NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR

The following actions are being posted in accordance with Civil Service Rule 109. In the absence of a protest addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 48
Fiscal Year: 2014/2015
Posted Date: 03/19/2015
Reposted Date: N/A

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Job specification(s) attached.)

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<th>Item #</th>
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<td>2905</td>
<td>Human Services Agency Senior Eligibility Worker</td>
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<td>Eligibility Worker Supervisor</td>
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Protests on an item should be addressed to the Human Resources Director and can be submitted by mail to the City and County of San Francisco, Department of Human Resources, 1 South Van Ness Ave, 4th Floor, San Francisco, CA 94103 or by email to DHR.ClassificationActionPostings@sfgov.org. All protests must be received in writing no later than close of business seven (7) calendar days from the posting date, and must include the posting and item number(s), the basis on which the protest is submitted and identify the affected parties.

For additional information regarding this proposed classification action, please contact Megan Siems, Senior Classification and Compensation Analyst, at (415) 557-4898 or by email at Megan.Siems@sfgov.org.


cc: All Employee Organizations
    All Departmental Personnel Officers
    DHR – Class and Comp Unit
    DHR – Client Services Unit
    DHR – Employee Relations Unit
    DHR – Recruitment and Assessment Unit
    DHR – Client Services Support Services
    Micki Callahan, DHR
    Michael Brown, CSC
    Sandra Eng, CSC
    Linda Cosico, DHR
    Maria Newport, SFERS
    Risa Sandler, Controller/Budget Division
    Devin Macaulay, Controller/ Budget Division
    Theresa Kao, Controller/ Budget Division
    Drew Murrell, Controller/ Budget Division
    Alex Koskinen, Controller/ Budget Division
    E-File
INTRODUCTION
Under general supervision, perform a variety of technical duties in the review and determination of initial and continuing client eligibility for public assistance programs.

DISTINGUISHING FEATURES
This class utilizes the deep class concept and encompasses multiple levels of responsibility from entry through the fully-experienced journey level. Incumbents with little or no experience in the duties of the class perform beginning-level work and perform at increasingly higher levels of responsibility that require a commensurate higher degree of ability and initiative as experience is gained.

Positions in this classification are responsible for carrying out well defined rules and regulations pertaining to various categorical aid programs and explaining them to applicants and the general public. Positions in this class have regular contacts with clients, their relatives, and representatives of outside agencies and the public.

The 2905 Human Services Agency Senior Eligibility Worker is distinguished from the 2903 Hospital Eligibility worker and the 2908 Senior Hospital Eligibility Worker in that classes 2903 and 2908 determine patient eligibility for medical coverage under the terms of various public and private health plans and financial assistance programs. Additionally, the 2905 class is distinguished from the 2913 Program Specialist in that the 2913 class performs higher level technical assignments for eligibility support programs than the 2905 class.

SUPERVISION EXERCISED

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Schedule and interview clients in the offices of the Human Services Agency Department of Social Services, in the client’s home, or hospitals and various institutions.

2. Explain eligibility programs, qualification standards, policy and procedure to clients; assist clients in completion of applications, forms and reports when necessary; review and evaluate applications for completeness and accuracy; prepare client budget to determine eligibility.

3. Apply legal criteria to determine eligibility; provide recommendations regarding financial eligibility for assistance programs; determine eligibility and grant amount according to established policies and procedures; review and determine re-certification.

4. Prepare case records related to client eligibility information and financial assistance received;
update case records; submit required reports.

5. Investigate statements and information received from applicant through the use of telephone or written verifications.

6. Investigate and resolve client problems involving non-receipt of benefits.

7. Review cases with supervisor in assessing the quality of the eligibility determination process and procedure.

8. Compose and prepare correspondence to clients, references, and State agencies; gather statistical data and prepare reports as required.

9. Answer questions and provide information to clients and the general public regarding assigned program area.

10. Refer clients in need of case work services to members of social service staff; may provide limited referrals to resources within the community on matters related to income maintenance; refer clients to appropriate agencies according to established procedures.

11. Perform related duties as required.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: Basic interviewing and investigative skills and techniques; office procedures, methods and computer equipment; and basic mathematics.

Ability to: Learn departmental programs, policies, procedures and terminology; learn principles and procedures of record keeping; learn to interpret and apply pertinent Federal, State, local and departmental laws, rules, regulations, policies and procedures regarding assigned program; learn to plan, organize and prioritize caseload; learn to interview applicants for public assistance and obtain confidential information relative to personal, family, financial, medical or other circumstances of client relating to eligibility; learn to evaluate data and provide recommendations on eligibility of client; maintain accurate records and meet program deadlines; operate a computer terminal and standard office machines; make accurate mathematical computations; type and enter data at a speed necessary for successful job performance; effectively communicate with and elicit information from clients in difficult situations; apply Federal, State, and local Equal Employment, Affirmative Action, and Civil Rights laws, procedures, and regulations; interact and communicate with people from a wide range or cultures; communicate clearly and concisely, both orally and in writing; establish and maintain cooperative working relationships with those contacted in the course of work; learn services offered by related agencies; deal with the general public in a courteous manner; handle difficult situations, maintain confidentiality, be empathetic and demonstrate interpersonal skills and empathy in the course of work.

