

Volunteers of America of Oklahoma
Job Description

Title: Payee Services Coordinator
FLSA Classification: Non-Exempt
Career Band: Professional (P1-P2)
Department: Payee Services
Reports to: Leader of Payee Services

Job Summary:

The Payee Services Coordinator provides payee services in Tulsa, Muskogee, Oklahoma City and future expansion counties to various populations to assist them with the budgeting of their Supplemental Social Security and/or Social Security income and other benefits the client may be entitled to.

Job Duties:

1. Provide payee support services to the mentally ill, homeless or near homeless, physically disabled and aging populations to assist them with the budgeting of their Supplemental Social Security and/or Social Security income, and other benefits one may be entitled to as their Representative Payee as recognized by the Social Security Administration.
2. Use benefits received for client to meet current needs with food, clothing and shelter having top priority.
3. Provide proper accounting to Social Security for the use of client's benefit funding.
4. Responsible for the intake, processing and explaining of the Payee Services Program to the respective client.
5. Process and mail all checks that need to be written for that particular day to ensure clients' bills are paid in a timely manner.
6. Answering incoming phone calls and voice messages.
7. Responsible for completing and filing all necessary paperwork from the Social Security Administration, including yearly Representative Payee Reports.
8. Responsible for completing monthly budgets for each client to show how the client's income will be distributed.
9. Maintain a close working relationship with community agency case managers and staff, ensuring clients are getting the optimal services they need.
10. Provide light case management duties for client as needed.
11. Provide advocacy on the client's behalf.
12. Deposit all client income checks.

13. Maintain accurate client notes.
14. Assist accountants with accounting duties as requested.
15. File copies of client checks, deposits and monthly bank logs.
16. Provide additional support/backup to other Payee Service Agents.
17. Provide coverage as scheduled for the corporate Receptionist (Tulsa office only).
18. Any other duties assigned by the Leader of Payee Services.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. The employee is required to walk, stand, sit for prolonged periods, climb, balance, stoop, kneel, crouch or crawl. The employee must frequently lift or move objects weighing up to 10 pounds and occasionally lift or move objects weighing up to 50 pounds. Frequent pushing and pulling is also required.

Qualifications and Skills:

Required:

- Bachelor's Degree in social services, business or public relations field or equivalent work experience as determined by the Leader of Payee Services and/or the Director of Human Resources.
- Social work and/or case management experience, preferably in the mental health or community services field.
- Accounting software experience, preferably Quick Books Pro.
- Excellent oral and written communication skills.
- Ability to maintain accurate records and present data contained in those records in a timely manner.
- Ability to share information through teaching and training.
- Competent user of all MS Office Suite applications (Outlook, Word, Excel, PowerPoint, etc.)
- Knowledge of communities where Payee Services are provided.
- Ability to relate effectively with people.
- Must have and maintain a working telephone contact number.
- Possess a valid Social Security Card.
- Possess a valid Oklahoma Driver's License.
- Have reliable transportation.
- Proof of current car insurance (your name must be on the policy).
- Maintain an acceptable driving record, Oklahoma State Bureau of Investigation criminal history checks, and Community Service Registry Record checks.

- Ability to maintain confidentiality.
- Ability to exercise patience, understanding, creativity, and flexibility.

Certification of Understanding:

The company reserves the right to revise or change job duties as business needs dictate. It is mutually agreed that this job description does not constitute a written or implied contract of employment. It is understood the company reserves the right to change the work schedule as required, to include overtime.

I have read and understand this job description and the professional expectations of the position. I acknowledge this description provides a representative summary of the major duties and responsibilities of the position and that other job related tasks may be assigned by my supervisor.

This position is subject to random drug testing. Refusal to take a drug and/or alcohol test will be grounds for immediate dismissal.

I also understand and recognize that I retain the option, as does Volunteers of America of Oklahoma, to end my employment at any time, with or without notice and with or without cause. As such, your employment with Volunteers of America of Oklahoma is at-will and neither this job description nor any other oral or written representations may be considered a contract for any specified period of time.

Employee Signature: _____ Date: _____

Employee printed name: _____