

**GENERAL DESCRIPTION OF CLASS**

The VETERANS TRUST OFFICER represents the Director of Veterans' Affairs as conservator in managing the estates of protected persons.

**DISTINGUISHING FEATURES**

This is a single classification and not currently part of a series of classes.

**DUTIES AND RESPONSIBILITIES**

- 1.Marshalls Assets.** Typical tasks: evaluates and records social histories of protected persons; determines assets, resources, and liabilities; takes possession of all assets on behalf of the Director of Veterans' Affairs, including real and personal property and monthly incomes from all sources.
- 2.Financial Support.** Typical tasks: applies on behalf of the Director of Veterans' Affairs as payee for Veterans' Administration, Social Security, Workers' Compensation, civil service annuities, and all other benefits to which protected persons are entitled; arranges with institutions, nursing homes, rooming houses, and individuals to provide for the necessary care of protected persons; arranges for medical needs, personal expenses, and other items within the ability of their resources to pay; arranges with public welfare for supplemental assistance, if needed.
- 3.Estate Management.** Typical tasks: approves or denies claims against estates and requests for expenditures of funds; buys and sells real estate and special items; evaluates all billings and claims; invests funds on behalf of the protected person after considering assets and future needs; provides information and accountings required by courts; requests legal services from the Attorney General's office on matters involving conservatorship as needed; appears in court and testifies regarding the management of estates and other matters; submits timely inventories as required by statute; investigates the estate status of protected persons; determines proper disposition of estates to heirs, administrators, or executors in case of death; counsels and advises heirs about estates; proposes appropriate procedures in estate settlements.

**RELATIONSHIPS WITH OTHERS**

Employees in this class have regular telephone contact with disabled protected persons to respond to requests for funds, answer questions, and resolve problems; with landlords, care providers, and social workers to establish living arrangements, approve or disapprove monetary requests, and answer general inquiries; with employees of Federal and State agencies to apply for benefits and resolve client problems; with hospitals, physicians, and dentists to arrange payment for services and to coordinate insurance benefits; and with merchants, utility companies, insurance agents, and others to arrange payment for goods and services. Employees in this class also have occasional telephone contact with attorneys and court officials to seek advice, discuss legal problems, and resolve annual accounting discrepancies. Trust Officers occasionally meet in person with clients to answer request, discuss budgets, and inspect living conditions.

**SUPERVISION RECEIVED**

Employees in this class receive general supervision from a manager who reviews ongoing case files for compliance with agency goals and policies. Most work is generated from outside of the agency as clients and their care providers make requests for assistance. Because many requests are unprecedented, the available guidelines are incomplete and must be developed or adapted to the specific circumstances of each task.

Employees in this class use Oregon Revised Statutes to follow the laws pertaining to conservators, resolve landlord-tenant disputes, determine probate procedures and resolve other civil matters; Federal laws and regulations to obtain all possible monetary benefits from Federal agencies; State and Federal tax laws to determine taxable income and file tax returns for protected persons; and agency policies and procedures to ensure that the agency's mission and goals are met.

**KNOWLEDGE, SKILLS, AND ABILITIES (KSA)**

General knowledge of auditing principles and generally accepted accounting principles and practices.

General knowledge of laws and regulations governing the U.S. Veterans Administration.

Basic knowledge of laws governing conservators.

Basic knowledge of laws, procedures, and regulations involving public assistance.

Basic knowledge of laws, procedures, and regulations involving disability claims of other agencies.

Skill in writing business letters and memoranda in direct, understandable language.

Skill in analyzing and interpreting laws, rules, or regulations and applying them to specific circumstances.

Skill in evaluating facts and determining appropriate action.

Skill in organizing and prioritizing tasks.

Ability to work independently and with minimal supervision.

Ability to apply tact and diplomacy with others to gain cooperation.

Ability to explain decisions and ideas clearly, concisely, and patiently.

Ability to establish and maintain harmonious working relationships with people of differing socioeconomic backgrounds, including those who may be hostile or physically or mentally ill.

Ability to testify in court or at administrative hearings.

**NOTE:** The KNOWLEDGE and SKILLS are required for initial consideration. ABILITIES may be required for initial consideration, at any time during the selection process, or during a trial service period as a final stage of the selection process. Some duties performed by positions in this class may require different KSA's. No attempt is made to describe every KSA required for **all** positions in this class. Additional KSA requirements will be explained on the recruiting announcement.

Adopted 4/90

Revised

Examples of work are typical of duties assigned to this class. No attempt is made to describe every duty performed by all positions in this class.