

## CLASS SPECIFICATION



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

**ESTABLISHED:** Prior 1985  
**REVISED:** September 2024

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### **JOB SUMMARY:**

Under general supervision, perform functions related to determining eligibility for, or continuation of, designated and specialized client service programs and their respective benefits; 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(s); identify needs and provide information or referral for health, human 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 relevant eligibility information and identify the need for the public assistance programs and services and/or continuing benefits; handle crisis situations by authorizing payment within specific guidelines or referring to the proper unity individual, local, state, or federal agencies and/or community service agencies.
- Analyze financial, employment, family, health, 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.
- Interview customers to assist with completing applications and related forms upon which eligibility decisions are made, with includes in-person interviews.
- Ensure that application and declaration forms are completed accurately and completely.
- Listen and/or speak while using a computer keyboard at the same time.
- Respond to client crises by taking appropriate action on their case or make applicable in-house or community referrals for necessary assistance.
- Initiate procedures to grant, modify, deny, or terminate assistance, and/or refer applicants to other agencies for assistance.
- Correcting errors and discrepancies with information provided, including, but not limited to, completed forms, prior case records 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.
- Rotate between functional units to complete an intake application.
- Provide respectful, equitable and consistent treatment across all channels of interaction with the public (e.g., in-person, telephone, etc.)
- On occasion, conduct visit at-homes, hospitals, convalescent homes, and other locations to assist clients with completing forms and filing documents.

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- Initiate total-household assistance 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.
- 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.
- 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.
- Responsible for conducting routine investigations into fraudulent activities.
- Advise the public regarding programs and benefits to which they may be entitled.
- Prepare applications, claims and appeals; secures necessary information, records, affidavits, statements, etc. from various sources; prepares correspondence and expedites claims or benefits.
- Review, compile, and tabulate data and prepare periodic state and federal reports related to caseload, case status and monetary awards.
- Maintain liaison and rapport with officials and organizations concerned with programs and benefits; assists in coordinating the provision of services with other agencies.
- May order materials and supplies; assist with maintaining records and files.
- Keep abreast of changes in laws affecting programs and benefits.

### **Important:**

- Comply with all county equipment and safety policies and procedures, and California Occupational Safety and Health Administration (Cal OSHA) rules and regulations.
- Use standard office equipment, including a computer in the course of the work.
- Reads and interprets computer printouts and information on computer screens.
- May be required to drive a personal or county-owned motor vehicle to attend conferences and training seminars or conduct field visits.

### **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.

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- 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.
- Interpreting and explaining complex rules, regulations, procedures and technical information.
- Establishing, maintaining, researching and verifying customer information and computer-produced customer data and files.
- 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.
- Interviewing, obtaining accurate information and successfully assisting a wide variety of individuals from diverse socio-economic, ethnic and cultural backgrounds, who may be physically, emotionally, or mentally impaired or distressed.
- 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.
- 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:**

- On a continuous basis, know and understand all aspects of the job; understand, retain, and explain complex program information; intermittently analyze complex policies and directive, identify, and interpret technical and numerical information; explain program regulations and procedures.
- Give full attention to what other people are saying, taking time to understand their points, asking clarifying questions as needed, and avoid interrupting at inappropriate times.
- Maintain composure and perform calmly, purposefully, and appropriately in challenging situations.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Process a high volume of work amid interruptions.
- Process general mathematical computations quickly and accurately.

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- 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.
- Act 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 to human service benefits including food assistance, case assistance, medical care, in-home supportive services and/or veteran services.
- Detect, evaluate, and act on potential fraudulent situations.
- Respect the right of privacy and maintain confidentiality of customers.
- Manage customer interactions professionally, proficiently, and with clear communication.
- 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 and includes continuous contact with department staff and clients.
- On occasion, may be required to enter private homes to make family home visits for the purpose of assisting clients with completing forms and filing documents.
- May be subject to disruptive or confrontational people.

### **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.

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- When assigned to Veterans' Services, obtain certification from the State of California Department of Veterans Affairs to present claims to the United States Department of Veteran Affairs pursuant to Title 38, Code of Federal regulations (CFR) 14.629 within one year of assignment and maintain annually thereafter.
- 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:**

- Will be required to work a flexible schedule to include evening and weekend hours, depending on assignment.
- Must successfully complete an extensive and thorough background investigation, w h i c h 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(s) may be expected to perform job-related duties other than those contained in this document.**

Health & Human Services Approval:  
Date:

Signature: \_\_\_\_\_

Human Resources Analyst Approval:  
Date:

Signature: \_\_\_\_\_

EEOC: F  
WC: 8810

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