

## ***Full Access Brokerage*** **Personal Agent**

*FAB's mission is to assist individuals with developmental disabilities pursue a quality of life that is consistent with their preferences and choices. This is accomplished by assisting individuals and family members to plan their supports, and by providing fiscal intermediary services, training and technical assistance.*

### **EDUCATION/EXPERIENCE REQUIRED:**

- An undergraduate degree in a human services field and at least one-year experience in the area of developmental disabilities; or
- Five years of equivalent training and work experience related to developmental disabilities

### **Other Requirements**

- Valid Oregon driver's License with good driving record
- Reliable vehicle or consistent means of transportation
- Ability to pass a full criminal history background check
- Ability to function in a team environment, multi-task and demonstrate flexibility

### **SUMMARY OF ESSENTIAL DUTIES:**

The Personal Agent works under the supervision of the Executive Director to insure proper planning, management and evaluation of direct client services. The Personal Agent serves as the principal liaison and agency representative to families, school districts and agencies. The Personal Agent links individuals and families to the supports they need. This involves extensive problem solving, contract negotiations and financial management. The Personal Agent provides needs assessments, develops service plans, coordinates referrals to agencies and other providers, monitors progress and maintains client records.

### **PRINCIPLE DUTIES:**

- Interviews customers who are eligible to determine their needs, provides problem solving in crisis situations when appropriate, and develops a plan of service for the individual and/or family.
- Provides support consultation to about 45 individuals, maintains regular contact with individuals and families and monitors progress of the service plan, visits the individual and/or family at home when appropriate.
- Arranges for a variety of goods and services including but not limited to respite care, special medical, diet or recreational services, etc.
- Makes referrals to outside agencies, describes agency and financial options to customers and/or families, and determines financial eligibility, guides customer and family through procedures. Develop financial plan if needed.
- Facilitates the development by community organizations of services needed by customers that don't currently exist or don't currently accommodate the specific needs identified.
- Maintains records of evaluations, service plans, referrals, service provision, case notes, extensive other documentation and follow-up reports for each individual.
- Prepares reports and provides statistical information as required by supervisor.
- Attends and participates in staff meetings and training programs.
- Assists with other Personal Agents' clients as needed.
- Demonstrates active team work with all parts of the organization.
- Other duties as assigned by the supervisor or Executive Director.

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**Signature**

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**Date**

***Full Access Brokerage is an equal opportunity employer***