



POSITION DESCRIPTION

Rep-Payee Assistant Coordinator

SUMMARY:

The Representative Payee Assistant Coordinator is an individual committed to serving those in need who provides case management to clients receiving representative payee services at New Bethany.

ACCOUNTABILITY:

The Rep-Payee Assistant Coordinator is accountable to the Finance Director.

SPECIFIC RESPONSIBILITIES:

The Rep-Payee Assistant Coordinator will:

1. Complete intake and assessment for clients requesting representative payee services
2. Create electronic file in Teams for Client paperwork and case notes
3. Process Repayee application
4. Prepare documents to open a bank account once benefit check is received
5. Enter client in New Org database
6. Keep informed about the client's needs to ensure benefits are being used for the client's personal care and well-being;
7. Meet with clients as needed
8. Prepare bank deposits for funds that are not direct deposit
9. Update Client reconciliation in excel spreadsheet
10. Reconcile individual client bank accounts
11. Assist with monthly reconciliation, bank transfer and check printing as needed
12. Assist with Social Security Audit Preparation
13. File all paperwork according to policies and procedures
14. Perform all other duties as assigned by his/her Supervisor.

QUALIFICATIONS:

1. A high school diploma.
2. Experience in bookkeeping/accounting is required
3. Experience in Human services is preferred.
4. Employee must be 21 years or older

GENERAL:

The Rep-Payee Assistant Coordinator is a full-time, non-exempt (hourly) employee of New Bethany, Inc. and as such is covered by the applicable portions of the Personnel Policy.

June 10, 2024