



**STATE OF OREGON
POSITION DESCRIPTION**

Position Revised Date:
06/18/2025

This position is:

- ☒ Classified
☐ Unclassified
☐ Executive Service
☐ Mgmt. Svc – Supervisory
☐ Mgmt. Svc – Managerial
☐ Mgmt. Svc - Confidential

Agency: Oregon Department of Veterans' Affairs

Facility: Aging Veteran Services Division

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: <u>Administrative Specialist 2</u>	b. Classification No: <u>C0108</u>
c. Working Title: <u>Representative Payee</u>	d. PPDB No/WD ID: <u>0010.044</u>
e. Section Title: <u>AVS, Conservatorship</u>	f. Agency No: <u>27400</u>
g. Employee Name: <u>Vacant</u>	h. Budget Auth No: <u>1292390</u>
i. Supervisor Name: <u>Cristina Boswell</u>	j. Repr. Code: <u>OAS</u>
k. Work Location (City – County): <u>Salem - Marion</u>	
l. Position: <input checked="" type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year <input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
m. FLSA: <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt	If Exempt: <input type="checkbox"/> Executive/Supervisory <input type="checkbox"/> Administrative <input type="checkbox"/> Professional <input type="checkbox"/> Computer n. Eligible for Overtime: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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 Aging Veterans Division consists of four programs designed to assist veterans and their families: 1) Oregon Veteran Homes – Two state-certified long-term care health facilities in The Dalles and Lebanon (the Homes); 2) Conservatorship Program - provides professional fiduciaries to manage the financial affairs and property of protected veterans and their families; 3) Aging Veteran Outreach – Partners with Aging & Disability Resources Centers (ADRC's) around Oregon to educate staff and locate veterans who may be in need of assistance, and complete claims for USDVA benefits, particularly for those in the Veterans' Homes or enrolled in the Conservatorship/Rep Payee programs, and 4) Volunteer Program – Recruits, trains and coordinates volunteers statewide in order to better serve the Oregon veteran population at large.

The Oregon Veteran Homes are licensed health facilities certified by Medicare and Medicaid. They provide skilled nursing, Alzheimer's/memory-related and rehabilitative care to veterans, their spouses and parents of service members who died while serving in the United States Armed Forces. The Oregon Veteran Homes are owned by the Oregon Department of Veterans' Affairs, which contracts with a private provider for daily operations. ODVA partners closely with the Oregon Health Authority for long-term and short-term care placement of veterans in need, and with the Federal VA for per diem cost of care reimbursements for eligible veteran residents. The Homes operate under Oregon Revised Statute (ORS) 408.360.

The Fiduciary Program serves veterans, their surviving spouses, minor children or dependent adult children of veterans, and dependent parents by 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. Referrals typically come from the courts or the Federal VA. The program also works closely with the courts, Federal VA, attorneys, and other interested parties regarding the interests of the protected persons. The program operates under ORS 406.050 and ORS 113.085.

The AVS Outreach Coordinator works with state, local, and federal agencies, to evaluate and address the needs of Oregon's aging veteran population. This includes identifying at-risk veterans, assisting with claims for federal benefits, coordinating and leveraging new and existing partnerships. The program emphasizes early, preventative strategies to reduce reliance on high-cost safety net services.

The Veteran Volunteer Coordinator oversees the recruitment, training, and management of volunteers supporting veterans across Oregon. This role involves working with state, local, and federal agencies, to identify Oregon veterans in need and trains volunteers to provide meaningful assistance and support.

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:

The primary purpose of this position is to represent the Director of the Oregon Department of Veterans' Affairs as a fiduciary designee, serving Oregon veterans and, when necessary, their family members. The Representative Payee is responsible for managing clients' monthly income received from the U.S. Department of Veterans Affairs (USDVA) and/or Social Security Administration (SSA). Key responsibilities include determining and applying for benefits, collecting income, establishing budgets, arranging payments for care and other services. The Representative Payee monitors financial activities on behalf of the veteran client to ensure compliance with Federal and/or State laws, prevent abuse or fraud, and respond to monetary requests on the client's behalf. The Representative Payee works in collaboration with the USDVA, Social Security Administration, guardians, family members, social workers, and other community professionals to ensure that the veterans' financial needs are met within their available resources. The Representative Payee fulfills certain legal requirements including filing annual accountings with the appointing authority (US Department of Veterans Affairs (USDVA) or Social Security Administration (SSA)). The Representative Payee meets with clients, interested parties and other professionals as necessary to carry out the duties of the representative payee program. The Representative Payee reviews the client's eligibility for benefits programs such as veterans' assistance, Social Security, and Medicaid.

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	<p>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)</p> <p>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, Inclusion, and Accessibility. 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 an inclusive and equitable environment and for taking prompt action in instances of non-compliance with the agencies affirmative action policy.</p>
40%	N	E	<ul style="list-style-type: none"> Establishes and maintains procedures and controls necessary to administer the Representative Payee program on behalf of veteran clients; works with representatives from the USDVA and SSA to ensure adherence to program guidelines. Assists Conservatorship Manager in developing both long and short-term program goals. Identifies, establishes and updates individualized budgets based on each client’s financial needs and available resources; evaluates and monitors status of accounts. Reviews all billings and claims to determine validity; researches discrepancies, works with vendors to resolve billing issues, and ensures care or services provided are authorized and compliant with program standards Negotiates with involved parties to resolve problems; approves or denies claims against estates for expenditures of funds. Correspond daily with veteran clients to negotiate requests for additional funds or address debts not included in the established budget. Communicates and coordinates with the veteran and/or vendors to ensure proper billing procedures, and timely payment of debts.

20%	N	NE	<ul style="list-style-type: none"> • Arranges necessary care for veterans through institutions, nursing homes, foster homes, or private individuals. • Arranges payment for medical care, personal needs, and other essential items after evaluating the veterans' ability to pay. • Applies on behalf of the Director of Veterans' Affairs to serve as payee for USDVA, SSA, and Civil Service annuities.
20%	N	NE	<ul style="list-style-type: none"> • Reviews and submits required accountings to the appointing authority in accordance with statutory deadlines. • Prepares written responses to inquiries from the USDVA and SSA. • Explains Representative Payee Program and its statutory authority to internal and external parties. Responds to inquiries for information from clients and their families, legal entities, guardians, social workers, local government agencies, banking institutions, medical providers and other stakeholders about the program and operations, explaining laws, rules, policies and procedures to determine an appropriate course of action, resolving issues or achieving compliance. • Provides internal staff with information and guidance regarding the program, answering questions and providing advice or direction.
20%	N	NE	<ul style="list-style-type: none"> • Determines veteran's assets, resources, and liabilities to assess financial standing. • Evaluates whether a conservatorship may be needed or beneficial , making recommendations accordingly. • Applies for public assistance on behalf of clients when an individual's personal resources are inadequate to meet basic needs. • Conducts client visits as needed to determine if all financial and other needs are being addressed. • Prepares files for closing, ensuring compliance with post-closing legal requirements.
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.

Essential job functions required of this position include:

- Frequent encounters with hostile or verbally abusive clients.
- Intermittent exposure to unsanitary or potentially hazardous environmental conditions visiting veterans.
- Intermittent overtime work may be required to meet workload demands or deadlines.
- 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 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 software/database systems.
- Requires occasional travel. Must have a valid driver's license and a good driving record, if not, must be able to provide an acceptable alternate method of transportation.

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 and Oregon Administrative Rules
- Title 38 United States Code and 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
- Agency and Program policies and procedures
- State law and policies governing state agency operations
- Federal, State, and local laws and ordinances
- National Guardianship Association

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 cursor at end of a row (outside table) and hit "Enter".			
Veteran	In person/verbal/written	Provide/request information regarding accounts and timelines, respond to requests for funds	Daily
Agency personnel	Verbal/written	Work activities, resolve problems, giving or obtaining information, explain procedures/policies	Daily
Vendors	In person/verbal/written	Arrange payment for/obtain services and goods	As needed
Relatives/friends	In person/verbal/written	Provide/request information needed to perform duties	Weekly
Guardians/Case Managers	In person/verbal/written	Provide/request information needed to perform duties, monitor client's mental and physical health and provide for needs.	As needed

