficient in 10-key skills. Skill in use of standard office equipment which includes automated equipment and systems.



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- Candidate must be able to communicate effectively in both oral and written forms; maintain confidentiality; plan and organize assigned accounting operations; analyze and prepare detailed fiscal, financial and statistical records; make decisions independently in accordance with established policies and procedures, and use initiative and judgment in completing tasks and responsibilities; coordinate a variety of projects and schedule time to meet deadlines; utilize problem identification and resolution techniques.
- Candidate should have the ability to remain calm and use good judgment during confrontational or high pressure situations.
- Courteously meet and deal effectively with other employees, Federal and State representatives, vendors and the public. Must follow all safety rules and practices, and perform work in a safe manner.
- This position requires bending, carrying, keyboarding, occasionally lifting up to 25 pounds, reaching, sitting, stooping, standing, walking and hearing voice conversation. Requires continuous mental and visual attention.
- Candidate will be required to establish and maintain records and have strong written and verbal communication skills. This position requires running reports and statistical data in an independent work environment.

SUBMIT COMPLETED UCAN APPLICATION TO: ucan.employment@ucancap.org

UCAN Human Resources, 280 Kenneth Ford Drive, Roseburg OR 97470

Website: <https://www.ucancap.org/careers>

Phone: 541-492-3913 FAX: 541-492-3921

UCAN is an Equal Opportunity Employer.

If you require special assistance at any point during the application or selection process and would like to request an accommodation due to a disability, please e-mail a description of your request to Human Resources:

ucanhr@ucancap.org