STATE OF OREGON
POSITION DESCRIPTION

Agency: Office of Long-Term Care Ombudsman/ Oregon Public Guardian Program

Facility: Office of the Long-Term Care Ombudsman

New  □ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: Office Specialist 2

b. Classification No: C0104

c. Effective Date: __________________________

d. Position No: Temp

e. Working Title: OPG Program Support

f. Agency No: 11400

g. Section Title: Office of Public Guardian

h. Budget Auth No: ____________________________

i. Employee Name: Vacant

j. Repr. Code: XA

k. Work Location (City – County): Salem

l. Supervisor Name: Chris Rosin

m. Position: ☐ Permanent  ☐ Seasonal  ☐ Limited Duration  ☐ Academic Year

☐ Full-Time  ☐ Part-Time  ☐ Intermittent  ☐ Job Share

n. FLSA: ☐ Exempt  ☐ Non-Exempt

If Exempt: ☐ Executive  ☐ Professional  ☐ Administrative

☐ Yes  ☐ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who’s affected, size, and scope. Include relationship to agency mission.

The Oregon Public Guardianship Program (OPG) is a statutorily authorized, statewide program. The OPG serves as a court-appointed guardian and/or conservator for adults with limited decision-making ability. OPG will provide limited and full guardianships and conservatorships (G/C) to individuals who have no responsible family member and friend to serve as their guardian or conservator, nor the resources to pay for a private guardian or conservator. In addition to providing direct G/C services, the program will identify, develop and use less restrictive alternatives whenever possible; work with county and state officials and others to expand the availability of public G/C services throughout Oregon; and provide information and education on guardianship and best practices.

OPG services are provided by the Oregon Public Guardian, two Deputy Guardians, an Administrative Specialist, contractors, and volunteers. Deputy Guardians will carry caseloads of up to 20 protected persons. Caseloads may be organized by the region in which protected persons live or other common characteristics. OPG anticipates growing in the coming years based on identified need.
Given the program’s limited staff and resources, OPG will focus on those most in need of public G/C -- adults with complex medical and psychosocial problems for whom abuse, neglect or self-neglect and limited decisional abilities makes delivery of food, safe housing, medical and other care impractical without G/C assistance. Persons most often in need of G/C are individuals with age-related neurocognitive issues, including dementia; acute, serious and persistent mental health conditions; significant intellectual/developmental disabilities; and/or acquired traumatic brain injuries.

OPG is housed in the Office of the Long-Term Care Ombudsman (LTCO), an independent state agency that serves long-term and residential care facility residents through complaint investigation, resolution and advocacy. The mission of LTCO is to enhance the quality of life, improve the level of care, protect individual’s rights, and promote the dignity of each Oregonian residing in a long-term or residential care facility.

OPG is led by the Oregon Public Guardian. The program is operated in consultation with the Oregon Residential Ombudsman and Public Guardian Advisory Board and the Long-Term Care Ombudsman, with input from stakeholders and the public. In addition, OPG's staff play a key role in operating the program.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Assist the Public Guardian and Deputy Guardians in developing, administering, coordinating and implementing key administrative functions and duties for a statewide public guardianship and conservatorship program for adults.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) function.

<table>
<thead>
<tr>
<th>% of Time</th>
<th>N/R/NC</th>
<th>E/NE</th>
<th>DUTIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>N</td>
<td>E</td>
<td>Administrative and Clerical Support for the Administrative Assistant Specialist</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Performs clerical duties such as scanning, copying and filing.</td>
</tr>
<tr>
<td>25%</td>
<td>N</td>
<td>E</td>
<td>Maintenance of Case Management System</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Updates and maintains the electronic case management system for protected persons served by OPG which is known as EMS/SEM. Uploads data and documents into that electronic database.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- The EMS system contains legal, medical, human service documents and other confidential, person-specific information used by professionals and administrative staff to manage, document, review and account for OPG direct services.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Orients, trains and assists OPG staff in utilizing the case management system.</td>
</tr>
<tr>
<td>15%</td>
<td>N</td>
<td>E</td>
<td>Tracking of OPG Referrals and Intakes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Produces, maintains and updates spreadsheets in Excel of new referrals and intakes into OPG's program.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Assists in facilitating intakes for OPG services by requesting medical and other records necessary to assess OPG eligibility.</td>
</tr>
</tbody>
</table>

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.
- Utilizes Microsoft office software designed for Apple hardware. Prepares and produces documents in MS Word.

