

**ELIGIBILITY SPECIALIST I – MS**GENERAL DESCRIPTION

The Eligibility Specialist classifications determine the eligibility of applicants and recipients for public assistance programs through interactive interviewing and fact gathering; maintain current knowledge of program regulations and procedures necessary for multi-program caseload administration; initiate and process casework through automated systems; identify needs and make appropriate referrals for health, social, and/or employment services; and perform related work as required.

The Eligibility Specialist I is the entry-level classification in the Eligibility Specialist series. Incumbents may have prior experience determining eligibility for loans, financial assistance, unemployment or veterans benefits, or publicly or privately funded health, counseling or social services programs; have completed initial classroom training provided as part of the Eligibility Specialist Trainee training program; or may have the required level of education. Incumbents will be placed in a work team and initially may receive classroom instruction prior to being assigned casework and/or tasks. Incumbents will work under close supervision while learning to independently determine public assistance eligibility, and apply knowledge and skills learned from their training in completing eligibility tasks and applying complex regulations. As incumbents gain experience and work toward the journey level in the series, they are expected to work with more independence and have the ability to complete more complex tasks and/or handle larger client caseloads. Incumbents are expected to progress to the journey-level Eligibility Specialist II upon completion of one year of satisfactory performance in the entry-level Eligibility Specialist I classification.

SUPERVISION EXERCISED AND RECEIVED:

Incumbents in the Eligibility Specialist I and II classifications typically receive supervision from an Eligibility Supervisor and may receive lead direction from an Eligibility Specialist III.

MINIMUM QUALIFICATIONS

EITHER

Pattern 1: One year full-time experience in an Eligibility Specialist Trainee classification in an Interagency Merit System (IMS) county;

OR

Pattern 2: One (1) year of full-time experience determining eligibility for health programs, loans, financial assistance, unemployment, or other benefits and two (2) years of clerical work involving public contact;

OR

Pattern 3: Two (2) years of full-time experience determining eligibility for health programs, loans, financial assistance, unemployment, or other benefits;

OR

Pattern 4: Four (4) years of full-time clerical work involving public contact, interviewing, math computations, completion of forms or eliciting information from the public;

OR

Pattern 5: Graduation from an accredited four-year college or university.

Minimum Qualification Interpretation: A combination of education and experience comparable to the type of experience listed may substitute for either pattern. When combining education and experience, two and a half (2.5) semester units or three and a half (3.5) quarter units equal one month of experience.

### WORK PERFORMED

TYPICAL DUTIES: Duties may include, but are not limited to, the following:

Performs interactive interviews to elicit eligibility information, obtain and/or verify financial, employment, tax and personal demographic information and determine eligibility for public assistance programs and services

Analyzes financial and eligibility information to determine initial or continuing eligibility for multiple aid programs

Explains regulations, rules and policies to clients and apprises them of their rights, responsibilities and eligibility for participation in various public assistance programs and services

Ensures accuracy and completion of application and declaration forms

Resolves discrepancies by securing documentation, medical records and confirmation from other agencies

Enters and retrieves numerical and narrative data and issues benefits from an automated computer system

Determines the level of benefits to which the client is entitled by making complex computations and/or computer entries and then analyzing the results

Reviews and interprets information provided on a variety of forms both by the client and third parties to assist with eligibility determination

Evaluates clients for and answers questions on Advanced Payment Tax Credits (APTC) related to health care reform

Explains a variety of plan options, costs and individual plan features through Covered California

Monitors on-going eligibility by obtaining periodic updated information of eligibility factors and takes appropriate actions on changes

Determines need for additional services and makes referrals as needed for employment and other services to outside agencies to assist clients toward self-sufficiency and directs clients accordingly

Organizes and prioritizes caseload so that necessary case records and documents are processed and updated within specific time limits established by regulation and local policy

Enters and maintains case records, including written narratives, forms and computer documents in a clear and readable format

Troubleshoots task and/or case issues to determine appropriate resolution of problems, involving Help Desk as needed

Communicates both orally and in writing with clients and others related to the initial and ongoing eligibility determination while maintaining confidentiality

Responds to questions and complaints of clients in person, by telephone, mail and/or email communication

Provides pertinent forms and pamphlets to clients as required

Identifies suspected fraud and makes referrals for investigation

Makes referrals to social service workers as needed

Participates in special projects, studies, work assignments and committees

Prepares correspondence and reports

Performs related duties as assigned

#### EMPLOYMENT STANDARDS:

##### Knowledge of:

General goals and purpose of public social services programs

Laws, rules, regulations, policies and procedures governing eligibility for diverse public assistance programs and related case administrative techniques

Methods and techniques of conducting an investigative interview and information gathering

Computer terminology and computer keyboard arrangement

Modern office practices, methods and procedures

Record keeping practices and procedures

Principles of mathematical calculations

Intricacies of health insurance plans, medical health plan options and associated terminology

Regulations and rules regarding household filing status related to the Affordable Care Act

Cultural and human behavior, including knowledge of self, to interact effectively with clients and staff

Principles and practices of effective customer service

Structure and content of the English language including the meaning and spelling of words, rules of composition and grammar

Modern equipment and communication tools used for business functions and program, project and task coordination

Computers and software programs (e.g., Microsoft software applications) to conduct research, assess information and/or prepare documentation

Skill/Ability to:

Apply the policies, procedures and programs of the County Social Services Department

Apply the laws, rules and regulations governing eligibility and grant determination for multiple public assistance programs and the case administration of these programs

Identify available resources and communicate with others to obtain and verify information concerning eligibility

Use fact finding techniques and perform in-depth and interactive interviewing

Determine appropriate course of action in emergency situations

Make referrals to appropriate agencies and social service programs

Detect and evaluate potential fraudulent situations

Analyze and interpret written, numerical and verbal data from various sources

Utilize multiple electronic information, social services systems and analyze and interpret such information

Enter and maintain data accurately and timely into a computerized system

Navigate through computer screens and effectively use computer systems, software applications and modern business equipment to perform a variety of work tasks

Identify when computer output is incorrect and make corrections

Process cases manually as required

Plan and organize caseload to ensure work is completed in accordance with regulations relating to eligibility and timeliness

Function effectively in a system with strict deadlines and constant changes

Read, understand, apply and explain complicated and detailed correspondence, reports, regulations and policy directives

Perform a variety of mathematical computations accurately and rapidly

Prepare clear, concise and accurate records and reports

Explain complex rules and programs so they can be understood by people of diverse socio-economic, cultural and educational backgrounds

Gather, record and correctly evaluate tax filing data, income and additional necessary information required for the determination of eligibility for one or more programs

Explain health insurance plan options and plan details available to clients through the Affordable Care Act

Review a variety of tax documents to obtain needed household filing information

Explain health care reform tax credit implications to clients

Refer clients to other community services as needed

Assess and manage difficult and hostile persons or situations; or call for intervention when appropriate

Interact with people in a courteous manner in person, on the telephone, by mail or email

Work in a fast-paced, professional office environment and prioritize a wide range of duties with varying time requirements to ensure timely completion

Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax

Establish and maintain cooperative working relationships with the public and staff

Follow written and oral directions and instructions

Some positions in this classification may require possession of a valid California driver's license. Employees who drive on County business to carry out job-related duties must possess a valid California driver's license for the class of vehicle driven and meet automobile insurability requirements of the County. Eligibility for employment for those who do not meet this requirement due to disability will be reviewed on a case-by-case basis by the appointing authority.

Classification Code:	6E02
Bargaining Unit:	40
FLSA Status:	Y
Workers' Compensation Code:	8810
Pay Table:	CNTY
Range:	272