Care Facilities/landlords	In person/verbal/written	Provide/request information, arrange services, pay for services, monitor client's mental and physical health and provide for needs.	As needed
Federal, State, & County agencies	In person/verbal/written	Provide/request information, file claim forms, apply for benefits	As needed
USDVA	Verbal/written	Request information, respond to inquiries, file EVR's	As needed
VSO's/CVSO's	Verbal/written	Request information regarding the claims and benefit status of protected persons	As needed
Attorneys	In person/verbal/written	Provide/request information regarding accounts and timelines, to discuss need for guardianship, or petitions for special purposes.	As needed
County/Circuit Courts	In person/verbal/written	Send/request information as required by law, or as needed request in the event the veteran has a court appointed guardian	As needed
Heirs	Verbal/written	Provide/request information regarding deceased veterans as required to close cases	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.

The person in this position interprets Federal and/or State laws, rules, policies and procedures to determine client activities under the program. The incumbent in this position must evaluate the individual clients needs and decide how a veteran's income and resources will be allocated toward regular and non-regular expenses. A Representative Payee must decide whether or not to authorize money for special requests or claims against an estate and when it is appropriate to apply for a particular benefit and appeal an unfavorable decision by another agency.

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

All decisions made by a Representative Payee affect a veteran's resource level, the course of his/her financial future, and the veteran's quality of life.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
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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, USDVA personnel, SSA personnel, guardians		Review of accountings	Annually	Ensure funds are expended legally and appropriately

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?
- | | |
|--|---|
| <input type="checkbox"/> Plan work | <input type="checkbox"/> Coordinates schedules |
| <input type="checkbox"/> Assigns work | <input type="checkbox"/> Hires and discharges |
| <input type="checkbox"/> Approves work | <input type="checkbox"/> Recommends hiring |
| <input type="checkbox"/> Responds to grievances | <input type="checkbox"/> Gives input for performance evaluations |
| <input type="checkbox"/> Disciplines and rewards | <input type="checkbox"/> 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 Medicaid, Oregon Health Plan, Medicaid, VA, Champ VA, Tricare, etc.
- Skill working in a fast-paced environment with constantly changing priorities.
- Skill and ability to work within stringent deadlines, and to review documents for accuracy and completeness.
- Skill to complete complex work involving initiative and sound judgment.
- Skill and ability to work collaboratively in a team setting are necessary, including the willingness to communicate, and share information.
- 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 for accuracy and auditing purposes.
- This position is entrusted with the responsibility for managing veterans' monthly income, 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 professional fiduciary /National Certified Professional Guardian as required by ORS 125.240(1)(a).

Fiduciary Standards Compliance: Maintain required certification as a National Certified Guardian or National Master Guardian. Continuously notify and update ODVA of all personal bankruptcy filings, both past and present, to ensure compliance with ORS chapter 125 notice requirements for fiduciaries.

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type
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Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

NA		
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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

Next Level Class Title	<div style="border: 1px solid black; padding: 5px;">Business Operations Manager 1</div>	Class Titles of those directly supervised by employee and the number of employees in each class title
Supervisor's Class Title	<div style="border: 1px solid black; padding: 5px;">Business Operations Supervisor 2</div>	
Employee's Class Title	<div style="border: 1px solid black; padding: 5px;">Administrative Specialist 2</div>	<div style="border: 1px solid black; height: 30px;"></div>
Class Titles of other jobs reporting to the same supervisor and the number of employees in each class title	<div style="border: 1px solid black; padding: 5px;">Administrative Specialist 1 (2)</div>	<div style="border: 1px solid black; height: 30px;"></div>
	<div style="border: 1px solid black; padding: 5px;">Administrative Specialist 2 (1)</div>	<div style="border: 1px solid black; height: 30px;"></div>
	<div style="border: 1px solid black; padding: 5px;">Veterans Trust Officer (3)</div>	<div style="border: 1px solid black; height: 30px;"></div>
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