

**COUNTY OF SOLANO**  
**CLASS SPECIFICATION**  
**ELIGIBILITY BENEFITS SPECIALIST I & II**  
Effective Date: 01/13/2021

**CLASS SUMMARY:**

**Eligibility Benefits Specialist I:** Under close supervision, receives training and on-the-job experience to learn to apply regulations and procedures to determine eligibility for multiple public assistance programs in accordance with established procedures, and performs related duties as required.

**Eligibility Benefits Specialist II:** Under supervision, applies regulations and procedures to determine eligibility for multiple public assistance programs in accordance with established procedures, and performs related duties as required

**DISTINGUISHING CHARACTERISTICS:**

These classes are distinguished from the Employment Resources Specialist I/II classes in the scope of assigned duties and responsibilities. The Eligibility Benefits Specialist I/II classes performs duties in primarily involving eligibility-only functions while the Employment Resources Specialist I/II classes performs duties in both eligibility and employment services functions. The Eligibility Benefits Specialist I/II classes are distinguished from the Eligibility Benefits Specialist III class in that the latter class functions as a unit lead worker and/or in a specialized eligibility assignment.

**Eligibility Benefits Specialist I:** This is the entry level of this series. Incumbents attend training sessions and work under close supervision to learn regulations, work procedures, forms and public assistance program requirements. After the initial orientation and training period, employees are placed in a unit where on-the-job training experience is gained to attain and demonstrate the level of competency in assigned duties necessary for promotion to the full working level of Eligibility Benefits Specialist II. An incumbent must demonstrate the necessary knowledge, skill and ability to promote to the Eligibility Benefits Specialist II within eighteen (18) months of appointment. The Eligibility Benefits Specialist I class is distinguished from the Eligibility Benefits Specialist II by the need for immediate supervision and assignment of a limited, less complex set of job duties.

**Eligibility Benefits Specialist II:** This is the full journey working level in the series. Incumbents are expected to independently perform the full range of multi public assistance benefit eligibility determination duties while managing related case records independently and under general supervision.

## **SUPERVISION RECEIVED AND EXERCISED:**

- Supervision is provided by the supervisor of the work unit.

### **AND**

- No supervision is exercised over others.

**ESSENTIAL DUTIES:** This class specification represents the core area of responsibilities; specific position assignments will vary depending on the needs of the department.

- Interviews clients to assist them in the completion of application and declaration forms upon which eligibility decisions are based; elicits information from clients on parental status, income, property (real and personal), financial obligations, medical condition, and other resources.
- Interprets and explains regulations, rules, and policies to clients; apprises clients of their rights, responsibilities and eligibility for program participation.
- Reviews application documents for completeness and consistency; requests clients provide additional information and documents to resolve discrepancies in applications; initiates requests for information related to eligibility determinations from outside sources such as banks, insurance companies, other public agencies and county departments; evaluates all information obtained against complex, multiple aid program regulations to assess initial eligibility for public assistance.
- Establishes client household budget based on type of assistance; computes amount of grant authorized and performs other required calculations based on established procedures.
- Handles crisis situations by authorizing benefits within specific guidelines or makes appropriate referrals to other staff and community resources for immediate services and assistance.
- Assists client with need for other services and refers client to other community resources for other assistance.
- Identifies and refers clients in need of other social behavioral, employment, mental health, substance abuse, or other services to other department staff or community resources.
- Analyzes changes in financial, employment, family, and personal information to determine and authorize continuing eligibility for multiple aid programs.
- Inputs necessary information into automated systems; organizes caseload and takes required action with specific time limits established by regulation and local policy.
- Maintains case record files, modifies employment plan and eligibility files as necessary, and monitors client compliance with program standards and agreements.
- Consults with and coordinates case management with other staff and service providers.
- Identifies suspected fraud and makes referrals to investigation.
- Identifies need for and arranges for client work registration and other basic employment activities required as a condition for receipt of public assistance benefits.
- Performs other duties of a similar nature or level as assigned.

**EDUCATION AND EXPERIENCE:**

**Eligibility Benefits Specialist I:**

**Education:** High School Diploma, GED, or equivalent;

**AND**

**Experience:** One (1) year of full-time experience in public contact work which has included interviewing the public and/or clients and explaining rules and regulations. (Typical experience may be gained by processing claims for financial assistance, loans, unemployment insurance, veterans' benefits, health benefits, or other benefits where knowledge of a variety of rules and regulations are required.)

