

Account Navigator Job Description



Job title: Account Navigator	Work Location: Rutherford Office/Remote
Program: Financial Services	Reports to: Unit Supervisor
Position Status: Full-time Job Code: 113 Position FLSA Classification: Non-Exempt	Salary Range: \$25.52/hour

The Account Navigator provides Representative Payee services to clients in accordance with agency and Social Security Administration (SSA) regulations. These responsibilities include the creation of a budget, submission of payments, verification and reconciliation of all transactions, while ensuring accuracy and thorough documentation. The Account Navigator will interact directly with clients and authorized supports to ensure client's basic needs are met while maintaining professional boundaries. This position requires the ability to work and thrive in a fast paced, multi-tasking environment.

Essential Duties and Responsibilities:

- Complete new client intake and serve as primary point of contact to assigned client list
- Develop a budget and distribute funds in accordance with plan. Budgets will meet primary needs such as rent and utilities, and secondary needs with remaining funds dispersed to the clients as needed
- Maintain communication with clients and authorized supports regarding financial needs and budget changes
- Contact vendors (utility companies, medical services, landlords, etc.) to initiate services, negotiate rates and establish payment plans.
- Schedule and/or issue payments to vendors, disperse funds, and implement automated transactions
- Collect supporting documentation for all requested payments and disbursements
- Maintain accurate record of all financial transactions, monitor accounts in accordance with resource limitations
- Reconcile client ledger to ensure funds are received, payments are processed, and account remains in good standing
- Adhere to Organizational Rep Payee guidelines; including but not limited to reporting address changes, earned income, monitoring benefit limits, ensuring completion of SSA disability reviews and renewals
- Complete accurate and timely data entry in Apricot database including client information, updates, and progress notes
- Conduct contract reporting within required parameters
- Develop and maintain tracking system for client physical and electronic file
- Attend agency staff meetings, trainings, and activities when appropriate
- Maintain client confidentiality, including but not limited to, personal identifying information, financial and medical records
- Perform special projects as assigned

Education and/or Work Experience Requirements:

- Bachelor's degree in Social Work, Human Services, or related field OR any combination of education and experience that is equal to the minimum requirements
- 1 year case management experience working with special needs populations; adults experiencing homelessness, adults with disabilities, and/or the elderly preferred
- Experience or understanding of Social Security Income and benefits
- Experience with community services, resources, and entitlements preferred
- Proficient in Microsoft Office Software applications and Outlook 365 features, databases (Apricot experience a plus)
- Experience with basic client budgeting and financial planning
- Working knowledge of Quicken, QuickBooks, Exact or similar accounting software preferred
- Reliable transportation with valid Texas Driver's License and active auto insurance
- Clear multi-state criminal history and motor vehicle driving record
- Negative TB skin test or clear chest x-ray (required for credentialed staff only)

Competencies:

- Ability to develop productive relationships with FEC leadership, coworkers, volunteers, and external partners
- Ability to cultivate and sustain professional boundaries with clients, coworkers, volunteers, and external partners
- Ability to work independently and as a team member to carry out assignments within parameters of instructions given, prescribed routines, and standard accepted practices
- Ability to work under pressure and meet deadlines, while maintaining a positive attitude and providing exemplary service
- Ability to keep accurate and organized records
- Ability to clearly communicate in person, electronically, and by telephone
- Ability to organize work efficiently and prioritize response to changing needs of the program
- Ability to develop clients' budgets and maintain financial records according to standards
- Openness to working with special needs populations: adults experiencing homelessness, adults with disabilities, veterans, and/or the elderly

Working Conditions/Physical Requirements:

- Ability to safely and successfully perform the essential job functions consistent with the ADA, FMLA and other federal, state and local standards, including meeting qualitative and/or quantitative productivity standards.
- Ability to maintain regular, punctual attendance consistent with the ADA, FMLA and other federal, State, and local standards
- Must be able to lift and carry up to 20 lbs.
- Ability to work remotely up to 75% of time

Acknowledgement and Review:

By signing this job description, I acknowledge that I meet the qualifications, and am able to perform all job functions, duties, and responsibilities ☐ with or ☐ without reasonable accommodations. I further understand that I am responsible for promptly and effectively communicating in writing to the Company any need for accommodation. I acknowledge that I have read, understand, and may receive a copy of this Job Description. I further understand that Family Eldercare reserves the right to modify any Company policies, procedures, and processes based on organizational needs.

Print Employee Name:

Employee signature:

Date: