STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: **3/25/25**

This position is:
☒ Classified
☐ Unclassified
☐ Executive Service
☐ Mgmt. Svc – Supervisory
☐ Mgmt. Svc – Managerial
☐ Mgmt. Svc - Confidential

Agency: Oregon Department of Veterans' Affairs

Facility: Facility Services

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	Administrative Specialist 1	**b.** Classification No:	C0107
c. Working Title:	Trust Officer Assistant	**d.** PPDB No/WD ID:	0010.045
e. Section Title:	AVS, Conservatorship	**f.** Agency No:	27400
g. Employee Name:	Vacant	**h.** Budget Auth No:	1332630
i. Supervisor Name:	Cristina Boswell	**j.** Repr. Code:	OAS
k. Work Location (City – County):	Salem - Marion		

l. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

m. FLSA: ☐ Exempt ☒ Non-Exempt

If Exempt: ☐ Executive/Supervisory ☐ Administrative ☐ Professional ☐ Computer

n. Eligible for Overtime: ☒ 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 AVS Division consists of four programs to assist veterans and their families: 1) the two Oregon Veteran Homes – certified long-term care health facilities in The Dalles and Lebanon (the Homes); and 2) the Conservatorship Program providing professional fiduciaries to manage the financial affairs and property of protected veterans and their families; 3) Aging Veteran Outreach – working with Aging & Disability Resources Centers (ADRC's) around Oregon to educate staff and locate veterans who may be in need of assistance, and to complete claims for USDVA benefits for currently in either one of the Veterans' Homes or the Conservatorship/ Rep Payee programs, and 4) Volunteer program – to train and coordinate volunteer activity around the state in order to better serve the Oregon veteran population at large.

The Oregon Veteran Homes are Medicare and Medicaid certified and licensed health facilities providing skilled nursing, Alzheimer's/memory-related and rehabilitative care to veterans, their spouses and parents who had a child die while serving in the United States Armed Forces. The Oregon Veteran Homes are owned by the Oregon Department of Veterans' Affairs; the agency hires a contractor for the day-to-day operation of the facility. As a Medicare and Medicaid certified home, the relationship with the Oregon Health Authority is an important partner for the long-term and short-term care placement of veterans in need of care, along with the Federal VA for cost of care daily per diem for veteran residents. The state enabling statute is ORS 408.360.

The Fiduciary Program serves veterans, their surviving spouses, minor children or helpless adult children of veterans, and dependent parents in managing their financial affairs and property while helping ease the burdens often associated with paying bills, collecting funds on debts owed to the veteran, corresponding with creditors, buying or selling real-estate, or other investments. The professional fiduciaries work closely with interested family members in planning for the welfare and best interest of the veteran, their spouse or dependent. Veterans and other eligible family members are referred by the courts and the Federal VA for professional fiduciary services; the program works with the courts, Federal VA, attorneys, and other interested parties regarding the interests of the protected persons. The state enabling statutes are ORS 406.050 and 113.085.

The AVS Outreach Coordinator works with state, local government, and federal agencies, and in developing a plan to evaluate and assess the needs of aging Oregon veterans, identifying more aging veterans, submitting accurate claims for benefits, drawing down significant federal funds, coordinating and leveraging existing and new partners, and investing in early preventative strategies that will reduce expensive back-end safety net services.

The Veteran Volunteer Coordinator works with the general public to establish, train, and maintain the agency's volunteer program. The Veteran Volunteer Coordinator works with state, local, and federal agencies, and develops a plan to identify Oregon veterans in need of assistance and train volunteers to provide services.

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 Trust Officer to carry out the Director's obligation as conservator. After budgets are in place, they pay routine bills within budgeted guidelines. They also respond to simple requests for funds from and for protected persons. They work with medical providers, merchants, utility companies, government agencies, and other community resources to ensure that obligations are met and benefits are received.

Create and foster an environment where everyone has access and opportunity to thrive.*

Promote a positive and equitable work environment that enables all employees to contribute to their fullest potential free from intimidation, harassment and/or discrimination and are treated with dignity and respect. Create a culture where people from all backgrounds feel encouraged to express their ideas and perspectives.

Recognize and promote the value of individual and cultural differences–embracing each other's intrinsic value and uniqueness including race, age, ethnicity, religion, sexual orientation, physical ability, veteran status, and/or other aspects of social identity.

Promote and support the value the agency places on EEO, AA, Diversity, Equity, Inclusion, Belonging, (DEI_B) and Cultural Competency principles through individual actions, integration in work processes, and interactions with employees, job applicants, partners, and veterans.

*From: Enterprise Values and Competencies for Managers

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.

% of Time	N/R/NC	E/NE	DUTIES

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

		E	**Essential Job Expectation:** The employee shall comply with all federal, state and local laws, regulations, executive orders and ordinances. The employee expressly agrees to comply with ODVA business privacy practices to ensure the privacy of ODVA client information, which includes but is not limited to, compliance with Title II, Subtitle F of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) **Affirmative Action/Equal Employment Opportunity:** The employee is responsible for understanding and promoting the agency's affirmative action policy, goals, and objectives and the Governor's and Director's commitment to Diversity, Equity, and Inclusion. The employee is responsible for assuring a harassment-free work environment by setting an example with their own conduct, and by being alert to possible incidents of harassment. The employee is responsible for fostering and promoting a diverse environment and for taking prompt action in instances of non-compliance with the agencies affirmative action policy.
40%	R	E	Client Support: • Facilitate online orders by handling phone inquiries, consulting with relevant authorities, obtaining necessary authorization, and following up with the protected individual to confirm approval or denial. Process transactions using a corporate credit card and request reimbursement. • Work with agencies such as the DMV, Social Security Administration, and Oregon Vital Records to obtain identification documents, including ID cards, Social Security cards, and birth certificates. Gather required documentation to verify conservatorship and the protected person's identity. • Request updated conservatorship letters for annual accountings, communicate with credit bureaus, and issue credit letters as needed. • There's a possibility clients may be pursued by debt collectors. Upon receiving these letters, it is essential for TOA's to respond to debt collection notices by informing collectors of the conservatorship status. • Arrange transportation and schedule appointments for protected individuals. • Reach out to utility providers, particularly telephone companies, regarding any late fees on invoices that may have arisen due to delayed mail. Engaging with phone companies can be challenging; often, need to have the protected person on the line to authorize discussion with utility provider. • Oversee home repair projects which involves contacting various companies to solicit bids for necessary repairs or services. In certain instances, this may include visiting the property while contractors are present to ensure effective communication and oversight. • Organize vacations, estimate expenses, and book hotels, flights, and entertainment.

			• Gather supporting documents for annual accountings and VA reports. Assist Trust Officers in locating information required for reporting. • Update Kelley Blue Book values annually and enter data into the AS400 system. Request investment statements as necessary. • Address vehicle-related concerns such as lost car keys, emergency fund management, last-minute transportation, and urgent client purchases. • Managing emergency funds • Facilitating purchases for clients, coordinating overnight shipping of checks or items as needed • Addressing overdue payments and billing discrepancies, such as missing bills or those sent to incorrect recipients or addresses • Handling disruptions in services, including phone and utility services. • Review medical bills to determine necessary actions based on AS400 records and insurance policies. Ensure proper billing and payment through the appropriate channels. • Process bill payments and money requests by verifying cash account balances and transaction codes. Use judgment to approve certain payments based on budget, cash flow, and prior expenditures. • Process incoming mail, award letters, assessment notices, EOBs, Medicare/VA ID cards, and other documents. Review, update files, distribute to the protected person, or escalate to the Trust Officer as needed. • Conduct telephone inquiries to obtain information and arrange billing procedures.
30%	NC	E	• Respond to telephone calls from protected persons, family, courts, or other interested parties by giving information requested (if not considered confidential), relaying information from trust officer, or explaining procedures. If further assistance is needed, take messages and/or transfer calls to the trust officer.
10%	R	NE	• Meet with protected persons, family members or other interested parties both in office and in the field to provide/receive information, assist in budget setup/revision, and/or evaluate living situation/conditions to ensure protected persons are safeguarded.
8%	R	NE	• Compose original letters for own signature, trust officer signature, or conservatorship manager signature. • Compose and type memos and memos-to-file. Produce standard pattern letters by use of glossaries, macros, and template.
5%	NC	E	Establish new case files: • Gather background information on protected person and his/her estate such as income, insurance, property, relatives, debts, etc. • Make necessary contacts, obtain required legal documents and/or necessary vital records, and notify other agencies and persons of appointment of ODVA as conservator. • Complete forms for benefits, payee changes, and direct deposit. • Track deadlines as set forth in statutes listed in section 5 of the position description to ensure compliance with laws.

			• Gather information and prepare legal documents for inventory according to statutory requirements. • Prepare record keeping items for office use. • Record new information in file, especially updating all relevant AS400 screens and update other internal records. • Review eligibility requirements for federal, state, county and local benefits. Notify corresponding agencies of changes (e.g., notify SPD offices, VA, etc., when changes in protected persons' income affect benefits).
5%	R	E	• Respond to certain inquiries and/or requests made on Social Information Questionnaires and holiday funds requests, which are processed annually. • Review status of budget and personal expenditures, input data for check preparation, discuss certain requests with the trust officer, or give to the trust officer to process. • Record accounts receivable payments; refer delinquent payments to trust officer. • Review files to ensure they are in good order and become familiar with individual case activities. • Assist with writing procedures for tasks within the trust officer assistant's position description.
2%	NC	NE	• Determine transaction code, record, and route to Cashiers Unit incoming money (mostly checks) and, when necessary, record changes on Expected Income screen in AS400.
Ongoing			Promote the importance and value of a diverse, discrimination and harassment-free workplace. Respect diversity of opinions, ideas and cultural differences. Support and act to provide inclusive practices, outreach into communities of underrepresented people, and efforts to diversify the workforce. Understand and act on EEO, AA, Diversity and Cultural Competency principles, and the agency's Diversity, Equity, Inclusion, and Accessibility goals and objectives; integrate and center DEI into programs, operations, wellness practices, systems, policies, and procedures. Promote and foster a positive work environment within Agency programs concerning EEO, AA, DEIA, and Cultural Competencies by ensuring employees are aware and follow agency policies and procedures and address work-related issues and/or concerns immediately and take appropriate action. Attend and actively participate in DEIA-related training to provide leadership to staff by being aware of diversity, equity, and cultural issues. This also includes supporting employees to attend such programs for further professional development
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.

- Occasional encounters with hostile or verbally abusive clients.
- Intermittent overtime work.
- Ability to sit for extended periods (at computer monitors, document scanners, or desk).
- General office environment with extensive use of computer and phone technology for communication,
- Highly visible production environment with extensive use of information technology.
- Constant telephone and in-person requests for information.
- Requires dealing with numerous interruptions while working on highly technical information.
- Requires working with multiple priorities and meeting strict deadlines.
- Requires maintaining strict confidentiality of all agency files.
- Requires close attention to detail and complete accuracy combined with great efficiency.
- Requires working on a personal computer in a LAN environment and utilizing various software and database systems.
- Requires occasional travel.

Remote Work:
This position will maintain a combination of onsite and remote work or hybrid work schedule. Remote work is evaluated periodically to ensure business needs are being met and can be adjusted at any time. Please visit the state's Work Reimagined website for more information.

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, chapters 111-118, 124, 125, 406, and 408
- Oregon Administrative Rules: 274
- Title 38 United States Code
- Title 38 Code of Federal Regulations
- USDVA M21-1MR Part XI Fiduciary Program
- Title II, Subtitle F of the Health Insurance Portability and Accountability Act of 1996 (HIPAA)
- Uniform Trial Court Rules
- Social Security Administration Regulations
- State and Federal Tax Law
- Privacy Act
- Conservatorship manual/desk procedures

b. How are these guidelines used?

The guidelines are used to determine whether a protected person is eligible for a particular program or benefit, how application is made, how claims are processed, what and how records are kept, and what information can be released, to name a few. Certain guidelines are interpreted for care providers, medical providers, relatives, etc., who need assistance with processing claims, understanding this program's procedures, etc.