**OR**

Two (2) years of full-time clerical experience, which included substantial public contact for the purposes of gathering, explaining or clarifying information.

**OR**

Completion of 60 semester or 90 quarter units from an accredited college or university preferably in general education, business, finance, social science, or closely related field may be substituted for the required experience.

**Eligibility Benefits Specialist II:**

Six (6) months of experience performing duties equivalent to an Eligibility Benefits Specialist I (Eligibility Worker I) in a California County Department of Social Services, or 13 full pay periods as an Eligibility Benefits Specialist I with Solano County. The experience must have been within the last two (2) years.

**LICENSING, CERTIFICATION AND REGISTRATION REQUIREMENTS:**

- Applicants are required to possess a valid California Driver's License, Class C.

**Note:** The driver's license must be kept current while employed in this class.

**REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:**

**Eligibility Benefits Specialist I**

**Knowledge of:** Techniques for interviewing and gathering information from a varied population; mathematics sufficient to interpret client income and expense information to calculate benefits within program requirements; standard office practices and procedures, including operation of standard and automated office equipment; record keeping principles and practices; techniques for dealing with a variety of individuals from various socio-economic, ethnic and cultural backgrounds; and basic computer applications related to the work.

**Skill and/or Ability to:** Interpret narrative information from tables and forms; perform calculations and computations; communicate effectively in oral and written form; communicate effectively and professionally with people of diverse socio-economic backgrounds and cultures; communicate with hostile and emotionally upset clients.

## **Eligibility Benefits Specialist II**

**Knowledge of:** All of the above, and basic eligibility requirements for public assistance programs administered by the agency; specific computer coding, input and interpretation of data related to eligibility programs.

**Skill and/or Ability to:** All of the above, and read and understand complex social services regulations and procedures; apply and explain complex regulations and procedures; route clients to other needed services; the social services programs and community resource provided by the County; communicate clear and accurate information regarding clients to other staff; interpret and explain complex rules, regulations, procedures and technical information; establish, maintain, research, and verify client information and computer produced client data and files; interview and obtain accurate information from a diverse client population; interpret financial information and make accurate arithmetic calculations; prepare clear and accurate notes, reports, correspondence and other written materials; use automated technology to maintain records and files; resolve client problems within procedural guidelines; deal with a variety of individuals from various socio-economic, ethnic and cultural backgrounds, often under adverse and high stress situations.

## **PHYSICAL REQUIREMENTS:**

- **Mobility and Dexterity:** This class typically requires employees to perform the following: stooping, kneeling, reaching, occasional standing, occasional walking, pushing, pulling, fingering, grasping, feeling (i.e. sense of touch), and repetitive motion.
- **Lifting, Carrying, Pushing and Pulling:** Employees in this class will be exerting up to 20 pounds of force occasionally and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects.
- **Vision:** This class typically requires employees to have close visual acuity, with or without correction, to prepare and analyze data and figures, transcribe, view a computer terminal, read, etc. This class requires employees to have depth perception in order to operate a motor vehicle.
- **Hearing/Talking:** This class typically requires employees to perceive the nature of sounds at normal speaking levels with or without correction, and have the ability to receive detailed information through oral communication. Employees in this class are also required to be able to communicate to express or exchange ideas.

## **WORKING CONDITIONS:**

- **Office Work:** Employees in this class will most often be working in an office setting and includes continuous contact with staff and the public; may be required to enter private homes to make family home visits for purpose of investigation.

- Disruptive/Confrontational Human Contacts: Employees in this class may be subject to disruptive or confrontational people, may travel to community areas that are potentially dangerous.

**OTHER REQUIREMENTS:**

- Background Checks: The County may conduct a background check and a reference check on candidates prior to appointment to a position within this class.
- Independent Travel: Incumbents may be required to travel independently, for example, to perform work at other work sites, to attend meetings with other County employees, to attend meetings with community organizations, etc.
- Hours of Work: Incumbents may be required to work weekends, holidays, irregular hours, on-call, and after normal business hours.
- Language Proficiency: Some positions allocated to this class will require the applicant to speak, read and write in a language other than English.

**CLASS HISTORY AND CLASS INFORMATION:**

- Date(s) Revised: July 2002, September 2006, January 2021
- Class Code: 441030/443170