

## CLASS SPECIFICATION



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

**ESTABLISHED:** Circa 1996  
**REVISED:** June 2013

### **JOB SUMMARY:**

Perform quality control work by reviewing previously-processed eligibility and grant determinations; resolve problems; train staff in new and revised procedures and may provide lead direction to eligibility staff on a relief or day-to-day basis; perform the full range of eligibility duties, such as determining eligibility of applicants and recipients for multiple public assistance programs through interactive interviewing, as well as fact gathering and initiating and processing casework through an automated system; provide quality customer service and performs related work as assigned.

This is the advanced-journey lead/specialist paraprofessional level in the eligibility social services class series.

### **CLASS CHARACTERISTICS:**

This position reports directly to an Eligibility Supervisor. This class is distinguished from an Eligibility Supervisor in that the latter is the full supervisory class in this eligibility worker series.

### **EXAMPLES OF DUTIES:**

#### **Essential:**

- Develop and prepare training materials for eligibility workers; orients employees; personally train staff in new and revised procedures and regulation changes in group and individual settings; update procedure manuals as required.
- Act as a resource in assisting eligibility staff in understanding and utilizing the automated system(s) associated with the administration of public benefits; answer questions, assist with resources as appropriate to resolve usage errors and develop solutions.
- Review eligibility determinations previously made to ensure that appropriate rules, regulations and procedures have been applied in a consistent manner; works with eligibility staff to improve consistency of determinations.
- Regularly assigned the most difficult and complex cases; perform the full range of eligibility duties; acts as a floater to fill for any eligibility staff on a relief or as needed basis.
- Perform interactive interviews to elicit eligibility information and identify the need for possibly multiple 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 or individual.
- Analyze customer's financial, employment, family and personal information to determine initial or continuing eligibility for multiple aid programs.
- Interpret and explain regulations, rules and policies to customers; apprise customers of their rights, responsibility and eligibility for program participation.
- 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.
- Initiate total-household assistance cases through automated means; review computer-produced documents for accuracy.
- Enter and retrieve numerical and narrative data and issue income maintenance benefits from an automated computer system.
- Organize caseload and assist others in managing caseloads so that required case documents are updated and filed properly within specific time limits established by regulation and local policy.
- Prepare reports, correspondence and other written materials.

#### **Important:**

- Comply with Federal, State and County facility and computer security policy and procedures, and Medi-Cal Personally Identifiable Information rules and regulations.
- Use standard office equipment, including a computer in the course of the work.
- Read and interpret computer print-outs and information on computer screen.
- May be required to drive a personal or County-owned motor vehicle.
- May make occasional home/field visits in connection with assignments.

### **ASSIGNMENT SPECIFIC DUTIES (in addition to the above)**

### **Customer Service Call Center**

- Measure performance utilizing an electronic monitoring system, to review and assess a broad, representative sample of incoming customer calls, internally elevated calls, outgoing customer calls and written responses to customer inquiries to ensure timely and efficient service.
- Bring issues identified during performance measurement to the attention of the Eligibility Supervisor and recommend options for improving customer service and meeting service standards.
- Answer incoming calls and assist customers in regard to eligibility and health care coverage options; and provide individualized customer service of a high-standard professional level.
- Record customer interactions, recording details of inquiries, complaints or comments as well as relevant information for determining benefits and any actions taken.
- 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.

### **EMPLOYMENT STANDARDS:**

#### **Knowledge of:**

- Techniques for working successfully with other employees in a lead capacity.
- Principles and practices of technical and functional supervision and training.
- Goals and purposes of public social service programs.
- Automated systems applications related to social services work.
- Program eligibility requirements and regulations for a variety of human services programs.
- Techniques for performing quality control on eligibility determinations.
- 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.

#### **Skill in:**

- Planning, directing and reviewing the work of others on a project or day-to-day basis
- Providing complex human services programs and community resource support for programs provided by the County.
- Interpreting, applying and explaining complex rules, regulations, procedures and technical information.
- Using initiative and independent judgment within established procedural guidelines.
- Resolving complex customer problems within procedural guidelines.
- Using automated technology to correct data and avoid over-payments and over-issuance of benefits.
- Training others in work procedures, in individual or classroom settings.
- Communicating clear and accurate information regarding customers to human services workers.
- Establishing, maintaining, and researching customer files.
- Interviewing and obtaining accurate information from a difficult customer population.
- Interpreting financial information and performing accurate mathematical calculations.
- Preparing clear and accurate notes, reports, correspondence and other written materials.
- Entering data into a computer system and utilizing an automated eligibility system with accuracy.
- Dealing successfully with a variety of individuals from various socio-economic, ethnic and cultural backgrounds, often when they are distraught or in high-stress personal situations.
- Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
- Identifying customer needs, delivering accurate and consistent information and providing timely and efficient 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

ensuring timely and efficient service.

**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.
- Maintain confidentiality of case information learned through course of the work.
- Establish and maintain effective working relationships with those contacted in the course of the 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 the customer's eligibility for one or more categorical public benefits including, but not limited to, food stamps, cash assistance and medical care.
- Detect and evaluate situations in which welfare fraud is suspected or recognized, make a timely referral to Special Investigations Unit, and/or guide eligibility staff through process of welfare fraud referral.
- 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.

**Customer Service Call Center Assignment Specific Abilities (in addition to the above)**

- 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 to ensure excellent customer service.
- 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 for prolonged periods of time; 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; stamina to maintain attention to details for extended periods of time; 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.

**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.

**Special Requirements:**

- Must successfully complete an extensive and thorough background investigation which includes Live Scan fingerprinting.
- If assigned to the Customer Service Call Center, will be required to work a flexible schedule to include evening and weekend hours.

**Education and Experience:**

**MINIMUM:** Graduation from high school and two (2) years experience equivalent to the County's class of Eligibility Technician.

**PREFERRED:** In addition to the minimum, two years of college (60 semester units) with major coursework in a field related to human services, or accounting/business, and three (3) years experience equivalent to the County's class of Eligibility Technician. Customer service call center experience is desirable.

**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:  
Suzanne Nobles  
Date:

EEOC: F  
WC: 8810.1

Human Resources Approval: Iva Seaberg  
Date:

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

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