GUARDIAN CASE MANAGER I

DEFINITION

Under general supervision, 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; and performs related work as required; 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, nursing, business or a closely related field AND one year of case management experience including interviewing people, assessing information and making determinations regarding financial, psychological and/or physical needs; OR an equivalent combination of training and experience.

LICENSE OR CERTIFICATE

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

SUPERVISION EXERCISED

Exercises no supervision.

DISTINGUISHING CHARACTERISTICS

This is the second level in the Guardian Case Manager classification series that provides for progression to the next level in the series upon meeting the requirements of the class and recommendation of the appointing authority. Incumbents are expected to manage a broad range of guardianship cases under less supervision. It is distinguished from the Guardian Case Manager II by the fact that incumbents in the Guardian Case Manager I class are not performing full journey level assignments.

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

Receive guardianship referrals 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 a proposed protected person’s eligibility for guardianship services through a review of current circumstances and/or financial status to establish the existence of other individuals (if any) qualified to serve as guardian, or identify other alternatives to public guardianship.

Present germane information to legal counsel for the purpose of petitioning the court to establish, maintain, modify or terminate a legal guardianship; may 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 a protected person 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.

Manage or 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.

Arrange or assist with the arrangements for the sale of real and personal property through multiple listing services, public auction and related services, in compliance with Nevada Revised Statutes.

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

**JOB RELATED AND ESSENTIAL QUALIFICATIONS**

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

**Knowledge of:**
Casework preparation, principles, objectives and practices.

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.

Methods and techniques involved in the management of personal finances.

Software applications specific to the Public Guardian’s Office.

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

Deal effectively with hostile, aggressive and abusive protected persons.

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

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

**Knowledge of:**
Interviewing methods and techniques.

Crisis intervention strategies.

**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.

Establish and maintain protected person rapport on an individual basis.

Maintain confidential data and information.

Establish, foster and 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 standard office environment. Ability to operate office equipment including, but not limited to, computers, telephones, calculators, copiers and fax machines.

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