



CaIHR  
**Eligibility Specialist Trainee/I/II**

<b>SALARY</b>	See Position Description	<b>LOCATION</b>	Alturas
<b>JOB TYPE</b>	Full-Time	<b>JOB NUMBER</b>	MSS04395
<b>DEPARTMENT</b>	Modoc County Department of Social Services	<b>OPENING DATE</b>	03/22/2024
<b>CLOSING DATE</b>	Continuous		

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## Position Information

### **SALARY RANGES:**

**Eligibility Specialist Trainee: \$2,977.00 - \$4,620.00 per month**

**Eligibility Specialist I: \$3,129.00 - \$4,856.00 per month**

**Eligibility Specialist II: \$3,288.00 - \$5,101.00 per month**

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.

### **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.

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 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:**

*(For the Eligibility Specialist Trainee, duties are performed at the trainee level, where the incumbent learns to perform the duties and progresses as more experience is gained. For the Eligibility Specialist I, duties are performed at the entry-level.)*

- 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 distinguished between the three levels in the Position Information section.

### **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 (1) 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 (1) 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

One (1) year full time experience in an Eligibility Specialist I classification in an Interagency Merit System (IMS) County;

**OR**

Two (2) years of full time experience determining eligibility for public assistance programs in a public human services agency.

***If you are using education to meet the minimum qualifications, you must attach your transcripts to your application. Applicants with foreign transcripts must provide a transcript evaluation that indicates the number of units to which the foreign course work is equivalent. Transcripts and evaluations may be unofficial; official transcripts may be required***

***upon appointment. Please redact birthdates and social security numbers.***

## **Supplemental Information**

- The ability to speak, read and write Spanish in addition to English *is optional*.
- Some positions in this classification may require possession of a valid California driver license. Employees who drive on County business to carry out job-related duties must possess a valid California driver 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.
- Position may require pre-employment drug testing, physical and fingerprinting for a background investigation.
- This position is full-time at 37.5 hours per week.
- 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. Background checks are required and must be repeated every 5 years. Background requirements consist of three components which include, fingerprinting, citizenship verification and local law enforcement checks.

## **EXAMINATION INFORMATION**

### **TRAINING & EXPERIENCE EXAMINATION – WEIGHTED 100%**

The Training & Experience Examination is designed to elicit a range of specific information regarding each candidate's knowledge, skill, abilities, and potential to effectively perform the duties relative to the classification. Responses to the questionnaire will be assessed based on pre-determined rating criteria. All applicants must complete the entire examination to receive a score. In order to obtain a position on the eligible list, candidates must receive a minimum rating of 70% on the examination.

Examination administration and processing time is approximately two weeks after the closing date of the job bulletin.

## **ELIGIBLE LIST INFORMATION**

A departmental open eligible list will be established for the county of Modoc. The list will be utilized for 12 months after it is established unless the needs of the service and conditions of the list warrant a change in this period.

At the discretion of Modoc County Social Services and with the approval of Merit System Services (MSS), qualified candidates certified to the eligible list established by this exam may be appointed to the Eligibility Specialist Trainee, Eligibility Specialist I, or Eligibility Specialist II level if the appointee meets the minimum requirements.

## **RETEST PERIOD**

Once you have taken the examination, you may not retest for SIX (6) MONTHS from the established eligibility date.

## **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 916-323-2360 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.

## **APPLICATION DOCUMENTS**

If you are using education to meet the minimum qualifications, you must attach your transcripts to your application. Applicants with foreign transcripts must provide a transcript evaluation that indicates the number of units to which the foreign course work is equivalent. Transcripts and evaluations may be unofficial; official transcripts may be required upon appointment. Please redact birthdates and social security numbers.

## **GENERAL INFORMATION**

MSS reserves the right to revise the examination plan to better meet the needs of the recruitment if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all competitors will be notified.

If you meet the requirements stated on this bulletin, you may take this examination. Your performance in this examination will be rated against predetermined rating criteria. All competitors who pass will be added to the eligible list. Meeting the entry requirements does not assure success in the examination or placement on the eligible list.

General Qualifications: Applicants must possess essential personal qualifications including integrity, initiative, dependability, good judgement, the ability to work cooperatively with others, and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. As part of the hiring process, a background investigation may be required.

## **EQUAL EMPLOYMENT OPPORTUNITY**

The Merit System Services program is committed to equal employment opportunity for all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.

## **ABOUT MODOC COUNTY**

Modoc County is a geographically diverse area in the northeastern corner of California and borders both Oregon and Nevada. The City of Alturas is the county seat and the only incorporated city in the County. Federal land comprises much of Modoc County, with employees from the US Forest Service, Bureau of Land Management, National Park Service, Bureau of Indian Affairs, and the US Fish and Wildlife Service assigned there. These federal operations account for a significant part of the County's economy. Modoc County is home to the Medicine Lake Highlands, which is the largest shield volcano on the US West Coast. You'll also find areas of lava flows, cinder cones, juniper flats, pine forests, and seasonal lakes, nearly one million acres of the Modoc National Forest, as well as hot springs and lava caves, which are common to the area, and geothermal energy resources.

*This job bulletin will not be available online after the application deadline. Please print a copy for your records.*

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### **Agency**

CalHR

### **Department**

Modoc County Department of Social Services

### **Address**

CalHR, Attn: Merit System Services  
1515 S Street, North Building, Suite 500  
Sacramento, California, 95811

### **Phone**

### **Website**

## Eligibility Specialist Trainee/I/II Supplemental Questionnaire

### \*QUESTION 1

The Minimum Qualifications for Eligibility Specialist Trainee list several patterns under which an applicant may qualify, please place a check next to the pattern under which you believe you might qualify (you may check more than one):

- Two (2) years of full-time clerical experience involving public contact, interviewing, math computations, completion of forms or eliciting information from the public.
- 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.
- Completion of sixty (60) semester or ninety (90) quarter college units.
- None of the above.

### \*QUESTION 2

The Minimum Qualifications for Eligibility Specialist I list several patterns under which an applicant may qualify, please place a check next to the pattern under which you believe you might qualify (you may check more than one):

- One year full-time experience in an Eligibility Specialist Trainee classification in an Interagency Merit System (IMS) county.
- 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.
- Two (2) years of full-time experience determining eligibility for health programs, loans, financial assistance, unemployment, or other benefits.
- Four (4) years of full-time clerical work involving public contact, interviewing, math computations, completion of forms or eliciting information from the public.
- Graduation from an accredited four-year college or university.
- None of the above.

### \*QUESTION 3

The Minimum Qualifications for Eligibility Specialist II list two patterns under which an applicant may qualify, please place a check next to the pattern under which you believe you might qualify (you may check more than one):

- One (1) year full time experience in an Eligibility Specialist I classification in an Interagency Merit System (IMS) County.
- Two (2) years of full time experience determining eligibility for public assistance programs in a public human services agency.
- None of the above.

### \*QUESTION 4

**Please read: One or more of the patterns of the Minimum Qualifications require successful completion of specific units, credits, coursework OR a degree.**

**If you have completed *any* college or university courses, you must attach your college transcripts to this application.**

**Have you attached copies of your transcript(s) to this application?**

- Yes
- No

\* Required Question