

**DRAFT**  
**ELIGIBILITY WORKER III**

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Class specifications are not intended to reflect all duties performed within the job.*

**DEFINITION**

Under direction, independently performs a variety of technical, complex, and specialized duties in support of a variety of public assistance, medical, and/or employment programs; determines initial eligibility for three or more eligibility programs; assumes responsibility for assignments in the more complex programmatic areas of the work and/or provides lead direction, training, and work review to staff; reviews eligibility determinations and case actions to ensure work quality and adherence to applicable rules and regulations for all aid programs; troubleshoots and provides technical assistance and support on escalated cases requiring advanced knowledge of programmatic rules and regulations and system functionality; provides technical support and assistance to department eligibility staff and supervisors; and performs related work as assigned.

Although positions within the Eligibility Worker I and II classes are flexibly staffed; positions at the Eligibility Worker III level are filled via competitive recruitment.

**DISTINGUISHING CHARACTERISTICS**

This is the advanced journey-level classification in Eligibility Worker series responsible for performing the most complex work assigned to the series. Assignments may include determining initial eligibility for three or more programs, engaging with clients to identify barriers to self-sufficiency and developing plans to remove those barriers; providing enhanced information and referral services and working with clients to ensure that connections are made; coordinating client appointments with internal and external organizations; organizing or coordinating community outreach events, and/or providing lead direction and training to staff. Incumbents regularly work on tasks that are varied and complex, requiring considerable discretion and independent judgment. Positions in the classification rely on experience and judgment to perform assigned duties. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to complete assignments. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements.

This class is distinguished from the higher level Supervisor in that the latter is the full supervisory-level class within the series responsible for planning, organizing, supervising, reviewing, and evaluating the work of assigned staff.

Receives direction from assigned supervisory and/or management personnel. Some positions exercise technical and functional direction over and provide training to less experienced staff.

**TYPICAL TASKS**

Duties may include but are not limited to:

- Performs a variety of technical, complex, and specialized duties in support of various and multiple public assistance, medical, and/or employment programs, requiring the interpretation, understanding,

and appropriate application of department policies and procedures and all aid program rules and regulations.

- Provides consultation and lead direction to staff. Conducts formal and/or informal audits of case actions and eligibility determinations processed by eligibility staff; ensures the appropriate application of all aid program rules, regulations, and processing timeframes, and compliance with County and department policies and procedures; computes and verifies the accuracy of grants, entitlements, and/or medical cost-sharing provisions.
- Schedules appointments and conducts interactive, fact-gathering interviews; interprets and explains program rules and regulations governing eligibility, grants, processing timeframes, methods of payment, and legal rights and responsibilities to applicants and recipients.
- Serves as subject matter expert and escalation point on eligibility programs' policies, processes and procedures for designated staff.
- Identifies discrepancies in information reported by clients and/or actions taken by eligibility staff; secures documentation, records, and confirmation/verification from case files and other entities; evaluates cases for potential fraud and/or worker errors; reports to supervisor or investigations staff as required.
- Prepares a variety of correspondence, periodic and special reports, including case audit findings, error trends, and recommendations for improvement for supervisory review.
- Requests, records, reviews, and evaluates demographic, financial, and asset verification obtained from applicants and recipients and outside sources; enters and processes data into automated system(s) to determine/review initial/ongoing eligibility and grant entitlements within established timeframes; reviews and ensures the accuracy of the eligibility results, including eligible household members, budgets, and entitlements; identifies any errors in eligibility/grants and troubleshoots and modifies entries to ensure accurate eligibility determinations.
- Processes assigned tasks and case actions, and/or maintains a complex and/or confidential client caseload; ensures appropriate action is taken on reported information/changes in circumstances, voluntary and mandated intermittent and annual reporting, and requests for additional and/or modified programs/services according to program rules and regulations, and timeframes for processing.
- Provides courteous customer service, and accurate information related to department programs/services, eligibility, community resources, and other related requests.
- Coordinates with internal and external agencies to communicate, receive, and verify information, including verification of income/assets, household demographics, time on aid, and inter-county transfers.
- Attends meetings, conferences, workshops, and training sessions; reviews publications and related material to become and remain current on programs, regulations, policies, procedures, and new developments related to all eligibility programs.
- Maintains accurate and detailed records, files, and notes related to case actions and client interactions; updates information, researches discrepancies, and performs data entry; maintains confidential client documentation.
- Performs other related duties as assigned.
- Conducts in-person participant interviews in specialized case review assignments and validates or completes participant supplied data in an online computer system as needed
- Conducts group orientations, training sessions, job search workshops and/or job search counseling
- Provides enhanced information and assistance and/or refers participants and the general public to appropriate county or community services and works with the public and private agencies to develop community resources

## **MINIMUM QUALIFICATIONS**

### **Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Education:

- Possession of a high school diploma, GED equivalency or a high school proficiency certificate.

Experience:

- Four (4) years of increasingly responsible experience determining initial and/or ongoing eligibility for multiple public assistance, medical, and/or employment programs at a level equivalent to the Contra Costa County's class of Eligibility Worker II, with demonstrated competence accurately applying multiple program rules and regulations and identifying and resolving errors and discrepancies in case actions, eligibility determinations, and system output.

Licenses and Certifications:

- Some positions may require possession of a valid California Driver's License, to be maintained throughout employment.

**KNOWLEDGE, SKILLS AND ABILITIES**

**Knowledge of:**

- County and department programs, goals, policies, and procedures.
- Principles of providing functional direction, coaching, and training.
- Principles and practices of leadership.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility, including those governing eligibility determination for diverse public assistance, medical, and employment programs.
- Rules, regulations, policies, and standards related to the evaluation and audit of eligibility determinations and case actions for multiple programs.
- Review and assessment techniques to identify quality assurance issues.
- Principal sources of information required to establish initial eligibility for various/multiple public assistance, medical, and employment programs.
- Methods and techniques to assist and support clients working toward self-sufficiency.
- Principles and techniques of effective interviewing and information gathering.
- Conflict resolution techniques
- Basic arithmetic.
- Record-keeping principles and procedures.
- County, department, and community service providers and resources.
- Record-keeping principles and procedures.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition and grammar.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

**Ability to:**

- Accurately perform specialized, and technical eligibility work using discretion and independent judgment.
- Effectively provide staff leadership and work direction.

- Train others in work procedures, processes, and technical skill.
- Conduct detailed and precise case reviews and audits based on various programs' rules and regulations.
- Participate in implementing goals, objectives, practices, policies, procedures, and work standards.
- Effectively represent the department and the County in meetings with governmental agencies; community groups; regulatory organizations; and in meetings with individuals.
- Provide program services to clients with diverse needs in a sensitive manner.
- Understand, interpret, explain, and apply all applicable federal, state, and local laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Gather, record, and accurately evaluate information and data necessary to determine eligibility for various public assistance, medical, and employment programs.
- Perform accurate arithmetic calculations and ensure the accuracy of grant entitlements.
- Provide appropriate and accurate information, resources, and referrals.
- Maintain confidentiality of sensitive personal information and other matters affecting prospective and/or current applicants.
- Prepare clear and concise reports, correspondence, case review documentation, and other written materials.
- Maintain accurate files and records.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Effectively use computer systems, software applications relevant to work performed and modern business equipment to perform a variety of work tasks,
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Established: