Job Description

Title: Beneficiary Specialist  Date of Issue: January 2015

POSITION SUMMARY:
This position is responsible for working directly with WisPACT’s beneficiaries and their advisors, family members and attorneys. This position oversees the distribution of funds from WisPACT trusts in accordance with legal guidelines. This position is responsible for evaluating distribution requests for appropriateness and compliance with public benefits eligibility requirements.

CORE COMPETENCIES

Confidentiality—regarding WisPACT beneficiary and business information

Respect – for all people we interact with

Professionalism in all our interactions

Business ethics

Teamwork – and open communication

Continuous improvement – and willingness to change

JOB SPECIFIC QUALIFICATIONS

- Minimum of bachelor's degree in an area related to human services such as social work or a related field.
- Minimum of 3-5 years professional experience working in a human services agency or a position working with disabled individuals or the elderly. Prior experience acting in a fiduciary capacity preferred.
- Working knowledge of the needs of WisPACT’s client population and the public policy issues that affect them.
- Ability to understand and adhere to complex legal and regulatory requirements and interpret these for beneficiaries.
- Ability to understand and provide customer service while maintaining and upholding the provisions of the Master Trust.
- Strong written communication.
- Strong interpersonal communications, including the ability to communicate with a wide variety of individuals.
- Strong organizational skills.
Ability to manage multiple clients simultaneously, prioritizing tasks as needed.
Ability to use standard office software products, including Microsoft Office Suite.
Basic knowledge of human services in Wisconsin and other relevant resources to make referrals as necessary to beneficiaries.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Assist new clients and their advisors in establishing new WisPACT trust accounts.

- Explain WisPACT’s procedures and requirements to new beneficiaries, families and advisors as requested. Make initial welcome call to explain services and introduce staff.
- Work collaboratively with Office Manager to ensure that an official file is set up for each new beneficiary—both hard copy and electronic. Provide guidance to Office Manager or Office Assistant regarding the organization of documents in the appropriate section within the file.
- Assist other staff as necessary/requested to obtain missing documents. Communicate as requested with beneficiary or legal advisor to follow up on missing or incomplete documents.
- Follow-up with appropriate government agencies to obtain information needed for the files.

Process Distribution Requests in accordance with applicable rules and internal guidelines.

- Review requests received from beneficiaries on a daily basis.
- Educate case managers and other agencies working with the beneficiary about WisPACT’s services.
- Ensure that appropriate documentation is provided.
- Responsible for making determinations as to whether each distribution is within legal and agency guidelines. Work with Trust Advisor and/or Executive Director if additional legal research is needed prior to reaching a decision.
- Communicate with beneficiaries and advisors to explain WisPACT procedures and the status of all requests submitted.
- Answer questions from beneficiaries regarding distribution requests and communicate as necessary until the process is completed.
- Ensure that appropriate records are kept regarding each account and distribution request.
- Provide advice about the consequences of distributions while respecting the beneficiary’s wishes as much as possible.
Related projects as assigned

- Work collaboratively with WisPACT staff and Board of Directors to streamline and improve services provided to beneficiaries and other stakeholders.
- Identify policy areas needing legal research and refer these to Trust Advisor and/or Executive Director as appropriate.
- Work collaboratively with Marketing and Outreach Specialist to ensure that new information is regularly available for the newsletter, website and other publications.

OTHER FUNCTIONS AND RESPONSIBILITIES

The incumbent may be required to work additional hours during times of heavy workload including evenings and weekends. The incumbent must remain flexible year round to work extra hours as needed to address client needs.

WisPACT places a high level of importance on teamwork and a willingness to perform duties which may not be included in this Job Description

PHYSICAL REQUIREMENTS

Work is performed in a standard office environment.
- Ability to use a keyboard extensively required.
- Ability to sit, stand, bend, lift, see and hear required.
- Ability to sit for long periods of time
- Occasional bending, lifting and stretching required.
- Manual dexterity required for use of calculator and computer keyboard.
- Ability to lift up to 50 lbs on an occasional basis.
- Ability to speak on the telephone in order to conduct business required.

SUPERVISED BY: Beneficiary Specialist Manager

SUPERVISES: This position does not supervise subordinate staff.

FLSA STATUS: Exempt