# Money Management Team Lead

**Status: Non-Exempt**

## Definition

Under the direction of the Chief Financial Officer, the Money Management Team Lead is responsible for implementing MAS’ money management services. Works with the CFO to determine and implement strategies to strengthen and expand money management services. Provides professional money management services to clients residing in Missoula County by performing moderately complex accounting and financial duties.

## Essential Duties

*(The following are intended to illustrate typical duties; they are not meant to be all inclusive or restrictive.)*

1. Supports agency’s mission and philosophy and fully participates in agency’s goals and objectives, including, but not limited to, being available to work occasional evening and/or weekend events.
2. Assists in the development and implementation of a Money Management program: Bill Payer, Paying Agent, Representative Payee, and Debt Management.
3. Assists in developing orientation and training materials for Money Management staff. Works as lead in providing training to new employees and volunteers.
4. Provides customer service as needed: handles non-routine complaints, arbitrates minor disputes, and resolves minor grievances of program staff, clients, and referral sources (Social Security Administration, Medicaid waiver, etc.); oversees the evaluation of client satisfaction.
5. Assists in developing, planning, and coordinating the Money Management activities to ensure goals and objectives are accomplished within the prescribed time frame and program requirements.
6. Confers regularly with the Chief Financial Officer to further develop and implement Money Management policy and to continuously improve program operations. Ensures compliance with regulatory guidelines, standards, and rules.
7. Serves as a Money Management Program Specialists as needed.
8. Assists in the design of control systems and coordinates the progress of all additional areas of the Money Management Program.
9. Provides intake for the Money Management program. This includes successfully screening and enrolling client, coordinating with the Social Security Administration, Medicaid waiver team, Veterans Affairs staff, and other referral resources. Makes the initial contact with the client and/or his/her family or representative.
10. Examines invoices, prior to payment, to determine propriety of expenditure and by comparing invoice price to contract price, units invoiced to units received, and by charging the appropriate account. Prepares and issues checks.
11. Monthly reconciliation of client accounts to bank records.
12. Makes referrals to other departments (Resources, Care Management, Nutrition) to provide additional assistance to clients while working in a team environment to meet the social and financial needs of the client.
13. Responds to requests for account status and payment information.
14. Bills Money Management and/or other program clients as required.
15. Informs MAS Resource Center Manager on Money Management issues and known fraud scams in the area, if any.
16. May schedule, assign and monitor the work of a team or individuals.
17. Participates in public relations and other outreach activities, including but not limited to: Presenting information to individuals, groups, and organizations. Establishing and maintaining productive working relationships with individuals, organizations, and groups whose activities may benefit the program and its objectives. Attending or conducting meetings which support achievement of the money management program’s goals and objectives.
18. Models positive leadership: Fosters positive teamwork and collaboration. Cultivates open communication. Acts as a catalyst for change and continuous improvement. Encourages and empowers others to achieve.
19. Performs duties as assigned.

## Supervision Received

Works under the general direction of the Chief Financial Officer.

## Supervision Exercised

May act as a team leader for special projects, which may include paid and volunteer workers.

## Working Relationships

The work entails interacting with varied MAS staff as well as vendors, clients, and case management teams.

**Physical/Mental Demands & Working Conditions**

Requires moderate physical effort, moving between 5 and 25 pounds, on an intermittent basis (less than 15% of the time). While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is occasionally required to stand and walk. Requires high attention to detail or deadlines on a continuous basis (over 70% of the time).

## Employee works in office environment free of excessive noise or other disagreeable elements, where temperature is regulated with less than 10-degree Fahrenheit variation. Travel within Missoula County is required frequently. Travel outside of Missoula may be required. Use of a personal vehicle required. Must possess a valid driver’s license and maintain vehicle insurance as required by MT law.

## Qualifications

*Knowledge:* Considerable knowledge of Social Security Representative Payee Services. Demonstrated knowledge of accounting principles and practices. Working knowledge of patient billing systems, particularly third-party billing including Medicaid. Above average knowledge of basic arithmetic. General knowledge of the social dynamics of the aging process.

*Skill:* Above-average skill in gathering, organizing, and interpreting data. Ability to handle a variety of moderately complex bookkeeping tasks in preparing, recording, and examining fiscal records. Proficient in the operation of a personal computer and common computer applications such as Microsoft Office Suite and Quick Books. Average skill in effective communication and interpersonal relationships. Above-average skill in the use of basic mathematics to solve problems. Proven skill in simple to moderately difficult negotiations. Above average public relations and customer service skills.

*Ability:* Ability to visualize details at a close range. Ability to analyze, compare and interpret facts and figures quickly. Ability to work within a team concept. Ability to follow a prescribed approach. Ability to successfully interact with a wide range of individuals and organizations of diverse backgrounds and viewpoints. Ability to work with minimal supervision.

*Education and Experience:* The preferred knowledge, skills and abilities described above are typically acquired through a relevant bachelor’s degree (e.g. finance, public administration, business administration, management) and three years (3) of related work experience *OR*a suitable combination of education and experience. Volunteer work may be considered in evaluating work experience.

**Competency**

*Professionalism:* Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.

*Quality:* Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.

*Quantity:* Meets productivity standards; Completes work in timely manner; Strives to increase productivity; Works efficiently.

*Safety and Security:* Observes safety and security procedures; Determines appropriate action beyond guidelines. Reports potentially unsafe conditions; Uses equipment and materials properly.

**Personal Attributes**

It is essential for this position to be open-minded and flexible with regard to work to be performed. This position will require a great amount of self-motivation, self-direction, and discipline. Must be able to work and perform under moderate to high pressure. A high level of organizational skill is necessary in receiving and prioritizing clients. Must be willing to assist other co-workers as needed without being directed to do so. Teamwork and flexibility are essential to this position and to the company.

It is essential that the person in this position understand the policies and procedures as set out by management, and work as a team member for the good of the company. This position will be cross trained in other areas of the support staff duties.

**I understand that this job description is presented as a matter of information only and nothing contained in this job description shall be construed as an agreement or contract of employment between Missoula Aging Services and the employee.**

**I acknowledge receipt of job description and have read and understand the duties outlined above.**

**Signature of Employee:**

**Date:**