SECTION 6. WORK CONTACTS

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

Who Contacted	How	Purpose	How Often?

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

Clients	In person/verbal/written	Provide/request information regarding accounts and timelines	Daily
Agency personnel	Verbal/written	Work activities, resolve problems, giving or obtaining information, explain procedures/policies	Daily
Vendors	Verbal/written	Provide/request information, arrange services, terminate services	Daily
Relatives	In person/verbal/written	Provide/request information needed to perform duties	Weekly
Guardians	In person/verbal/written	Provide/request information needed to perform duties	Weekly
Care Facilities	In person/verbal/written	Provide/request information, arrange services, pay for services	Weekly
Federal, State, & County agencies	In person/verbal/written	Provide/request information, file claim forms, apply for benefits	Weekly
USDVA	Verbal/written	Request information, respond to inquiries	As needed
CVSO's/NSO's	Verbal/written	Request information regarding the claims and benefit status of protected persons	As needed
Heirs	Verbal/written	Provide/request information regarding deceased protected persons and timelines	As needed
Funeral Homes	Verbal/written	Request information regarding burial policies, closing accounts and billings	As needed

SECTION 7. POSITION RELATED DECISION MAKING

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

Decisions involve interpreting and applying regulations to an individual's circumstance, approving bills/money requests for check production, referrals, handling contacts with protected person and others, frequency and type of follow-up, search for information, effective use of time, and setting work priorities.

The effects of the decisions would be prudent handling of the protected person's money, needs being met, receipt of all benefits, pertinent information being available, trust officer kept informed, bills paid on time, and contacts with protected person and others being well received to keep open line of communication.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review

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

Business Operations Supervisor 2	0031.018	Verbal/written	Daily/as needed	Reviews files and work product as necessary to ensure compliance with established procedures.
Veterans Trust Officer	7214.006	Verbal/written	Daily/as needed	Reviews documents and forms before signing, and approves payment request to

				ensure accuracy and completeness

SECTION 9. OVERSIGHT FUNCTIONS THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? NA
How many employees are supervised through a subordinate supervisor? NA

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:

- Skill and knowledge in processing medical billings for insurance payment and/or private payment.
- Skill and knowledge with navigation of social or health service systems.
- Knowledge of government operated health insurance programs such as, Oregon Health Plan, Medicaid, VA, Champ VA, Tricare, etc.
- Skill working in a fast-paced environment with constantly changing priorities.
- Knowledge, skill and ability to prepare legal documents motions, requests, notices, affidavits, limited and general judgments, etc.
- Skills and ability to work within stringent legal deadlines, and to review documents for accuracy and completeness.
- Knowledge of legal terminology, systems and processes.
- Skill to complete complex work involving initiative and sound judgment.
- Skills and ability to work collaboratively in a team setting are necessary, including the willingness to communicate, share information, and generally contribute to the team's success.
- Excellent customer service and diplomacy skills and the ability to demonstrate initiative, sound judgment, decisiveness on an ongoing basis and prioritize tasks.
- Proficient knowledge, skills, and ability in computer keyboarding and Microsoft Office. Knowledge and use of the conservatorship applications on the AS400, and knowledge and use of the Internet for research purposes.
- Basic understanding of Standards Accounting Principles needed to review budgetary documents submitted by guardians and/or attorneys for accuracy and auditing purposes.
- This position is entrusted with the responsibility for managing protected persons' estates, and as such the person in it must be ethical, trustworthy, and above reproach.
- This position requires communicating effectively orally and in writing with a variety of people, answering questions and explaining information, policies, and decisions.

SPECIAL REQUIREMENTS:

- Must successfully pass a criminal history background check and fingerprint check through the LEDS and NCIC systems and driving record check through the DMV system. Must possess a valid driver's license and maintain an acceptable driving record.

- Must be able to pass certification exam and meet related criteria to become a National Certified Professional Guardian as required by ORS 125.240.
- Have no history of denial or revocation of a professional license that is directly related to the responsibilities of a professional fiduciary.

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

Operating Area	Biennial Amount ($00000.00)	Fund Type
NA		

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

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		

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.