

## **ELIGIBILITY SPECIALIST I**

## **ELIGIBILITY SPECIALIST II**

### **CLASSIFICATION DEFINITION**

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.

#### **Eligibility Specialist I**

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.

#### **Eligibility Specialist II**

The Eligibility Specialist II is the journey-level classification in the Eligibility Specialist 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 in this class are flexibly staffed and are normally filled by advancement from the lower level or if filled from the outside, require prior experience as an Eligibility Specialist, Eligibility Worker or comparable position.

The class of Eligibility Specialist II is distinguished from the Eligibility Specialist I as the latter requires a higher level of consultation and supervision and is working toward achieving a working knowledge of program rules and regulations. The Eligibility Specialist II class is

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.

## **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**

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 (Education and/or Experience)**

### **Eligibility Specialist I:**

#### **EITHER**

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.

**Minimum Qualification Interpretation:** A combination of education and experience comparable to the type of experience listed may substitute for either pattern. When combining education and experience, two and a half (2.5) semester units or three and a half (3.5) quarter units equal one month of experience.

### **Eligibility Specialist II:**

#### **EITHER**

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

#### **OR**

Pattern 2: Two (2) 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

Prior revision: 07/01/03 Eligibility Worker I/II

Revised: 07/01/16 Eligibility Specialist I/II