



ELIGIBILITY SPECIALIST III

CLASSIFICATION

DEFINITION

~~The Eligibility Specialist III is the advanced journey/lead level classification and subject matter expert in the Eligibility Specialist series. Incumbents perform~~

~~Under general direction, performs the most complex work and specialized assignments requiring an advanced level of technical knowledge in the determination of eligibility for one or more public assistance programs, departmental processes, and caseload/workload administration. Incumbents are expected to independently perform specialized and/or complex duties beyond the journey level classification of the series. In addition, incumbents may perform; performs help desk functions; provide; provides training to a unit of workers determining eligibility for public assistance and/or serve; serves as a lead worker for less experienced employees. Incumbents; and performs specialized duties or assignments such as fair hearing or welfare collections that require considerable inter program knowledge of eligibility regulations, policies, and procedures; and performs related duties as assigned.~~

SUPERVISION RECEIVED AND EXERCISED

~~Receives general direction from an assigned Eligibility Supervisor. Exercises technical and functional direction over and provides training to lower-level staff.~~

CLASS CHARACTERISTICS

~~This is the advanced/lead-level classification in the Eligibility Specialist class series. Incumbents are expected to independently perform complex duties beyond the journey-level classification of the class series and demonstrate advanced knowledge of eligibility regulations, procedures, and eligibility software systems. Other Additional specialized assignments may include performing quality control and/or quality assurance reviews, participating in early fraud prevention programs, representing the County in administrative appeals and fair hearings, welfare collections for program overpayment, and/or performing other specialized assignments and related work as required.~~

~~The Eligibility Specialist III differs~~

~~This class is distinguished from the Eligibility Supervisor in that the latter directly supervises a unit of Eligibility Specialists. The class of Eligibility Specialist III is distinguished from the Eligibility Specialist II as the latter requires a higher level of supervision and the Eligibility Specialist III is assigned lead specialist duties or special assignments with a greater degree of independent judgment.~~

SUPERVISION EXERCISED AND RECEIVED

~~Incumbents in the Eligibility Specialist III classification receive supervision from an Eligibility Supervisor or other manager. An Eligibility Specialist III has no responsibility for direct supervision of others, but may provide lead direction to other Eligibility Specialists.~~

EXAMPLES OF TYPICAL DUTIES/JOB FUNCTIONS (Illustrative Only)

- Provides lead direction and/or training to a unit of workers determining eligibility of applicants and recipients for public assistance programs.
- Provides support to supervisor with unit operations and coverage.

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- > Performs interactive interviews to elicit eligibility information; obtain and/or verify financial, employment, tax, and personal demographic information; and identify need for public assistance programs and services.
- > Assists in the development and implementation of procedures for public assistance programs.
- > Analyzes financial and eligibility information to determine initial or continuing eligibility for multiple aid programs.
- > May provide services to drop-in clients, perform local help desk functions, provide lead direction and training to unit staff, and assist with the more complicated cases, or perform specialized assignments in the areas of investigations, quality assurance and control, and fair hearings.
- > Explains regulations, rules, and policies to clients and apprises them of their rights, responsibilities, and eligibility for participation.
- > 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 mathematical computations and/or complex computer entries.
- > 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~~ongoing 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/workload so that necessary case records and documents are processed and updated within specific time limits established by regulation and local policy.
- > Completes 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~~help desk as needed; may participate in system testing and design.
- > 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, meetings, conferences, and committees.
- > Prepares correspondence and reports.
- > Performs related duties as assigned.

When assigned Fair Hearing duties:

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- Receives request for Fair Hearing from the state, determines whether or not the appellant is eligible for aid pending the results of the hearing, and notifies appropriate eligibility unit.
- Reviews appellant's eligibility case file to gather facts relating to issues being appealed and to determine whether or not the Agency's actions were in conformance with regulations.
- Analyzes categories and frequency of Agency errors and misinterpretation of regulations; recommends staff training or policy changes as necessary.
- Prepares written appeal and complaint reports setting forth the Agency's position on the issues being appealed, reviews state decisions and, when appropriate, develops written justification for a re-hearing.
- Represents the Director in presenting the County's case at hearings, subpoenas witnesses to appear at the hearing, and ensures that necessary documents are available; forwards appeal and complaint decisions to eligibility unit for compliance; and monitors case to insure compliance within required time frame.
- Researches applicable regulations and contacts the state for definitive interpretation on questionable issues.

When assigned Welfare Collections duties:

- Ensures the collection of Self-Sufficiency Program overpayments by direct contact, correspondence, legal action, and/or other recovery methods.
- Locates and personally interviews welfare department clients and public or private agencies regarding clients' financial capabilities.
- Explains legal obligations and possible legal consequences of non-payment and attempts to persuade clients to make voluntary payments without recourse to legal action.
- Interfaces with the centralized collection operation in using County informational data.
- Ensures that collected funds are accurately accounted for to ensure proper distribution to appropriate government agencies.
- Appears in court and testifies on facts relating to individual action.

