Position Title: **Occupancy and Compliance Specialist** Date: November 2020

Reports To: Occupancy and Compliance Manager Location: GWC, CSSL, MCAB

**I. Position Summary:**

The Occupancy and Compliance Specialist (OCS) is responsible for providing administrative support for the Occupancy and Compliance Manager specifically for Assisted Living Communities (ALC). The OCS is responsible for processing paperwork to verify residents meet regulatory set-aside requirements of the property. Job responsibilities include interviewing housing applicants/residents, maintaining waitlist and preparing data for entry into Property Management software regarding Occupancy (Interim and Annual Re-certifications). Assists with resident records documentation to comply with appropriate affordable housing regulations. Coordinates with LTC Administrator, Director of Nursing, Memory Care at Allen Brook Manager, applicant and applicant’s Power of Attorneys, when applicable, to ensure timely move in. Responsible for processing residential payments, processes subsidy payments from various sources and reviews resident accounts, working to keep them balanced and follows up with residents or POA as needed. He/she will perform housing recertifications that will require traveling to the assisted living communities and meeting with residents.

**II. Principal Responsibilities:**

**1. Intake:**

* Utilizing appropriate wait lists, he/she calls housing applicants to fill vacant units at all Assisted Living sites.
* Keeps wait list for each property/funding group up-to-date by contacting applicants via telephone and mail, updating all notes in BostonPost, and filing update forms in applicant files.
* Responsible for determining applicant eligibility for each available unit, sending out wait list rejection letters when appropriate, and participating in denial appeal hearings when necessary.
* Prepares and processes all new resident move in paperwork, including landlord/criminal checks, verifications, 50059 or tenant income certification, lease and enter into Boston Post.
* Has comprehensive knowledge of Assisted Living community’s Admission’s Policy and Procedure, current case mix needs, apartment types and understanding of how they relate to each other in order to answer applicant and resident questions.
* Communicates with Assisted Living site DON and Manager to ensure consistent communication with applicant and/or their POA regarding process and time frame
* Once move in file is ready, AL OCS will provide it to OCM Manager for file review.
* Adds security deposits to resident accounts and works with Residential Finance Associate to ensure that all security deposits have been paid.
* Meets weekly with supervisor to review vacancy, move-in status, any advertising needs, and issues related to occupancy.
* Helps applicants fill out applications as needed. Sends applications as needed.
* Reviews monthly Assisted Living Occupancy Reports to stay current with changes in vacancy, resident pay type (private pay or Medicaid) and Level of Care case mix

**2. Annual Recertification Files:**

* Check BostonPost monthly to ensure that all residents who need recertification have been recertified.
* Prepares individual files for each resident in need of recertification at each of our sites.
* Travels to CSC’s Assisted Living sites to conduct resident interviews and obtain signatures on recertification paperwork.
* Regularly checks outstanding third-party verification paperwork for return and follows up with agencies/individuals to ensure verifications are received in a timely manner.
* Processes all Annual and Interim certifications in Boston Post, including Transfers and Move Outs as needed.
* Ensures all necessary documentation is in order.
* Regularly audits resident files to ensure accuracy and completeness.
* Ensures compliance with HUD, LIHTC, and HOME regulations for all recertification, billing, and reporting requirements.
* Coordinates with local housing authorities for residents who have a Section 8 voucher.

**3. Process Check Deposits:**

* Receives rental checks, security deposit checks, and miscellaneous checks from on-site staff, housing authorities and directly from residents. Copies checks and prepares deposits.
* Inputs checks into BostonPost software.
* Communicates with site staff and residents if there are errors.
* Adds receivables to resident accounts as necessary.
* Works with Finance Department staff to resolve any rent/subsidy issues.
* Reviews electronic fund transfers for rent each month for accuracy and provides Finance staff with approval.
* Works closely with residents, site staff and housing authorities to ensure resident accounts are in balance and accurate.
* Has complete working knowledge of Medicaid billing process and calculation of Room and Board in conjunction with HUD rent
* Adjusts and communicates to residents and/or POA any changes in monthly payments in accordance with yearly Vermont State Medicaid Room and Board increases and HUD rent increases
* Reviews monthly Assisted Living Occupancy Reports to ensure all Medicaid patient shares and private pay days are being billed accurately

**4. Regulatory Compliance:**

* Ensures compliance with HUD.
* Ensures compliance with Medicaid.
* Ensures compliance with Residential Care and Assisted Living Regulations.
* Ensures compliance with HIPPA and OSHA.
	+ Maintains on-going compliance with appropriate local, state, federal and regulatory and accrediting body standards.

**5. Other General Duties:**

* Cross-trains with OCM so that this position is able to cover in his/her absence or support during unusually busy times.
* Scanning and filing as necessary.
* Runs special reports from BostonPost as requested.

**III. CSC Standards of Conduct:**

* Demonstrates a commitment to the vision, mission and values of CSC.
* Demonstrates respectful and effective communication with co-workers, residents, families and vendors.
* Protects the privacy and confidentiality of information related to residents, families, staff and general CSC operations.
* Communicates a positive image about CSC to the community.
* Conducts him/herself in a safe manner by adhering to all safety practices, rules and standards throughout the work day.
* Demonstrates a commitment to quality and proactively seeks to make improvements to systems and processes.
* Maintains a professional appearance that is appropriate for his/her position.
* Reports to work on time, completes time card accurately in Evoclock, provides advance notice for time off, and appropriately manages CTO time.
* Demonstrates a commitment to integrity in work habits and use of CSC resources.
* CSC’s mission and operations require that staff are prepared to perform duties as assigned including responsibilities that are not principal accountabilities.

**IV. Minimum Qualifications:**

An Associates degree or financial background and data entry experience is preferred.

Must have excellent written, oral communication, organizational and time management skills. Ability to multi-task and willingness to cross-train in a variety of housing-related tasks, as well as learn and adhere to appropriate regulations is required. Accuracy entering and working with numbers is essential. The ability to maintain confidentiality, exercise good judgment and to work closely and cooperatively with staff to ensure the smooth administration of programs is essential in this position. Experience with BostonPost, MS Word and Excel is preferred, but not required. Regulatory compliance or knowledge of HUD and LIHTC is preferred. Knowledge of Medicaid Waiver programs, ACCS, ERC and other funding programs and governing bodies related to assisted living. Valid Drivers’ license and reliable transportation is required.

**V. Working Conditions and Physical Demands:**

* Exposure to body fluids, infection, odors and behavior of residents.
* Fast-paced work environment with concentrated staff.
* Must be able to lift, push, pull or carry 25 pounds.
* Travel is necessary for this position.

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