<table>
<thead>
<tr>
<th>15%</th>
<th>N</th>
<th>E</th>
<th>Assistance to Deputy Public Guardians</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Provides assistance to Deputy Public Guardians with errands such as shopping for clothing, gifts, or other items for protected persons.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Prepares TEDS (Travel Expense Detail Sheets) for Deputies.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Provides other assistance to Deputies as requested.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>15%</th>
<th>N</th>
<th>NE</th>
<th>Administrative Support</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Provides back-up telephone assistance for the OPG Program.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Provides basic accounting of client PIF funds and recording of receipts for purchases.</td>
</tr>
</tbody>
</table>

100%

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

On a daily to weekly basis, the administrative specialist will deal with difficult and stressful situations, including:
- Referred and protected persons who are confused, disoriented, agitated, delusional, hostile and/or abusive.
- Disgruntled, uncooperative and exploitive family members and abusers of adults in service with OPG; and
- Professionals and care providers with different and competing or conflicting interests and needs.

Position requires some travel to assist deputy public guardians in serving protected persons, including up to several local trips a week; and occasional travel to other locations in the Willamette Valley and Portland metro area. Travel in inclement weather may be necessary.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

- Oregon Revised Statutes (Chapter 125) and rules on guardianships, conservatorships, and procedures in protective proceedings
- OPG rules, policies and procedures (upon completion and adoption)
- Standards of Practice, Fourth edition (2013), National Guardianship Association
- Mental Health Law in Oregon, Fourth edition (2012), Disability Rights Oregon
- Legal Issues for Older Adults manual (2012), Oregon State Bar
- Elder Law in Oregon handbook (2011), Legal Aid Services of Oregon and Lane County Legal Aid and Advocacy Center

b. How are these guidelines used?

To inform, guide and direct the work of the Administrative Specialist.

SECTION 6. WORK CONTACTS
With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

<table>
<thead>
<tr>
<th>Who Contacted</th>
<th>How</th>
<th>Purpose</th>
<th>How Often?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health, human services and legal professionals, including staff of state and local Adult Protective Services programs, medical hospitals, long-term care facilities, mental health programs, and rehabilitative programs</td>
<td>Email, phone, fax, in-person, mail</td>
<td>Obtain intake information and assist in processing referrals and intakes.</td>
<td>Daily</td>
</tr>
<tr>
<td>Referred individuals, protected persons and family members, friends and associates of referred individuals and protected persons</td>
<td>Email, phone, fax, in-person, mail</td>
<td>Obtain intake information and assist in processing referrals and intakes.</td>
<td>Daily</td>
</tr>
<tr>
<td>Deputy Public Guardians</td>
<td>Email, phone, in-person, fax, mail, legal documents</td>
<td>Assist in clerical functions, errands, shopping and administrative tasks. Provide technical and other support and assistance to off-site Deputy Public Guardians.</td>
<td>Daily</td>
</tr>
<tr>
<td>Oregon Public Guardian</td>
<td>Email, phone, in-person, legal documents</td>
<td>Provide clerical and back-up administrative assistance to the Oregon Public Guardian.</td>
<td>Daily</td>
</tr>
<tr>
<td>Eligibility workers, case managers, social workers and other staff of county, state and federal and contract entitlement and service programs</td>
<td>Email, phone, in-person, fax, mail</td>
<td>Obtain information for processing intakes and referrals.</td>
<td>Daily</td>
</tr>
<tr>
<td>Oregon District/Probate Courts</td>
<td>Telephone, email, fax, legal documents</td>
<td>Obtain/provide information. Assist with coordination, submission and tracking of guardianship and conservator legal documents.</td>
<td>Weekly</td>
</tr>
</tbody>
</table>

