



**CALHR**  
invites applications for the position of:

## **Eligibility Specialist Trainee/I/II**

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<b>SALARY:</b>	See Position Description
<b>DEPARTMENT:</b>	Mono County Department of Social Services
<b>OPENING DATE:</b>	09/29/22
<b>CLOSING DATE:</b>	Continuous

### **POSITION INFORMATION:**

#### **Salary Information:**

**Eligibility Specialist Trainee 19.44-23.65 an hour**

**Eligibility Specialist I: 21.46-26.09 an hour**

**Eligibility Specialist II: 23.69-28.79 an hour**

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.

The Eligibility Specialist Trainee is the classroom and on-the-job trainee level in the Eligibility Specialist series where emphasis is on learning the basic regulatory and statutory requirements of multiple public assistance programs. Incumbents may receive classroom instruction and/or on-the-job training prior to being assigned casework or tasks. Once incumbents are placed in a unit, they will continue to participate in on-the-job training and may be assigned a variety of duties, including some casework/tasks which will assist them in learning to determine initial and continuing eligibility for one or more public assistance programs. Incumbents work under close supervision to complete initial case functions as they continue to learn procedures and complex regulations and acquire the ability to apply the regulations during the training period. Trainees are given the opportunity to perform increasing levels of eligibility determination to prepare them for the entry-level Eligibility Specialist I classification. Incumbents are expected to progress to the entry-level Eligibility Specialist I upon satisfactory completion of one year as a trainee. Use of the Eligibility Specialist Trainee classification is optional, at the discretion of each County.

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.

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 Trainee classification typically receive supervision from an Eligibility Supervisor and may receive lead direction from an Eligibility Specialist III. 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.

## **EXAMPLES OF DUTIES:**

### **Duties may include, but are not limited to, the following:**

(Duties are performed at the trainee level, where the incumbent is learning to perform the duties and progress as more experience is gained)

- 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 a trainee.

### **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:**

### **Eligibility Specialist Trainee:**

**Pattern 1:** Two (2) years of full-time clerical experience involving public contact, interviewing, math computations, completion of forms or eliciting information from the public;

**OR**

**Pattern 2:** One year of full-time experience determining eligibility for loans, financial assistance, unemployment or veterans benefits, or publicly or privately funded health, counseling or social services programs;

**OR**

**Pattern 3:** Completion of sixty (60) semester or ninety (90) quarter college units.

Qualifying experience or education may be combined in order to meet the above requirements.

When combining education and experience; fifteen (15) semester units or twenty-two and a half (22.5) quarter units equals six months of experience.

### **Eligibility Specialist I:**

**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.

Qualifying experience or education may be combined in order to meet the above requirements. When combining education and experience; fifteen (15) semester units or twenty-two and a half (22.5) quarter units equals six months of experience.

**Eligibility Specialist II:**

**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.

**SUPPLEMENTAL INFORMATION:**

***ELIGIBILITY SPECIALIST  
APPLICANT INFORMATION REGARDING THE NATURE OF WORK PERFORMED***

**INTRODUCTION**

Submitting an application is the first step toward a valuable and rewarding career as an Eligibility Specialist. We offer this additional information in an effort to provide you with a clear understanding of the nature of the job and its requirements. Please take the time to review this information prior to submitting an application.

**NATURE OF WORK**

The primary function of an Eligibility Specialist involves determining the eligibility of applicants and recipients for public assistance programs. Eligibility work is performed in an office environment, not in the field, and includes processing of a broad range of paperwork and entering information into a computer-based eligibility system with very time sensitive agency and legal deadlines. Individuals with bank teller experience are often well suited to Eligibility Specialist positions, as are those who have determined eligibility for loans, etc. Typical duties of an Eligibility Specialist include:

- Acting as the first contact for individuals seeking public assistance
- Interviewing applicants and recipients (clients) to obtain and verify information needed to determine initial and/or ongoing eligibility for public assistance. This often requires obtaining information in difficult and/or emotional situations on issues such as earnings and financial obligations and/or parental status and living arrangements and maintaining control of the interview if the client becomes hostile or angry over the interview questions.
- Learning numerous state and federal program regulations and specific county practices through intensive training prior to full case assignment and ongoing training thereafter. The work of an Eligibility Specialist is highly regulation driven with ongoing reliance on regulations.
- Instructing clients in the completion of various forms and reviewing applications for completeness and consistency.
- Explaining program benefits, requirements and procedures, including eligibility factors, to public assistance clients.
- In some cases, visiting clients in their homes for the purpose of obtaining and verifying information.
- Determining program eligibility in accordance with current regulations using the computer-based eligibility system.
- Researching questionable information provided by an applicant until satisfactory explanations regarding eligibility status are confirmed.
- Reporting cases where fraud is suspected.
- Advising clients of deadlines, timeframes, and necessary actions to be taken.
- Working with clients who often do not take the necessary actions within the required timeframe.
- Establishing and maintaining multiple case files through regular updating and review. Documenting all communications and contacts with clients.

