



CLASS SPECIFICATION

Class Code: 17950
Date Est: 04/2015
Last Rev: 06/2017
Last Title Chg:
FLSA: non-exempt
Probation: 12 months

GUARDIAN CASE MANAGER TRAINEE

DEFINITION

Under immediate supervision, provides paraprofessional, specialized support to journey level Guardian Case Managers to assist with services and placements that fall within a protected person's economic resources; and performs related work as required.

EXPERIENCE AND TRAINING REQUIREMENTS

An associate's degree from an accredited college or university in human services, social work, nursing, business, or a closely related field AND two years of office experience in a public guardian or social services environment including assessing and providing information and making eligibility determinations regarding financial, psychological and/or physical needs; OR an equivalent combination of training and experience.

LICENSE OR CERTIFICATE

A valid driver's license is required at time of appointment.

SUPERVISION EXERCISED

Exercises no supervision.

DISTINGUISHING CHARACTERISTICS

This is the entry level in the Guardian Case Manager classification series, which provides for progression to the next level in the series upon meeting the requirements of the class and recommendation of the appointing authority. This level is intended as a training position to enable incumbents to learn policies, procedures, specific techniques and regulations related to guardianship case management while assisting journey level Guardian Case Managers.

EXAMPLES OF DUTIES *(The following is used as a partial description and is not restrictive as to duties required)*

Perform various paraprofessional level functions to protect, preserve, manage and dispose of the estate of a protected person in accordance with all legal regulations and in their best interests.

Receive guardianship referrals from medical/legal/financial institutions, community service agencies and the general public; review information for accuracy and draft service plans for the care and treatment of protected persons.

Assist journey level caseworkers with the management of the finances of protected persons, including monitoring and documenting all transactions to ensure sufficient resources to pay claims and expenses.

Collect and search for information on next of kin (family members); per court order or direction of attorney, distribute wills, pertinent documents and other assets to appropriate parties while demonstrating diplomacy and tact with grieving family members.

Assist journey level caseworkers with the inventory of a protected person's personal property.

Compile necessary documents for legal proceedings, attend hearings and may provide required testimony.

Monitor guardianship termination proceedings to ensure compliance with statutory requirements, keep attorney of record and Public Guardian informed and provide pertinent support materials and data as necessary to remedy any deficiencies in a timely manner.

Maintain complete and accurate case notes; maintain accurate records and files; write correspondence, reports and other written materials which detail the circumstances and resolution of individual case for inclusion in the permanent records of the Public Guardian's office; may prepare statistical reports and summaries.

Explain departmental and program rules, regulations and procedures; assist protected persons in completing required forms and in gathering necessary documentation.

Contribute to the efficiency and effectiveness of the unit by offering suggestions and participating as an active member of a work team.

JOB RELATED AND ESSENTIAL QUALIFICATIONS

Full Performance *(These may be acquired on the job and are needed to perform the work assigned.)*

Knowledge of:

Aspects of legal guardianship and estate administration.

State laws applicable to guardianship and estate administration.

Basic methods and techniques involved in the management of personal finances.

Ability to:

Deal effectively with hostile, aggressive and abusive protected person.

Entry Level *(Applicants will be screened for possession of these through written, oral, performance or other evaluation methods.)*

Knowledge of:

Basic dynamics of human behavior.

Ability to:

Coordinate available community resources and services to meet the needs of protected persons.

Research information related to protected person referrals and document findings.

Gather, organize, analyze, and present a variety of data and information in a clear, accurate and concise manner, both in oral and written formats.

Maintain confidential data and information.

Establish, foster and maintain effective working relationships with those contacted in the course of work including medical professionals, community agencies and the public.

SPECIAL REQUIREMENTS *(Essential duties require the following physical skills and work environment.)*

Ability to work outside and independently travel to various locations where protected persons reside. Ability to tolerate exposure to unsanitary, hazardous or hostile environments. Ability to physically assist protected persons with ambulation, mobility, entry and exit to vehicles and buildings. Ability to work in a standard office environment. Ability to operate office equipment including, but not limited to, computers, telephones, calculators, copiers and fax machines.

This class specification is used for classification, recruitment and examination purposes. It is not to be considered a substitute for work performance standards.