

## **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 the most complex work and specialized assignments requiring an advanced level of technical knowledge in 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 help desk functions, provide training to a unit of workers determining eligibility for public assistance and/or serve as a lead worker for less experienced employees. Incumbents demonstrate advanced knowledge of eligibility regulations, procedures and eligibility software systems. Other 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 and/or performing other specialized assignments and related work as required.

The Eligibility Specialist III differs 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.

### **TYPICAL DUTIES**

- 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
- 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

## Merit System Services

fair hearings

- Explains regulations, rules and policies to clients and appraises 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 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 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

## **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
- Principles of training and staff development
- Modern office practices, methods and procedures
- Record keeping practices and procedures
- Principles of mathematical calculations
- 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 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:**

- Lead, direct and train other eligibility staff
- Evaluate and make appropriate recommendations and corrections on selected cases
- Determine appropriate course 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, social services systems and analyze and interpret such information

## Merit System Services

- 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 when computer output is incorrect and make corrections
- 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
- 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
- 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 (Education and/or Experience)**

#### **Eligibility Specialist III:**

One (1) year full time experience in an Eligibility Specialist II classification in an Interagency Merit System (IMS) County;

**OR**

## Merit System Services

Three (3) years of full time experience determining eligibility for public assistance programs in a public human services agency.

### **DRIVER LICENSE REQUIREMENT**

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**

Established: 01/22/76 Eligibility Worker III

Revised: 07/01/03 Eligibility Worker III

Revised: 07/01/16 Eligibility Specialist III