



## ELIGIBILITY SPECIALIST TRAINEE/I/II

### DEFINITION

Under close supervision, general supervision, or direction, determines the eligibility of applicants and recipients for public assistance programs through interactive interviewing and fact gathering; maintains current knowledge of program regulations and procedures necessary for multi-program caseload administration; initiates and processes casework through automated systems; identifies needs and makes appropriate referrals for health, social, and/or employment services; and performs related duties as assigned.

### SUPERVISION RECEIVED AND EXERCISED

Receives close supervision, general supervision or direction from an assigned Eligibility Supervisor. Exercises no direct supervision over staff.

### CLASS CHARACTERISTICS

*Eligibility Specialist Trainee:* This is the classroom and on-the-job trainee-level classification in the Eligibility Specialist class series where emphasis is on learning the basic regulatory and statutory requirements of multiple public assistance programs. Incumbents may receive classroom instruction and/or on-the-job training prior to being assigned casework or tasks. Once incumbents are placed in a unit, they will continue to participate in on-the-job training and may be assigned a variety of duties, including some casework/tasks which will assist them in learning to determine initial and continuing eligibility for one or more public assistance programs. Incumbents work under close supervision to complete initial case functions as they continue to learn procedures and complex regulations and acquire the ability to apply the regulations during the training period. Trainees are given the opportunity to perform increasing levels of eligibility determination to prepare them for the entry-level Eligibility Specialist I classification.

*Eligibility Specialist I:* This is the entry-level classification in the Eligibility Specialist class 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 general 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 class series, they are expected to work with more independence and have the ability to complete more complex tasks and/or handle larger client caseloads.

*Eligibility Specialist II:* This is the fully qualified journey-level classification in the Eligibility Specialist class series. Incumbents demonstrate working knowledge of eligibility regulations, procedures, and eligibility software systems. Eligibility Specialist II incumbents handle more complex tasks and/or caseloads independently with consultation as needed by Eligibility Specialist IIIs or Eligibility Supervisors. Positions at this level are distinguished from the I-level by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully

aware of the operating procedures and policies of the work unit. Incumbents may assume specialized responsibility. Successful performance of the work requires thorough knowledge of governmental accounting practices and procedures, fund accounting, and fiscal management.

This class is further distinguished from the Eligibility Specialist III in that the latter class is assigned lead specialist duties or special assignments with a greater degree of independent judgment.

Positions in the Eligibility Specialist class series are flexibly staffed and positions at the II-level are normally filled by advancement from the I-level, and positions at the I-level are normally filled by advancement from the trainee-level, after gaining the knowledge, skill, and experience which meet the qualifications for and after demonstrating the ability to perform the work of the higher-level class.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

- Performs interactive interviews to elicit eligibility information; obtains and/or verifies financial, employment, tax, and personal demographic information; and determines 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 related to health care reform.
- Explains a variety of plan options, costs, and individual plan features through Covered California.
- Monitors 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 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 narrative, 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.

## **QUALIFICATIONS**

*Some knowledge and abilities may be gained by positions at the trainee and entry (I) level while in a learning capacity.*

### **Knowledge of:**

- General 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.
- Methods and techniques of conducting an investigative interview and information gathering.
- 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.
- Recordkeeping practices and procedures.
- Principles and 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.
- 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 packages) to conduct, compile, and/or generate documentation.

### **Ability to:**

- Learn and apply the policies, procedures, and programs of the Health and Human Services Agency.
- Learn and 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.
- Enter and maintain data accurately and timely into a computerized system; and identify when computer output is incorrect and make corrections.
- 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.
- 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 socioeconomic, 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.
- 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.
- 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, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*A combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying; however, education may not solely substitute for the required experience.*

Eligibility Specialist Trainee:

Two (2) years of full-time clerical experience involving public contact, interviewing, math computations, completion of forms, or eliciting information from the public;

OR

One (1) year of full-time experience determining eligibility for loans, financial assistance, unemployment or veterans benefits, or publicly or privately funded health, counseling, or social services programs;

OR

Completion of sixty (60) semester or ninety (90) quarter college units.

Eligibility Specialist I:

One (1) year of full-time experience performing duties equivalent to the County's class of Eligibility Specialist Trainee;

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 a bachelor's degree from an accredited four-year college or university.

Eligibility Specialist II:

One (1) year of full-time experience performing duties equivalent to the County's class of Eligibility Specialist I;

**Licenses and Certifications:**

- Possession of, or ability to obtain and maintain, a valid California 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 must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds with the use of proper equipment. Reasonable accommodations will be 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 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 the frequency prescribed in Publication 1075.