



TITLE: Public Guardian/Public Administrator Support Specialist

BOARD APPROVED: ~~October 17, 2023~~

**FLSA: Non-Exempt
BARGAINING UNIT: Misc.**

DEFINITION

Under direct supervision, provides money management and education, advocacy and referral, and case management services for adults with mental health services who are receiving federal or state benefits; to apply complex federal, state, and local policies to achieve Representative Payee Program objectives; provides a variety of specialized legal, secretarial and clerical support on behalf of the Public Guardian/Public Administrator's ~~division-Office~~.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from the Supervising Deputy Public Guardian/Public Administrator. No direct supervision of staff is exercised.

CLASS CHARACTERISTICS

This is a specialized, journey level classification assigned to the Public Guardian/Public Administrator's ~~division-Office~~ that performs complex legal, secretarial and financial management services for the department. This classification also exclusively provides financial management for clients of the Representative Payee Program. This classification is distinguished from the Case Resource Specialist series by the allocation to the Public Guardian/Public Administrator's ~~division-Office~~ and the specialized duties and assignments the incumbent is tasked with.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

- Provides money management, advocacy and referral, education, and case management duties primarily for adults with mental health issues who are receiving federal or state benefits.
- Determines eligibility for services through interviews, documents, and collateral investigations; explains agency services, prepares a budget with the client, payment delivery and client rights and responsibilities.
- Maintains financial records and budgets for representative payee clients by issuing checks; maintaining checkbook records; making bank deposits; paying rent, food, utility, medical and other bills; and ensuring clients have funds for individual needs.
- Communicates any unusual circumstances regarding client's information to Social Security Administration.
- Establishes working relationships with client creditors and state or federal agencies; consult with them on services provided to clients; negotiate with creditors on debt

issues; and inform clients about programs such as food stamps and low income housing.

- Maintains contact with families and individuals as often as necessary to assist in the implementation of service plans.
- Ensures complete, accurate case documentation as required by State and County regulations and standards.
- Coordinates with other community services and businesses to provide clients maximum assistance.
- Acts as advocate for families and individuals receiving mental health services.
- May assist in preparing for Social Security and Veteran's Administration audits of Representative Payee Program and Conservatorships.
- Prepares, processes, verifies, and reviews forms, schedules, records, reports, lists, and other legal documents for completeness and conformance with established regulations and procedures.
- Performs a wide variety of general clerical duties to support departmental operations; including composing letters and other correspondence, filing, preparing records and monthly reports, scheduling appointments, process travel claims for staff, and maintaining calendars.
- Gathers, assembles, updates, and distributes a variety of department specific information, reports, forms, records, and data as requested.
- Organizes and maintains various administrative, confidential, reference, imaging, and follow-up files; purges files as required; establishes and maintains complex files related to conservatorship caseload.
- Screens calls, visitors, and mail; responds to complaints and requests for information; assists in interpreting and applying regulations, policies, procedures, systems, and rules in response to inquiries and complaints from public; directs callers to appropriate County staff.
- ~~Assists in preparing departmental budget; monitors budget.~~
- ~~Assists with transport of clients as needed.~~
- ~~Assists with inventory and disposal of client assets.~~
- Prepares contracts and purchase agreements for the department.
- Orders and maintains office supplies, checks inventory, and other related duties.
- Responsible for County vehicles including delivery and pick up from approved vendors and reporting maintenance issues to appropriate staff.
- Serves on committees as requested.
- May coordinate special projects as assigned.
- Reports documented or suspected abuse and neglect as mandated by law.
- Compliance with all relevant laws and regulations regarding confidentiality.
- Performs related duties as required.

QUALIFICATIONS

Knowledge of:

- Case management and interviewing techniques;
- Laws, rules and regulations applicable to mental health services and treatment;
- Available community resources;
- Applicable Federal, State, County, Department, and Division laws, regulations, policies and procedures;
- Legal terminology and court protocol and practices;

- Public Guardian/Public Administrator policy and procedures;
- Business letter writing and the standard format for reports and correspondence;
- Practices of financial and accounting document processing and record keeping, including payroll, accounts payable, accounts receivable, and purchasing;
- Computer applications related to the work;
- Modern office administrative and secretarial practices and procedures, including the use of standard office equipment;
- English usage, grammar, spelling, vocabulary, and punctuation;
- Techniques for providing a high level of customer service to the clients, public and County staff, in person and over the telephone.

Ability to:

- Develop effective budget plans for clients;
- Develop, identify and coordinate services;
- Establish rapport with mentally or emotionally disturbed clients;
- Establish rapport with older population in need of services;
- Comprehend complex manuals and handbooks and follow the orderly directions they provide;
- Make sound, educated and ethical decisions;
- Perform responsible legal secretarial and office administrative work requiring the use of tact and discretion;
- Organize own work, coordinate projects, set priorities, meet critical time deadlines, and follow-up on assignment with minimal direction;
- Compose correspondence and reports independently or from brief instructions;
- Maintain significant flexibility in daily operations and decision making;
- Prepare accurate financial calculations, summaries and reports;
- Handle sensitive and confidential documents;
- Read and interpret technical materials pertaining to the responsibilities of the job;
- Communicate effectively in written and oral form;
- Assemble and analyze information and prepare written reports and records in a clear, concise manner;
- Work independently and as a team member;
- Operate modern office equipment including computer equipment and specialized software applications programs;
- React calmly and professionally in emergency, emotional and/or stressful situations.

Education and Experience:

Any combination of training and experience which would provide the required knowledge, skills and abilities is qualifying. A typical way to obtain the required qualifications would be:

- Equivalent to the completion of the twelfth (12th) grade.
- Two (2) years of college with coursework in human services, psychology, accounting, business, or related field is preferred.
- Two (2) years of professional experience providing direct service to clients in human services, education, counseling, health, or other relevant service is preferred. Experience working in a Public Guardian/Public Administrator Office is highly desired.
- Other combinations of education and experience may be considered.

License and Special Requirements:

- Possession of, or ability to obtain and maintain, a valid California Class C Driver License and a satisfactory driving record is required. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer and copier; strength stamina, and mobility to perform light to medium physical work including transporting mail, supplies, filing, operating a motor vehicle and visiting various County and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups and over the telephone. Finger dexterity is needed to access, enter, and retrieve data manually as well as using a computer keyboard, typewriter keyboard, or calculator, to set up and file various data and records, and to operate standard office equipment. Positions in this classification occasionally bend, carry, stoop, squat, twist, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to constantly move about on foot and to lift, carry, reach, push, and pull materials and objects, up to 30 pounds, as necessary to perform job functions.

WORKING CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may be exposed to dust, scents, and fumes. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. Employee may be subject to irregular working hours and moderate stress due to deadlines and hostile clients.

**EQUAL OPPORTUNITY EMPLOYER / AMERICANS WITH DISABILITIES ACT
COMPLIANT / VETERANS' PREFERENCE POLICY / DRUG-FREE WORKPLACE**

| (05/17/16, 10/17/23)