

*Code: 5361*

*Title: PUBLIC FIDUCIARY CASE INVESTIGATOR*

**SUMMARY:** Provides psycho-social assessments and investigates to determine the need for court appointment of a guardian and/or conservator.

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

Responds to referrals from medical, mental health, law enforcement and other community sources;  
Screens referrals, collects and documents information, determines basis for further action regarding the necessity for guardianship and/or conservatorship and initiates investigation;  
Performs primary assessment of potential ward which includes compilation of psycho-social history and mental status examination;  
Interviews and evaluates family and community relationships to determine alternatives or initiates guardianship and/or conservatorship;  
Investigates crisis conditions, evaluates necessity for emergency guardianship and/or conservatorship and prepares recommendation for court appointment;  
Obtains and evaluates information from medical, psychiatric, mental health counseling and legal sources regarding the behavior problems of potential wards to assess mental competency;  
Initiates case staffing with other fiduciary staff to implement arrangements for the storage, disposal or placement of client's property and pets;  
Assists other fiduciary staff in conducting searches, inventories of personal property and gathering and evaluating financial data of decedent's or client's estate to determine economic status;  
Maintains a close liaison with law enforcement, government and social service agencies and medical and legal professions to promote cooperation and insure communications on matters of mutual interest;  
Maintains case reports and prepares various documents, reports and client summaries;  
Maintains appropriate security and confidentiality of information created or encountered in the performance of assigned duties;  
Testifies in court on results of findings.

**KNOWLEDGE & SKILLS:**

Knowledge of:

- methods, principles and practices of the social welfare professions;
- techniques and principles of crisis intervention;
- performing and interpreting mental status evaluations;
- conducting and interpreting psycho-social evaluations;
- interviewing and investigative methods and techniques;
- relevant laws, rules and regulations pertaining to guardian and conservatorship;
- characteristics of emotional instability and suicidal tendencies;
- techniques of short-term therapeutic intervention;
- legal and medical terminology.

Skill in:

- discerning and evaluating cognitive and functional relationships through interviews, observations and mental status examinations and making appropriate recommendations;
- developing and maintaining effective relationships with clients, family members and others;
- analyzing information, evaluating situations and making appropriate decisions;

- reacting quickly and calmly in emergencies;
- communicating effectively;
- keeping records and preparing reports.

MINIMUM QUALIFICATIONS:

A Bachelor's degree from an accredited college or university in a social or behavioral science, or a closely related field as defined by the appointing authority and two years of experience in crisis intervention counseling or performing psycho-social and mental status evaluations.

(Additional relevant experience and/or education from an accredited college or university may be substituted)

OTHER REQUIREMENTS:

Licenses and Certificates: Some positions may require possession of a valid Arizona drivers license with appropriate endorsement(s), as defined by the appointing authority. Failure to maintain the required licensure shall be grounds for termination.

Physical/Sensory Requirements: Physical and sensory abilities 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.