

# **Eligibility Worker I – Merit**

## **General Description**

Determines the eligibility of applicants and recipients for public assistance programs through interactive interviewing and fact gathering; maintains current knowledge of program regulations and procedures necessary for multi-program caseload administration; initiates and processes casework through an automated system; identifies needs and makes appropriate referrals for health, social, and/or employment services; and performs related work as required.

Working under close supervision, Eligibility Worker I is the entry/trainee level in the Eligibility Worker series. Employees in this class receive in-service training, and are given detailed instructions in the performance of routine duties related to eligibility for public assistance programs and caseload administration. As requisite skills and knowledge are developed, greater independence and the full scope of responsibility are exercised. Employees are expected to promote to Eligibility Worker II after one year of satisfactory performance at the trainee level.

## **Supervision Exercised and Received**

Incumbents in the Eligibility Worker I/II classification receive supervision from an Eligibility Supervisor, and may receive lead direction from an Eligibility Worker III.

## **Minimum Qualifications**

Two years of experience performing clerical duties;

OR

One year of experience determining eligibility for loans, financial assistance, unemployment, or veterans benefits, or publicly or privately funded health, counseling or social services,

OR

Completion of 60 semester or 90 quarter college units.

Some positions may require possession of special language and culture skills as a bona fide qualifications standard. In these cases, candidates must demonstrate that they possess the required skills.

## **Work Performed Typical Duties:**

Duties may include, but are not limited to, the following. For Eligibility Worker I, duties are performed at the trainee level:

- Performs interactive interviews to elicit eligibility information and identify need 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.
- Ensures accuracy and completion of application and declaration forms.
- Resolves discrepancies by securing documentation, medical records, and confirmation from other agencies.
- Initiates a total-household assistance case.
- Enters and retrieves numerical and narrative data, and issues benefits from an automated computer system.

- Reads and interprets computer printouts and information on computer screens.
- Prepares correspondence and reports.
- Organizes caseload so that necessary case records and documents are processed and updated within specific time limits established by regulation and local policy.
- Performs related duties as assigned.

## **Employment Standards**

### **Knowledge of:**

Note: The level and scope of the knowledge and skills listed below are related to job duties as distinguished between the two levels in the Definition section.

- General goals and purpose of public social services programs.
- Techniques of interviewing and information gathering.
- Computer terminology and computer keyboard arrangement.
- Modern office practices, methods, and procedures.
- Basic record keeping practices and procedures.
- Basic mathematics.

### **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.
- Enter data accurately into a computerized system.
- Navigate through computer screens and complete and review basic computer documents and other forms.
- 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.
- 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 and cultural backgrounds.
- Establish and maintain cooperative working relationships with the public and staff.
- Use computers and related software packages.
- Follow written and oral directions and instructions.

## **Other Information**

Some positions in this classification may require possession of a valid California driver's License. Employees who drive on County business to carry out job-related duties must possess a valid California driver's 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.

## **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 Worker. 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 Worker 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 Worker positions, as are those who have determined eligibility for loans, etc. Typical duties of an Eligibility Worker 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 Worker 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 CalWORK's budgets, Medi-Cal budgets, General Assistance budgets, and Food Stamps 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 Workers also refer clients to and communicate with Social Workers and other staff to coordinate family services. Note: An Eligibility Worker's responsibilities do not include social service casework. An Eligibility Worker 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 Workers 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 Worker affect the lives of clients and their families.

## **Controversial Issues**

As an Eligibility Worker you may be required to take actions that conflict with your own values. An Eligibility Worker 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 Worker 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