

CLASS SPECIFICATION



CLASS: Eligibility Technician
ALLOCATION: Health & Human Services
FLSA STATUS: Non-Exempt
UNION AFFILIATION: YCEA

ESTABLISHED: Prior 1985
REVISED: February 2023

JOB SUMMARY:

Determine eligibility of applicants and recipients for public assistance programs and/or assist with acquiring services and benefits through interactive interviewing and fact gathering; maintain current knowledge of multiple program regulations and procedures necessary for multi-program caseload determination; authorize payments following program procedures and guidelines; initiate and process case work through an automated system; identify needs and provide information or referral for health, social and/or employment services; act as an advocate for clients and their dependents by assisting in the preparation of forms and documents, obtaining and presenting evidence for claims or benefits and by representing clients before other agencies by following-up on claims or applying for benefits that may have been denied; provide quality customer service, and perform related work as assigned.

CLASS CHARACTERISTICS:

This position reports directly to an Eligibility Supervisor or Social Worker Supervisor and may receive lead direction from a Senior Eligibility Technician. This class is distinguished from the Senior Eligibility Technician in that the latter is the lead and/or specialist level in this series, reviewing determinations for quality control purposes and training eligibility staff in new and revised procedures.

EXAMPLES OF DUTIES:

Essential:

- Perform interactive interviews to elicit eligibility information and identify the need for public assistance programs and services and/or continuing benefits; handle crisis situations by authorizing payment within specific guidelines or referring the customer to the proper unit, individual, local, state or federal agencies and/or community service agencies.
- Analyze financial, employment, family and personal information to determine initial or continuing eligibility for multiple aid programs and/or applicable benefits.
- Interpret and explain regulations, rules and policies to customers; apprise customers of their rights, responsibility and eligibility for program participation and/or benefits.
- Ensure that application and declaration forms are completed accurately and completely.
- Respond to customer emergencies; make appropriate referrals in-house or the community organizations that can provide assistance or determine program(s) under which the customer can be assisted.
- Initiate procedures to grant, modify, deny, or terminate assistance, or refer applicants to other agencies for assistance.
- Resolve problems and discrepancies with information provided, including, but not limited to, completed forms, prior records of the department and automated records by securing documentation, medical records, employment and aid confirmation from other agencies.
- Participate in outreach activities to educate and offer services to public/customers; attend meetings and make presentations to various community groups.
- Provide respectful, equitable and consistent treatment across all channels of interaction with the public (e.g., in-person, telephone, etc.)
- On occasion, visit homes, hospitals, convalescent homes and other locations to assist members of the public with completing forms and filing documents.
- Initiate total-household assistance cases through automated means; review computer-produced documents for accuracy.
- Enter and retrieve numerical and narrative data and issues income maintenance benefits from an automated computer system.
- Organize caseload so that necessary case documentation is updated and filed properly within specific time limits established by regulation and local policy.
- Maintain accurate records and files; compile activity reports for submission to state and federal government agencies regarding claims and office activities.
- Prepare reports, correspondence and other written materials.

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Important:

- Comply with all county equipment and safety policies and procedures, and California Occupational Safety and Health Administration (Cal OSHA) rules and regulations.
- May be required to drive a personal or county-owned motor vehicle.
- Reads and interprets computer print-outs and information on computer screens.

ASSIGNMENT SPECIFIC DUTIES (in addition to the above): Call Center:

- Timely and efficiently, answer incoming calls and assist customers with eligibility and health care coverage options; and deliver consistent and accurate information.
- Identify and solve the needs of customers; provide information on health care coverage plans/options, determine eligibility for tax credits and subsidies and complete enrollment in Medi-Cal and other appropriate health care coverage.
- Ensure customers understand the current status of their case, what needs to happen next, and what the customer can do to facilitate the process.
- Record customer interactions, recording details of inquiries, complaints or comments as well as relevant information for determining benefits and any actions taken.

EMPLOYMENT STANDARDS:

Knowledge of:

- General goals and purposes of public human services programs.
- Techniques for interviewing and gathering information from a varied population.
- Mathematics sufficient to interpret customer income and expense information and to calculate benefits within program guidelines.
- Record keeping principles and practices.
- Business letter writing and the standard format for typed materials.
- The structure and content of the English language including the meaning and spelling of words, rules of composition and grammar.
- Principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Techniques for dealing with a variety of individuals from various socio-economic, ethnic and cultural backgrounds.
- Basic computer applications related to the work.
- Specific computer application related to human services work.
- Program eligibility requirements and regulations for a variety of human services programs.
- Basic medical terms used to describe mental and physical disabilities and the symptomatic behavior associated with such disabilities as necessary for assisting with and/or preparing benefits claims.

