

# ELIGIBILITY SUPERVISOR

## CLASSIFICATION DEFINITION

The Eligibility Supervisor is the first-line supervisory classification in the Eligibility Specialist series. The main function of this level is to provide supervisory, administrative and technical support to an eligibility work unit engaged in determining initial and continuing eligibility for multiple public assistance programs. Incumbents are responsible for planning and scheduling work assignments and ensuring adequate coverage and equitable caseloads/workload among staff members; identifying staff training needs; and conducting performance evaluations and recommending disciplinary measures. Incumbents analyze cases to ensure accuracy of decisions and timeliness of processing. Eligibility Supervisors assist with difficult program cases and make final processing decisions in relation to such cases. Incumbents assist in program development and management and perform related work as required. Most working supervisors also spend a substantial portion of their time performing the most difficult and complex work of the section or unit; and perform other specialized assignments.

This classification differs from the Eligibility Specialist III in that the former operates in full supervisory capacity and the latter is responsible for lead worker duties and/or managing specialized tasks or caseloads.

## SUPERVISION EXERCISED AND RECEIVED

Incumbents in the Eligibility Supervisor classification generally receive direct supervision from a Program Manager or other designated manager. Eligibility Supervisors provide direct supervision to a unit of Eligibility Specialists. Supervision may also include incumbents in other classes (e.g., Office Assistant, Integrated Case Worker, or a similar class).

## TYPICAL DUTIES

- Plans, assigns, supervises and reviews the work of a unit of employees determining eligibility of applicants and recipients for public assistance programs
- Selects, trains, evaluates and disciplines subordinate staff
- Provides direction to staff on implementation of policy and procedures
- Holds individual and group conferences to discuss or interpret rules, regulations and policies
- Confers with workers regarding discrepancies in the system
- Determines need for training and oversight and provides appropriate training and direction
- 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
- Troubleshoots task and/or case issues to determine appropriate resolution of problems, involving Help Desk as needed, or may perform Help Desk functions
- 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
- Identifies suspected fraud and makes referrals for investigation
- Represents the department at meetings, attends conferences and participates in studies, system testing and design and research projects as assigned
- Interviews complainants and addresses performance and personnel problems
- Participates in special projects, studies, work assignments and committees
- Receives and prepares correspondence and required reports relating to unit activity and other matters
- 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
- Resources available to obtain and verify information concerning eligibility
- Supervisory and staff development techniques and practices, including progressive discipline and labor relations
- 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 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:**

- Exercise sound judgment when organizing, directing and prioritizing unit activities
- Select, train, supervise, evaluate and discipline subordinate staff
- Evaluate and make appropriate recommendations and corrections on selected cases
- Determine appropriate course of action in emergency situations
- Make referrals to appropriate agencies and social service programs
- Detect and evaluate potential fraudulent situations
- 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
- 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 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
- Plan and organize workload to ensure staff's 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)**

#### **EITHER**

Pattern 1: One (1) year full time experience in an Eligibility Specialist III, Integrated Case Worker III, or Employment and Training Worker III classification in an Interagency Merit System (IMS) County;

#### **OR**

Pattern 2: Four (4) years of full time experience determining eligibility for public assistance programs or providing employment services 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 Supervisor  
Prior revision: 07/01/03 Eligibility Supervisor  
Revised: 07/01/16 Eligibility Supervisor