**Note:** If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.

**SECTION 7. POSITION RELATED DECISION MAKING**

**Describe the typical decisions of this position. Explain the direct effect of these decisions.**

Prioritizes large number of tasks to accomplish program business and delegated G/C tasks, including tracking and calendaring systems. Failure to complete work in a timely and accurate manner may put protected persons at risk of harm; result in loss of real property and personal possessions; prevent or limit delivery of needed and essential health, human other services; and result in denial of fundamental civil rights. In addition, failure may violate Oregon law and/or court orders. In addition to the harm that might be caused to a protected person, poor decisions are likely to diminish the program’s reputation and credibility, and expose the program and state to legal action.
### SECTION 8. REVIEW OF WORK

#### Who reviews the work of the position?

<table>
<thead>
<tr>
<th>Classification Title</th>
<th>Position Number</th>
<th>How</th>
<th>How Often</th>
<th>Purpose of Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Public Guardian</td>
<td></td>
<td>Informal and formal meetings</td>
<td>Weekly or more often</td>
<td>Assign, review and prioritize work as needed</td>
</tr>
<tr>
<td>Oregon Public Guardian</td>
<td></td>
<td>Address specific issues as needed and in real time</td>
<td>Informal coaching, conferences or discussions occur as deemed necessary by the Public Guardian or requested by the Administrative Specialist 1</td>
<td>As needed/requested</td>
</tr>
<tr>
<td>Administrative Support Specialist 2</td>
<td></td>
<td>Informal meetings</td>
<td>Daily</td>
<td>Ensure incumbent has the knowledge and skills to do job and professional development is occurring as determined/agreed upon by the Oregon Public Guardian</td>
</tr>
<tr>
<td>Administrative Support Specialist 2</td>
<td></td>
<td>Weekly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Oregon Public Guardian</td>
<td></td>
<td>Performance review</td>
<td>3, 6, 12 months and annually thereafter</td>
<td>Work is reviewed for competency, accuracy, timeliness and conformance with applicable Oregon law, rules and OPG rules policies and procedures</td>
</tr>
</tbody>
</table>

**Note:** If additional rows of the below table are needed, place curser at end of a row (outside table) and hit “Enter”. 
SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

b. Which of the following activities does this position do?
   - [ ] Plan work
   - [ ] Assigns work
   - [ ] Approves work
   - [ ] Responds to grievances
   - [ ] Disciplines and rewards
   - [ ] Coordinates schedules
   - [ ] Hires and discharges
   - [ ] Recommends hiring
   - [ ] Gives input for performance evaluations
   - [ ] Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

Employment in this position is contingent upon:

- The completion and outcome of a FBI criminal records check, which may require fingerprints. Any history of criminal activity will be reviewed and could result in the withdrawal of an employment offer or termination of employment.
- The completion of a credit check that shows no history of bankruptcy and the ability to be bonded.
- Possession of and maintenance of a current valid driver’s license to drive issued by the state of residence or be able to provide an acceptable, alternate form of transportation. A DMV check will be conducted to verify a clean driving record.

The administrative specialist is expected to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts; contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. Working in a team-oriented environment requires participative decision-making and cooperative interactions among staff and management. The specialist is to be aware of affirmative action and OLTCO’s diversity strategies and goals.

The following attributes are highly desired. Candidates possessing them will be given greater consideration.

- Working knowledge of legal terminology, procedures and processes.
- Experience with and/or the ability to learn the use of an electronic case management system.
- Strong skills in MS Office software, including Word and Excel. Ability to work with a MAC system and/or willingness to learn.
- Strong written and oral communication skills, including English usage, spelling, punctuation, and grammar.
- Strong analytical and organizational abilities with attention to detail.
- Proficiency in basic math, budgeting, bookkeeping, and reporting.
- Excellent attendance and willingness and ability to be consistently punctual.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

<table>
<thead>
<tr>
<th>Operating Area</th>
<th>Biennial Amount ($00000.00)</th>
<th>Fund Type</th>
</tr>
</thead>
</table>

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.

DAS Form – 2006
SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

__________________________  ________________________  ________________________
Employee Signature          Date                        Supervisor Signature          Date

____________________________  ________________________
Appointing Authority Signature          Date