Skill in:

- Learning the human service programs and community resources provided by the county.
- Communicating clear and accurate information regarding customers to social workers.
- Interpreting and explaining complex rules, regulations, procedures and technical information.
- Establishing, maintaining, researching and verifying customer information and computer-produced customer data and files.
- Interviewing and obtaining accurate information from a diverse customer population.
- Interpreting financial information and making accurate mathematical calculations.
- Preparing clear and accurate notes, reports, correspondence and other written materials.
- Using automated technology to correct data and avoid over-payments and over-issuance of benefits.
- Entering data into a computer system with speed and accuracy.
- Resolving customer problems as required within procedural guidelines.
- Dealing successfully with a variety of individuals from various socio-economic, ethnic and cultural backgrounds, often when they are distraught or in high-stress situations.
- Understanding the implications of new information for both current and future problem-solving and decision-making.

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- Identifying customer needs and providing excellent customer service.
- Recognizing questions and situations outside area of responsibility and referring them to the appropriate person.
- Effectively and professionally communicating with those contacted in the course of the work and ensure timely and efficient service.
- Using initiative and independent judgment within established procedural guidelines.
- Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

Ability to:

- Listen carefully to what other people are saying, take time to understand the points being made, and ask questions as appropriate for clarification.
- Maintain composure, keep emotions in check, control anger, and avoid aggressive behavior, even in very difficult situations.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Process a high volume of work amid interruptions.
- Add, subtract, multiply or divide quickly and accurately and identify the appropriate mathematical method or formula to solve a problem.
- Organize, plan and prioritize work, developing specific goals and plans to accomplish your work in a timely manner as established by regulations and local policy.
- Take action on controversial issues that may conflict with personal values and interact with customers in a non-judgmental manner.
- Accurately gather, record and correctly evaluate data necessary for the determination of eligibility for one or more categorical aids including, but not limited to, food stamps, cash assistance and medical care.
- Detect and evaluate potential fraudulent situations.
- Respect the right of privacy and maintain confidentiality of customers.
- Manage customer interactions professionally, proficiently, and with good communication skills.
- Be attentive to and accurately record details of customer conversations and referrals.
- Type at a rate of 35 net words per minute from printed copy
- Listen, and/or speak while using a computer keyboard at the same time.
- Present a professional and friendly attitude and quickly develop a rapport with customers over the phone.
- Deliver services in a professional and respectful manner (with linguistic and cultural sensitivity) so that the customer's satisfaction with the process meets or exceeds his/her expectations from the point of first contact throughout the customer's experience with the department.

Physical Demands: The physical demands and work environment described here are representative of those that must be met by an employee to successfully perform the essential function of the job, with or without accommodation. Prospective employees must complete a pre-employment medical exam (Occupational Group IV) which will measure the ability to:

- See well enough to read fine print and view a computer screen; speak and hear well enough to understand, respond, and communicate clearly in person and on the telephone; independent body mobility sufficient to stand, sit, walk, stoop and bend to access the work environment and a standard office environment; manual dexterity and sufficient use of hands, arms and shoulders to repetitively operate a keyboard and to write; and the ability to sit or walk for prolonged periods of time.

Accommodation may be made for some of these physical demands for otherwise qualified individuals who require and request such accommodation.

Work Environment:

- Generally a typical office environment.

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QUALIFICATIONS:

The minimum and preferred requirements are listed below. While the following requirements outline the minimum qualifications, the county reserves the right to select applicants for further consideration who demonstrate the best qualifications match for the job. Meeting the minimum qualifications does not guarantee further participation in selection procedures:

Licenses and Certification:

- The ability to obtain a valid California Class C driver's license within ten (10) days of employment; may be required to maintain license throughout employment at the discretion of the Appointing Authority.
- When assigned to Veterans' Services and within one year of employment, obtain and maintain annually thereafter the Veterans Affairs accreditation by a National Service Organization and/or the California Department of Veterans Affairs.
- Typing Certificate: Minimum Net of 35 wpm. Typing Certificate must indicate results from a five (5) minute test with at least the minimum net wpm required.

Special Requirements:

- May be required to work a flexible shift outside of normal working hours including evening and weekend hours.
- If assigned to the Call Center, will be required to work a flexible schedule to include evening and weekend hours.
- Must successfully complete an extensive and thorough background investigation, which may include Live Scan fingerprinting prior to hire.
- Will be required to perform disaster service activities pursuant to Government Code 3100-3109.

Education and Experience:

MINIMUM: Graduation from high school and two (2) years of responsible office support experience which has involved extensive public contact, interviewing and decision making within procedural guidelines. Relevant education with coursework in a field related to human services may be substituted for the two years of experience as defined on a year-for-year basis.

PREFERRED: In addition to the minimum, additional experience determining eligibility for loans, financial assistance, or publicly or privately funded health, counseling or social services.

This class specification lists the major duties and requirements of the job. Incumbent may be expected to perform job-related duties other than those contained in this document.

Health & Human Services Approval:

Human Resources Analyst Approval:

Date:

Date:

Signature: _____

Signature: _____

EEOC: F
WC: 8810

Established: Prior to 1985
Revised: Feb 2008, June
2009, June 2013, Aug 2016, July
2019, November 2019