

[WEB] Submit a Job

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To: SWO <SWO@baylor.edu>



A new job has been submitted.

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Registration Information

Order No.	3963234
Agency Name	The Senior Source
Job Title	Financial Case Manager
Job Description (including hours and responsibilities)	<p>Full time non-exempt • Determines program eligibility by assessing clients for service needs and aptitude for money management services, whether the service is representative payee or voluntary case management, and assists in resolving placement delays. • Evaluates the progress of program clients through regular in-person contact once placed and matched with a volunteer, monitors the placement relationship reporting volunteer successes and concerns to the Senior Financial Case Manager. • Coordinates timely bill payment, check writing and banking on behalf of clients including fostering the relationship with the Center bank. • Adheres to a quality control plan for the Representative Payee Program ensuring compliance with Social Security, money management program standards, Center, and agency guidelines. • Assists the Senior Financial Case Manager and Center leadership with volunteer training and meetings. • Leads and participates in project initiatives as a member of a cross-functional team inside and outside the scope of expertise and experience, including representing the team on community boards or committees. • Documents all required and necessary information and interactions timely and accurately in online client and document management systems. • Performs other duties as assigned by the Senior Financial Case Manager or Center and agency leadership.</p>
Job Location	Dallas, TX
Qualifications	<p>• Candidates should have a Bachelor's degree with three to five years of any combination of training, education and experience that is equivalent to client service delivery, social work, financial services or financial coaching listed above and that provides the required knowledge and abilities. • Excellent verbal, written and communication skills. • Ability to thrive in a fast paced, deadline driven environment. • Capacity to work in a first of its kind program that requires a high level of adaptation and willingness to be flexible as the project evolves. • Proficiency with technology and data management systems a must. • Bilingual in English/ Spanish preferred</p>
Link to application web site (if	https://theseniorsource.org/about-us/careers/

applicable)

Application Contact Name	Shannon Miller
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