



COMMUNITY ACTION PARTNERSHIP  
Dickinson, North Dakota

Position Description

Department: Region I – Client Services Status: Non-exempt  
Position Title: Representative Payee Grade Level: D  
Immediate Supervisor: Region I - Client Services Director

Management Approval: \_\_\_\_\_ Date: \_\_\_\_\_  
Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

All position descriptions are subject to change as business requirements dictate.

**A. GENERAL SUMMARY OF RESPONSIBILITIES:**

Manages the financial affairs of clients. Pay bills for clients and keeps accurate records of all transactions. Educates and makes necessary recommendations to clients on balancing checkbooks, prioritizing bills and maximizing usage of client resources. Provides backup assistance to other programs.

**B. SPECIFIC JOB RESPONSIBILITIES:**

The job responsibilities listed do not include all the specific tasks which the employee may be expected to perform.

- 1. Demonstrated support for the agencies mission, goals and values.
- 2. Identifies professional and organizational issues and trends suggesting action, facilitating change and participates in restructuring of programs and services.
- 3. Maintains staff, client and agency wide confidentiality at all times.
- 4. Serves as liaison between departments in the agency and with other agencies and programs to fulfill the mission of the agency.
- 5. Prepares various statistical and narrative reports to meet all Agency, Government and Grant requirements.
- 6. Attends meetings, workshops, and training sessions as approved by the Program Director.
- 7. Participates on program related committees as approved by the Program Director.
- 8. Is required to travel by ground or air to meetings, conferences, trainings, etc.
- 9. Monitors clients within the department.
- 10. Continues professional growth through educational and training experiences in their field.
- 11. Manages payee client’s finances, maintains checking and savings accounts, budgeting, and assists individuals in working towards a financial plan.
- 12. Assists individuals with paperwork for housing, social services and various support structures.
- 13. Keeps all reporting of funds in custody up to date utilizing the client tracking software and Quicken software.
- 14. Assist the clients in developing strategies to address financial problems.
- 15. Deals with creditors in developing strategies to address financial problems.
- 16. Provides appropriate referrals for clients needs (i.e., legal services, support services in the community).
- 17. Maintains contact with Social Security Administration and case managers.
- 18. Pick up and deliver items for the agency using company or personal vehicle.
- 19. Provides assistance to other program staff in the Client Services department.

**C. SUPERVISORY RESPONSIBILITIES:**

None

**D. POSITION QUALIFICATIONS (KNOWLEDGE, SKILLS, ABILITIES):**

Required

1. High School Diploma, GED or the equivalent.
2. Two years full-time experience in office administration.
3. Experience working with people from various socio-economic and educational backgrounds.
4. Must possess a valid driver's license and insurable driving record.
5. Demonstrated ability to establish a positive rapport with staff, clients, other agencies, businesses and the community.
6. Demonstrated ability to effectively communicate both in written and oral forms.
7. Proficient with computers and software to include Windows, Internet, Microsoft Office software and other office equipment.
8. Working knowledge of the client-tracking program & Quicken software within 2 months of hire and proficiency within 6 months.
9. Demonstrated personal budgeting skills.

**E. PHYSICAL DEMANDS:**

Constantly:

Vision correctable to near 20/20.

Frequently:

Sitting, walking, stooping, crouching, kneeling, reaching horizontally and vertically, standing, bending, balancing, use of arms, legs, hands and feet and fine motor skills, color discrimination, peripheral and depth perception, talking and hearing, running, climbing stairs and ladders, crawling, twisting and turning trunk, rapid mental-muscular coordination, reaching down and overhead, pushing and pulling, lifts and carries up to 25 pounds.

**F. WORK ENVIRONMENT:**

Frequently:

Works in a variety of working conditions including indoor in controlled and uncontrolled environments. High stress situations.