



Eligibility Specialist

I

Class Code:
ES I - MSS

Bargaining Unit:

CALHR

Established Date: Jul 1, 2016

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CLASS DEFINITION AND 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.

TYPICAL DUTIES, EMPLOYMENT STANDARDS AND KSAS:

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

(For Eligibility Specialist I, duties are performed at the entry level.)

- 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

Note: The level and scope of the knowledge and skills listed below are related to job duties as distinguished between the two levels in the Definition section.

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

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

MINIMUM QUALIFICATIONS:

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.

Qualifying experience or education may be combined in order to meet the above requirements. When combining education and experience; fifteen (15) semester units or twenty-two and a half (22.5) quarter units equals six months of experience.

SUPPLEMENTAL INFORMATION:

ELIGIBILITY SPECIALIST I

APPLICANT INFORMATION REGARDING THE NATURE OF WORK PERFORMED

INTRODUCTION

Submitting an application is the first step toward a valuable and rewarding career as an Eligibility Specialist. We offer this additional information in an effort to provide you with a clear understanding of the nature of the job and its requirements. Please take the time to review this information prior to submitting an application.

NATURE OF WORK

The primary function of an Eligibility Specialist involves determining the eligibility of applicants and recipients for public assistance programs. Eligibility work is performed in an office environment, not in the field, and includes processing of a broad range of paperwork and entering information into a computer-based eligibility system with very time sensitive agency and legal deadlines. Individuals with bank teller experience are often well suited to Eligibility Specialist positions, as are those who have determined eligibility for loans, etc. Typical duties of an Eligibility Specialist include:

- Acting as the first contact for individuals seeking public assistance
- Interviewing applicants and recipients (clients) to obtain and verify information needed to determine initial and/or ongoing eligibility for public assistance. This often requires obtaining information in difficult and/or emotional situations on issues such as earnings and financial obligations and/or parental status and living arrangements and maintaining control of the interview if the client becomes hostile or angry over the interview questions.
- Learning numerous state and federal program regulations and specific county practices through intensive training prior to full case assignment and ongoing training thereafter. The work of an Eligibility Specialist is highly regulation driven with ongoing reliance on regulations.
- Instructing clients in the completion of various forms and reviewing applications for completeness and consistency.
- Explaining program benefits, requirements and procedures, including eligibility factors, to public assistance clients.
- In some cases, visiting clients in their homes for the purpose of obtaining and verifying information.
- Determining program eligibility in accordance with current regulations using the computer-based eligibility system.
- Researching questionable information provided by an applicant until satisfactory explanations regarding eligibility status are confirmed.
- Reporting cases where fraud is suspected.
- Advising clients of deadlines, timeframes, and necessary actions to be taken.
- Working with clients who often do not take the necessary actions within the required timeframe.
- Establishing and maintaining multiple case files through regular updating and review. Documenting all communications and contacts with clients.
- Planning and organizing a large caseload, ensuring that accuracy levels are maintained and that cases are processed within the specified timeframes set by federal and state regulations.
- Preparing system generated documents necessary to initiate, continue, and/or modify public assistance.
- Computing and authorizing grant amounts based on financial and family status. Computing CalWORKs budgets, Medi-Cal budgets, General Assistance budgets, and CalFresh in order to calculate grants.
- Reviewing and explaining to clients public assistance amounts and authorizing payment of monthly benefits.
- Providing information and making routine referrals to resources available through the County and within the community for clients desiring or needing services. In some cases, Eligibility Specialists also refer clients to and communicate with Social Workers and other staff to coordinate family services. Note: An Eligibility Specialist's responsibilities do not include social service casework. An Eligibility Specialist is not responsible for working with clients to attempt to resolve their personal or social problems.

- Keeping up to date on changes in rules, laws, procedures, etc. that affect processing timelines.

Eligibility Specialists are expected to handle a high volume of work which is deadline driven. Applicants must be able to prioritize, plan and project their work, but at the same time be flexible to changes at any moment, such as unscheduled visits from clients.

It is important to understand that the actions you take as an Eligibility Specialist affect the lives of clients and their families.

CONTROVERSIAL ISSUES

As an Eligibility Specialist you may be required to take actions that conflict with your own values. An Eligibility Specialist must be able to accept clients' differences and interact with them in a non-judgmental manner. Some of the controversial issues encountered in an Eligibility Specialist environment include:

- Granting Medi-Cal for clients requesting abortions
- Granting Medi-Cal to minors without their parent's knowledge
- Clients with AIDS and other communicable diseases
- Applicants/recipients involved in Welfare fraud.
- Clients who have substance abuse dependency
- Clients who are domestic violence victims
- Clients who are mentally ill
- Clients with felony convictions
- Homeless individuals and families
- Elderly and/or disabled clients placed in long-term care facilities
- Mandatory report of child and adult abuse
- Clients whose life style, culture and/or values may be significantly different than your own

SPECIAL AND DRIVER'S LICENSE REQUIREMENTS:

Some positions in this classification may require possession of a valid California driver license. Employees who drive on County business to carry out job-related duties must possess a valid California driver 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.

HISTORY INFORMATION:

Established: 01/22/76 Eligibility Worker I/II

Revised: 07/01/03 Eligibility Worker I/II

Revised: 08/20/13 Eligibility Worker I/II

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