

**Lane Council of Governments  
Job Classification**

**Job Title: Lead Eligibility Specialist**

**Division: Senior & Disabled Services**

**Reports To: Program Supervisor**

**FLSA Status: Non-exempt**

**Range: 13**

**Last Reviewed: September 2007**

**General Statement of Duties**

Under the direction of the program supervisor, provides training on program eligibility and procedures for financial services workers. This includes determining eligibility of senior and disabled persons for financial services programs and completing necessary data entry, forms, and authorizations. Maintains a small caseload of clients in these programs, responds to changes in their circumstances, and addresses their needs within program and agency guidelines.

**Supervision Received**

Work is performed under general supervision and work performance is evaluated through periodic checks and through the adequacy and timeliness of products and services provided and results observed.

**Supervision Exercised**

None.

**Resource Responsibility**

Limited to moderate responsibility for monetary or human resources. Includes final decisions or recommendations regarding correct use of resources with only general checks for reasonableness of actions. Decisions made within policy guidelines.

**Essential Job Functions**

Provides overall orientation and training for new financial services workers related to unit responsibilities.

Provides detailed training in data entry, interpretation and application of regulations, and case work procedures.

Mentors and coaches customer service skills appropriate to agency clients and providers.

Develops desktop resource materials and provides individual and small group training sessions as needed.

Conducts case reviews for quality assurance and skills assessment of new workers.

Works closely with the program supervisor to monitor case load management.

Communicates with S&DS staff, staff of other agencies, medical and service providers, family members and other involved parties to gather information and resolve issues.

Maintains up-to-date knowledge of agency and state rules, regulations, policies and procedures, reviewing manual releases and policy memos as changes and clarifications are made.

**Other Job Functions**

Provides caseload coverage for absent workers.

Primary contact within the unit for troubleshooting data entry and interpretation and application of rules.

Determines eligibility of senior and disabled persons for a variety of federal and state assistance programs, including food stamps, various medical assistance program. Interviews applicants, reviews their applications, and determines financial and other needs, and verifies eligibility factors. Requests medical and psychological records and authorizes administrative examinations.

Enters client data in computer files and authorizes benefits. Narrates case circumstances and agency actions and decisions.

Maintains a caseload of elderly and disabled financial services clients, periodically redetermining eligibility, providing information about and referrals to other agency and community programs and services, accurately updating computer files when information changes, and increasing, reducing or ending benefits when necessary.

Makes occasional home or facility visits to determine program eligibility.

Attends S&DS meetings and local and state training sessions.

Prepares records and reports when necessary to meet program requirements.

Performs other duties as assigned, including backup of essential office functions as needed.

**Working Conditions**

The work is performed primarily indoors, requiring hand/eye coordination in the operation of office equipment. There is occasional travel to other sites for meetings or training, as well as occasional travel to visit clients in homes or facilities, with potential exposure to animals, diseases, unsanitary conditions, and traffic hazards.

### **Knowledge, Skills, and Abilities**

Knowledge of issues, problems, and concerns of elderly and disabled people.

Considerable knowledge of legal requirements, standards, regulations, policies and procedures related to programs for elderly and disabled people.

Considerable knowledge of community resources and services for elderly and disabled people.

Ability to provide effective and accurate training and assessment of technical competency of other employees.

Considerable ability in case load management.

Considerable ability to establish and maintain effective working relationships and communicate effectively with other employees, elderly and disabled people, representatives of other agencies and the general public using tact, courtesy and good judgment.

Ability to maintain accurate, up-to-date records and to prepare reports.

Ability to work with accuracy and attention to detail to meet deadlines.

Ability to understand and execute oral and written instructions, policies and procedures.

Ability to interpret regulations and apply them to case situations.

Ability to operate standard office equipment such as telephones, personal computers, calculator and photocopiers.

Ability to physically perform assigned duties.

### **Education and Experience**

High school diploma or G.E.D. and two years experience as a financial services worker or as a trainer or lead in human service programs, preferably with elderly and disabled people, with demonstrated coaching or leadership ability, or any combination of education and experience that provides the applicant with the skills, knowledge, and ability required to perform the job.

### **Licenses, Certificates, and Other Requirements**

Valid Oregon State driver's license or the ability to obtain reliable transportation to a variety of sites in Lane County.