QUALIFICATIONS

EMPLOYMENT STANDARDS

Knowledge of:

- Principles of ~~General goals~~ providing functional direction and training.
- Principles and practices of leadership.
- Goals and the purpose of public social services programs.
- Applicable laws, rules, regulations, policies, and procedures governing eligibility for diverse public assistance programs and related case administrative techniques.
- Advanced procedures for eligibility determinations and continuing eligibility.
- Methods and techniques of conducting an investigative interview and information gathering.
- Computer terminology and computer keyboard arrangement
 - Recordkeeping
 - Principles of training and staff development
 - Modern office practices, methods and procedures
- Record-keeping practices and procedures.
 - Principles of mathematical calculations

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- > Intricacies of health insurance plans and 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 of mathematical calculations.
- > Principles and ~~practices of techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.~~
- > Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.
- > ~~Structure~~The 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~~packages) to conduct ~~research, assess information, compile, and/or prepare~~generate documentation.

In addition to the above, if assigned Fair Hearing duties:

- > Administrative procedures for the Fair Hearing process.

In addition to the above, if assigned Welfare Collections duties:

- > Pertinent laws, regulations, and codes relating to collections.
- > Methods and techniques used in determining financial assets.
- > Financial recordkeeping and billing procedures.
- > Sources of information used in locating individuals and assessing financial status.

Ability to:

Lead, direct

- > Plan, organize, coordinate, and train ~~other eligibility~~lower-level staff.
- > Effectively provide staff leadership and work direction.
- > Evaluate and make appropriate recommendations and corrections on selected cases.
- > Determine appropriate ~~course~~courses of action in emergency situations.
- > 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.
- > 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, and social services systems, and analyze and interpret such information.
 - Enter data accurately 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~~identify when computer output is incorrect and make corrections.

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- ~~• Process cases manually as required~~
- ~~• Plan and organize caseload/workload 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 and 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 IRS 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.
- Plan and organize caseload/workload 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 and 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 socioeconomic, cultural, and educational backgrounds.
- 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, both in person, on the telephone, by mail or email communication~~
- Work in a fast-paced, professional office environment and prioritize a wide range of duties with varying time requirements to ensure timely completion.
- Follow written and oral directions and instructions.
- Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish ~~and~~, maintain ~~cooperative~~, and foster positive and effective working relationships with those contacted in the public and staff course of work.
 - ~~• Follow written and oral directions and instructions~~

MINIMUM

In addition to the above, if assigned Fair Hearing duties:

- Present statements of fact, law, and argument clearly and logically in both oral and written form.
- Gather information through record examination, research, and interviews; draw logical conclusions and make effective recommendations and sound decisions.
- Evaluate categories of Agency errors or regulatory or procedural misinterpretations resulting in appeals and complaints.

In addition to the above, if assigned Welfare Collections duties:

- Understand, explain, and apply laws, rules, and regulations pertaining to the legal collection of funds and seizure of property.
- Understand and interpret welfare Self-Sufficiency programs.

QUALIFICATIONS (Education and/or Experience):

Eligibility Specialist III:

One (1) year of full-time experience ~~in an performing duties equivalent to the County's class of Eligibility Specialist II classification in an Interagency Merit System (IMS) County;~~

OR

Three (3) years of full-time experience determining eligibility for public assistance programs or collections experience which must have included interviewing and negotiating payments in a public human services agency.

DRIVER LICENSE REQUIREMENT

~~Some positions in this classification may require possession of~~ Licenses and Certifications:

- Possession of, or ability to obtain and maintain, a valid California driver license or Nevada Driver's License and a satisfactory driving record.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, and to operate a motor vehicle to visit various County and meeting sites; vision to read printed material and a computer screen; and hearing and speech to communicate in person and over the telephone. Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees ~~who drive on County business to carry out job-related duties~~ must possess a valid

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~~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~~ability to lift, carry, push, and pull materials and objects up to 25 pounds with the use of proper equipment. Reasonable accommodations will be ~~reviewed~~made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

As required by ~~the appointing authority~~Internal Revenue Service Publication 1075, individuals in positions that have access to Federal Tax Information (FTI), will be subject to a background investigation and a criminal history check. In addition, individuals hired into positions that have access to FTI will be re-investigated at least once every ten (10) years.

History

~~Established: 01/22/76 Eligibility Worker III~~

~~Revised: 07/01/03 Eligibility Worker III~~

~~Revised: 07/01/16 Eligibility Specialist III~~