- Planning and organizing a large caseload, ensuring that accuracy levels are maintained and that cases are processed within the specified timeframes set by federal and state regulations.
- Preparing system generated documents necessary to initiate, continue, and/or modify public assistance.
- Computing and authorizing grant amounts based on financial and family status. Computing CalWORKs budgets, Medi-Cal budgets, General Assistance budgets, and CalFresh in order to calculate grants.
- Reviewing and explaining to clients public assistance amounts and authorizing payment of monthly benefits.
- Providing information and making routine referrals to resources available through the County and within the community for clients desiring or needing services. In some cases, Eligibility Specialists also refer clients to and communicate with Social Workers and other staff to coordinate family services. Note: An Eligibility Specialist's responsibilities do not include social service casework. An Eligibility Specialist is not responsible for working with clients to attempt to resolve their personal or social problems.
- Keeping up to date on changes in rules, laws, procedures, etc. that affect processing timelines.
- Eligibility Specialists are expected to handle a high volume of work which is deadline driven. Applicants must be able to prioritize, plan and project their work, but at the same time be flexible to changes at any moment, such as unscheduled visits from clients.

It is important to understand that the actions you take as an Eligibility Specialist affect the lives of clients and their families.

As an Eligibility Specialist you may be required to take actions that conflict with your own values. An Eligibility Specialist must be able to accept clients' differences and interact with them in a non-judgmental manner. Some of the controversial issues encountered in an Eligibility Specialist environment include:

- Granting Medi-Cal for clients requesting abortions
- Granting Medi-Cal to minors without their parent's knowledge
- Clients with AIDS and other communicable diseases
- Applicants/recipients involved in Welfare fraud.
- Clients who have substance abuse dependency
- Clients who are domestic violence victims
- Clients who are mentally ill
- Clients with felony convictions
- Homeless individuals and families
- Elderly and/or disabled clients placed in long-term care facilities
- Mandatory report of child and adult abuse
- Clients whose life style, culture and/or values may be significantly different than your own

**ADDITIONAL INFORMATION:**

- The ability to speak, read and write Spanish in addition to English would be helpful in this position.
- A valid driver's license may be required at the time of appointment and employees may also be required to drive their own car, provide proof of car insurance, and a DMV clearance. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.
- Applicants for positions within the Department of Social Services are subject to a criminal history background check.
- Government agencies accessing US government information, which include federal tax information must ensure that background investigation requirements for all agency employees and contractors that have access to federal tax information are consistent to the IRS background investigation requirements for access to federal tax information. A background check may be required if the position requires access to these types of records. Background requirements consist of three components which include, fingerprinting, citizenship verification and local law enforcement checks.
- Applicable agencies must conduct investigation during time of hire and ensure a reinvestigation is conducted 10 years from the date of the previous background investigation for each employee that has access to federal tax information.

**VETERAN'S PREFERENCE**

If you would like to request Veteran's preference points as part of the application packet, please submit a copy of your DD-214 form. Applicants must email a copy of the DD-214 form to [mssprogram@calhr.ca.gov](mailto:mssprogram@calhr.ca.gov) by the application deadline listed on the job bulletin.

**SPECIAL TESTING ARRANGEMENTS**

Special testing arrangements may be made to accommodate applicants for disability, military, or religious reasons. If you require such arrangements, please contact CalHR at [mssprogram@calhr.ca.gov](mailto:mssprogram@calhr.ca.gov) or 916-323-2785 upon notification that your application has been approved. Documentation from medical, military, school, or church officials outlining the accommodation request must be received by our office a minimum of five business days prior to a scheduled examination.

**ABOUT MONO COUNTY**

Mono County, with a population of approximately 14,000, is set on the eastern slopes of California's Sierra Nevada mountain range. The Town of Mammoth Lakes, with a population of approximately 7,093 is the most populated area of Mono County. The County Seat is located in picturesque Bridgeport located 360 miles north of Los Angeles and 182 miles southeast of Sacramento. Mono County is a rare environment of natural contrasts: soaring granite peaks and spacious desert vistas, quiet lakes, bubbling hot springs and cold mountain streams, winter snows and sunny summer skies. The County offers numerous recreational opportunities for the outdoor enthusiast.

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APPLICATIONS MAY BE FILED ONLINE AT:  
<https://www.governmentjobs.com/careers/mss>

Position #MSS03034  
ELIGIBILITY SPECIALIST TRAINEE/I/II  
MW

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