

ELIGIBILITY SPECIALIST I

DEFINITION

Under supervision, 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. Eligibility Specialist may refer clients to other staff or community resources and do related work as required.

DISTINGUISHING CHARACTERISTICS

The Eligibility Specialist I is the entry- level 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 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 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.

REPORTS TO

Eligibility Supervisor or Program Manager

CLASSIFICATIONS DIRECTLY SUPERVISED

None

ELIGIBILITY SPECIALIST I - 2

EXAMPLES OF DUTIES

- 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 answers questions on Advanced Payment Tax Credit (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 policy
- Enters and maintains case records, including written narratives, forms and computer documents in a clear and readable format
- Troubleshoots tasks 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 investigations
- Makes referrals to social service workers as needed

- Participates in special projects, studies, work assignments and committees

ELIGIBILITY SPECIALIST I- 3

EXAMPLES OF DUTIES – continued:

- Prepares correspondence and reports
- Performs related duties as assigned

TYPICAL PHYSICAL REQUIREMENTS

Sit for extended periods; frequently stand and walk; normal manual dexterity and eye-hand coordination; corrected hearing and vision to normal range; verbal communication; use of office equipment including computers, telephones, calculators, copiers, and FAX.

TYPICAL WORKING CONDITIONS

Work is performed in an office; occasionally works outside; continuous contact with staff and the public.

DESIRABLE QUALIFICATIONS

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

ELIGIBILITY SPECIALIST I- 4

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

ELIGIBILITY SPECIALIST I - 5

Ability to - continued:

- 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

Training and Experience:

Qualifications for the position:

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

OR

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

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

OR

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

OR

Equivalent to the completion of 60 semester units or 90 quarter units from an accredited college or university.

OR

Graduation from an accredited four-year college or university.

ELIGIBILITY SPECIALIST I - 6

Training and Experience – continued:

***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 (22) quarter units equal six months of experience.

Special Requirements: Must possess a valid driver's license at time of application and a valid California Driver's License by the time of appointment. The valid California License must be maintained throughout employment.

Employees in this classification may be required to work holidays, weekends, and evenings. Some travel may be required.

Ability to pass a background/criminal records check as authorized by sections 16501 of the California Welfare Institutions Code and section 11105.3 of the California Penal Code.

All County of Plumas employees are designated Disaster Service Workers through State law (California Government Code Section 3100-3109). Employment with Plumas County requires the affirmation of a loyalty oath to this effect. Employees are Required to complete all Disaster Service Work related training as assigned, and to return to work as ordered in the event of an emergency.