

*Code: 1115*

*Title: FINANCIAL COUNSELOR*

**SUMMARY:** Provides financial screening and counseling assistance to Pima County clients and processes associated documentation.

**DUTIES/RESPONSIBILITIES:** (Work assignments may vary depending on the department's needs and will be communicated to the applicant or incumbent by the supervisor.)

Interviews clients and reviews supporting documentation to determine financial status;  
Determines client's ability and willingness to accept responsibility for the self payment of bills;  
Refers clients/guarantors to seek funding from applicable assistance programs, as appropriate;  
Discusses personal financial options available to the client through relatives, asset liquidation and financial institutions;  
Negotiates and establishes payment arrangements directly with the client;  
Calculates payments in a manner consistent with Pima County policies and procedures and ability to pay;  
Records calculated amounts and agreed-to financial terms, or according to a Court order, into various County computer systems;  
Proofs and reconciles output reports with input documents from a manual and/or automated accounting system;  
Collects payments at time of service and/or secures signatures on promissory notes and other financial instruments, if applicable to department policy and procedure;  
Maintains records and logs and reviews/processes all claims to ensure accuracy and timely resolution to minimize financial losses to the County or to assure adherence to a Court order;  
Receives, screens, directs and provides routine information in response to phone calls, e-mails and face-to-face interviews regarding accounts;  
Attends court hearings to provide financial screening/counseling to clients;  
Maintains security and confidentiality of information created or encountered in the performance of assigned duties.

**KNOWLEDGE & SKILLS:**

Knowledge of:

- basic bookkeeping principles and practices;
- policies and procedures for the billing, adjustment and collection of accounts;
- County policies and procedures for the receipt, accounting for and disposition of receivables;
- financial office practices and procedures;
- financial record keeping and filing systems;
- computerized financial management, record keeping and filing systems;
- court procedures and related documents;
- related terminology.

Skill in:

- interpreting and analyzing personal financial statements and related data;
- negotiating payment arrangements and effectively communicating requirements and expectations;
- assisting clients to resolve financial issues and concerns;
- entering information into and retrieving information from financial records and a computer database;

- providing effective customer service to clients in-person, by telephone or e-mail;
- compiling financial reports;
- maintaining a manual or automated financial filing system.

MINIMUM QUALIFICATIONS:

Three years of experience in providing financial counseling to clients or directly related finance or accounting experience such as accounts receivable and/or accounts payable or customer service in a financial/clerical setting.

OTHER REQUIREMENTS:

Special Notice Items: Some positions may require satisfactory completion of a background investigation by law enforcement agencies, due to need for access to law enforcement, corrections, detention and courts facilities or associated confidential or sensitive information, documents, communications systems and like materials.

Physical/Sensory Requirements: Physical and sensory requirements will be determined by position.

This class specification is intended to indicate the basic nature of positions allocated to the class and examples of typical duties that may be assigned. It does not imply that all positions within the class perform all of the duties listed, nor does it necessarily list all possible duties that may be assigned.

Pima County

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