



CLASS SPECIFICATION

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FLSA: non-exempt
Probation: 12 months

GUARDIAN CASE MANAGER III

DEFINITION

Under direction, manages the personal and/or financial affairs of a “protected person” under a court ordered guardianship who is no longer able to manage his/her own affairs due to a medical, mental, or physical disability within the guardianship laws of the state; oversees the most complex guardianship referrals; and performs related work as required.

EXPERIENCE AND TRAINING REQUIREMENTS

A bachelor’s degree from an accredited college or university in human services, social work, criminal justice, nursing, psychology, business, or a closely related field AND three years of case management experience including interviewing or assessing people and information and making determinations regarding psychological and/or physical needs; OR an equivalent combination of training and experience.

LICENSE OR CERTIFICATE

A valid driver’s license is required at the time of appointment.

Certification as a National Certified Guardian at the time of appointment.

DISTINGUISHING CHARACTERISTICS

This is the journey level class in the Guardian Case Manager class series. It is distinguished from the Guardian Case Manager II by its ability to independently manage a full caseload including the most complex guardianship cases with minimal direction. Incumbents are expected to provide training and lead direction to the Guardian Case Manager I and II.

SUPERVISION EXERCISED

May provide lead direction over technical and support staff.

EXAMPLES OF DUTIES *(The following is used as a partial description and is not restrictive as to duties required.)*

May perform any of the Examples of Duties listed in the Guardian Case Manager II job classification.

Responsible for the most complex guardianship cases from medical, legal, financial institutions, community service agencies and the general public; review information for accuracy to determine the appropriate action for each case, developing action plans for the care and treatment of protected persons.

Determine appropriateness for guardianship services through a review of current circumstances and/or financial status as well as the existence of other individuals who may be qualified to serve as guardian or identify other alternatives to public guardianship; may develop and implement court-ordered recommendations for case disposition and the need for guardianship.

Present germane information to legal counsel for the purpose of participating in court to establish, maintain, modify, or terminate a legal guardianship; testify in court proceedings or arrange for witnesses to testify relative to the situation of protected or proposed protected persons.

Assess the financial and physical needs of protected persons through interviews with protected persons, relatives, or other concerned individuals to make eligibility determinations and coordinate available community resources and professional care to meet protected person needs within their economic means; provide ongoing assessment of protected person needs to maintain optimum quality of life and care within available resources.

Assist in the management of the finances of protected persons, monitoring and documenting all transactions to ensure sufficient resources to pay claims and expenses; provide financial status reports to the courts in compliance with accepted fiduciary standards and Nevada Revised Statutes.

Conduct investigations to guide the management, disposal or sale of assets or property by contacting financial institutions and local agencies to gather more precise information regarding protected persons finances.

Inventory personal property (e.g. furniture, firearms, jewelry, clothing) of protected persons in residences and/or nursing homes, hospitals and other care facilities; secure residences and assume custody of property as appropriate to ensure preservation of property for the benefit of the protected person.

Conduct periodic security checks on real property or apartments of protected persons to safeguard against burglary, theft, and vandalism.

Locate and notify next-of-kin or interested parties of guardianship and gather collateral data as needed to inform guardianship plan.

Arrange for the disposal of real and personal property or other assets, in accordance with Nevada Revised Statutes (NRS) and department policy and procedures when in the best interest of the protected person or when the estate cannot sustain associated expenses by communicating with real estate agents, auction houses, financial institutions and other appropriate professionals to sell these assets to enable the estate to pay for the cost of care of the protected person or the liabilities of the estate.

Marshal assets and property from protected persons residence or wherever it may reside; determine proper storage location by type of property; maintain chain of custody for every item of property; and prepare accounting transmittal for deposit found monies. Input detailed records into a computer terminal regarding the inventory and storage location of found property; verify accuracy of information, and update information as needed.

Consult with public officials, agency representatives and other professionals regarding the provision of services and problem resolution.

Act as a lead for the Guardian Case Manager I and II, support staff, and interns as directed by supervisor to include training, development, overview, assignment, and review of work; establish work procedures; provide input into performance evaluations; may assist in the interview and hiring process.

May participate in Quality Assurance Peer Reviews and Audits and identify deficiencies according to department policy and remediation tasks needed to bring documentation into compliance.

May assist management in the review of legislative actions.

May assist management in policy and procedure review and suggest changes.

May participate on task forces and community and interagency entities at the local, state, or national level.

JOB RELATED AND ESSENTIAL QUALIFICATIONS

Full Performance Level *(These may be acquired on the job and are needed to perform the work assigned.)*

Knowledge of:

Department and countywide policies, practices, and procedures.

Aspects of legal guardianship and estate administration.

State laws and County regulations applicable to guardianship and estate administration.

Legal responsibilities of the Public Guardian in Washoe County.

Basic methods and techniques to prevent the spread of infectious and contagious diseases.

Inventory methods and techniques.

Methods and techniques involved in the management of personal finances.

Federal, state, and county benefit and entitlement programs.

Federal Firearms Regulations when acquiring or distributing estate firearms.

Principles, practices, methods, and techniques of maintaining and processing property including those used in the collection, handling, preservation, labeling, storage, and disposition of property.

Software specific to the Public Guardian's Office.

National Guardianship Standards and Ethics

Protected Person's Bill of Rights

Elements of Supported Decision Making and how to implement within a guardianship case.

Ability to:

Perform a broad range of the most complex casework duties.

Independently manage the affairs of Washoe County protected persons, meeting all relevant standards for care.

Serve as a lead over the Guardian Case Manager I and Guardian Case Manager II, support staff, and interns to include providing effective training and guidance on case management and related duties.

Entry Level (*Applicants will be screened for possession of these through written, oral, performance, or other evaluation methods.*)

Knowledge of:

Casework preparation, principles, objectives, and practices.

Interviewing methods and techniques.

Socio-economic conditions, trends, and factors impacting protected persons.

Methods and techniques of case management data collection and report preparation.

Ability to:

Read, interpret, and apply pertinent laws, regulations, and standards, including eligibility criteria, legal/financial documents and departmental policies and procedures.

Coordinate available community resources and services to meet the needs of protected persons.

Research information related to protected person referrals and document findings.

Gather, organize, analyze, and present a variety of data and information in a clear, accurate and concise manner, both in oral and written formats.

Formulate and modify case plans in conjunction with client needs.

Operate a computer and a variety of software.

Establish and maintain rapport with the protected person on an individual basis.

Maintain confidential data and information.

Safely operate a motor vehicle.

Write comprehensive evaluations, reports, and recommendations.

Evaluate work priorities, procedures, and processes to determine their effectiveness and efficiency.

Exercise emotional control, especially under stressful situations.

Deal effectively with hostile, aggressive and abusive protected persons, family, or caregivers.

Interview and interact effectively with critically ill, mentally incapacitated or dying protected persons, maintaining confidentiality, sensitivity, integrity, and tact in communications regarding guardian cases.

Maintain effective working relationships with those contacted in the course of work including medical professionals, community agencies and the public.

SPECIAL REQUIREMENTS *(Essential duties require the following physical skills and work environment.)*

Ability to work outside and independently travel to various locations where protected persons reside. Ability to tolerate exposure to unsanitary, hazardous or hostile environments. Ability to physically assist protected persons with ambulation, mobility, entry and exit to vehicles and buildings. Ability to work in a professional office environment. Ability to operate office equipment including, but not limited to, computers, telephones, calculators, copiers and fax machines, and scanners.

This class specification is used for classification, recruitment, and examination purposes. It is not to be considered a substitute for work performance standards.