

Catholic Family Service

Position Description

NAME:		DATE: February 2018
JOB TITLE:	Guardianship Program Aide	
SUPERVISOR:	Program Manager	
STATUS:	Part-time, hourly, non-exempt (up to 19 hours per week)	

I. GENERAL DESCRIPTION

The Guardianship Program Aide assists with general duties of the Guardianship Program of Catholic Family Service and assists with financial transactions, working to maintain accurate accounts for Catholic Family Service and for the clients or wards under the Guardianship Program.

II. RESPONSIBILITIES / DUTIES

A. General Duties

- Sort in-coming mail and assure prompt mailing of communication
- Perform other offices tasks, including answering the telephone, take and relay messages, filing
- Attend office meetings
- As directed by office manager, assist with other office responsibilities

B. Financial Responsibilities

- Submit to bookkeeper bills and scheduled payment lists
- Process all payments and transfer funds from wards' accounts to our main account.
- For each client, maintain proper documentation, establish & monitor bonds and maintain a guardianship account
- Assure the proper financial transactions for banks, social security, pensions and other funding sources
- For each client, maintain an inventory and, as needed, submit the inventory to the Probate Court and Guardian
- Assist Attorney as needed
- Submit and verify insurance billings, see that office manager receives payment
- Maintain appropriate forms, including asset verification

III. WORKING CONDITIONS

- This position requires being present in an office setting while performing secretarial and general accounting tasks, answering telephones and other office tasks.

- The physical demands of this position include the ability to bend and lift up to 25 pounds, using safety precautions.
- While performing the duties of this job, the employee is required to stand, walk, bend, reach, sit, listen, communicate clearly, and use repetitive motion of the hands/wrists and feet.

IV. QUALIFICATIONS & SKILLS

- Knowledge and positive support of Catholic Family Service and of its Guardianship Program
- Understanding and ability to provide hospitality, contributing to a welcoming atmosphere for colleagues, clients and those who work in association with the Program
- The ability to work for and with a number of people
- Proven work experience as a general accountant and secretary
- Familiarity with office organization and optimization techniques
- Proficient in MS Office, Excel and QuickBooks
- Excellent verbal and written communications skills
- Ability to maintain confidentiality
- Ability to multi-task and manage time efficiently
- High School diploma with at least three years of accounting &/or banking related experience
- Valid Driver’s License is required
- Regular, reliable attendance is required

NOTE: This description is intended to indicate the kinds of tasks and levels of difficulty that will be required by the position. The use of a particular expression describing duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

JOB DESCRIPTION REVIEW AND ACCEPTANCE:

I understand this job description and its requirements. I understand that this is not an exclusive list of the job functions and that I am expected to complete all duties as assigned. I understand the job functions may be altered by management without notice. I understand that this job description in no way constitutes an employment agreement and that I am an at-will employee.

Signature of Employee

Date

Signature of Supervisor

Date