Knowledge of: Principles and practices of caseload management; Federal, State, local laws, rules, regulations, policies, and procedures regarding assigned program area; services offered.
Title: Human Services Agency Senior Eligibility Worker  
Job Code: 2905

by related agencies; departmental programs, policies, procedures and terminology;

Ability to: Interview applicants for public assistance and obtain appropriate information, often in different languages, or dialects of English; accurately gather record and evaluate data necessary for the determination of eligibility; interpret and apply Federal, State and local policies, procedures, laws and regulations; work independently with minimal supervision

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:  
Sixty (60) semester units or ninety (90) quarter units from an accredited college or university. OR

Experience:  
1. Two (2) years of clerical work experience which includes the following: use of computer applications to input and retrieve information; regular public contact to provide assistance or acquire detailed personal or confidential information; and interpreting and applying rules, regulations and policies; OR

2. One (1) year of experience determining eligibility for health and/or social services programs, loans, financial assistance, unemployment or veterans benefits.

License and Certification: None

Substitution:  
Thirty (30) semester units or forty-five (45) quarter units from an accredited college or university may substitute for one (1) year of the work experience under experience requirement number #1.

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES:

To: 2907 Eligibility Worker Supervisor

ORIGINATION DATE:  

REASON FOR AMENDMENT  
To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.
Title: Human Services Agency Senior Eligibility Worker
Job Code: 2905

BUSINESS UNIT(S): COMMN
INTRODUCTION

Under direction, to-incumbents supervise, assign, review and participate in the work of a unit responsible for the review and determination of initial and continuing client eligibility for a variety of public assistance programs; and to perform a variety of technical tasks relative to the assigned area of responsibility.

DISTINGUISHING FEATURES

This is a first full line supervisor class which assumes responsibility for and participates in the work of a unit responsible for the review and determination of initial and continuing client eligibility for a variety of public assistance programs. Positions in this classification are responsible for explaining and enforcing well-defined regulations and procedures pertaining to public assistance or related programs. Positions have responsibility for supervising the maintenance of case records and related statistics and submitting reports on the activities of the unit. Positions in this class have regular contacts with clients, their relatives, and representatives of outside agencies and the public. The 2907 Eligibility Worker Supervisor is distinguished from the 2909 Hospital Eligibility Supervisor in that the 2907 class is responsible for supervising the determination of client eligibility and certification for reimbursement for various social service programs, while the 2909 class is responsible for supervising the determination of client eligibility for medical coverage under the terms of various private health care plans and public assistance programs including Medi-Cal and Medicare.

SUPERVISION EXERCISED

The 2907 Eligibility Worker Supervisor is responsible for supervising the staff of a unit engaged in eligibility work activities.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Plan, prioritize, assign, supervise and review the work of a unit involved in a public assistance program area responsible for providing for the review and determination of initial and continuing client eligibility for a variety of public assistance programs.

2. Participate in the selection of unit staff; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline procedures.

3. Recommend and assist in the implementation of goals and objectives; establish schedules and methods for providing services; implement policies and procedures.

4. Evaluate operations and activities of assigned responsibilities; recommend improvements and modifications; prepare various reports on operations and activities.

5. Answer questions and provide information to the public; investigate complaints and
Title: Eligibility Worker Supervisor  
Job Code: 2907

recommend corrective action as necessary to resolve complaints.

6. Review and evaluate staff work in determining financial eligibility for assistance programs; verify eligibility and financial assistance levels according to established policies and procedures; review completed cases with respect to eligibility factors, budget computations, changes in grant and terminations of grant; recommend corrective action when required.

7. Review and interpret administrative letters, memos and manual revisions with staff; investigate and respond to reports of program misuse.

8. Explain eligibility programs, qualification standards, policy-policies and procedures to clients; assist clients in completion of applications, forms and reports when necessary; review and evaluate applications for completeness and accuracy; when necessary prepare client budget to determine eligibility.

9. Apply legal criteria to determine eligibility; provide recommendations regarding financial eligibility for assistance programs; determine eligibility and grant amount according to established policies and procedures; review and determine re-certification.

10. Prepare case records related to client eligibility information and financial assistance received; update case records; submit required reports.

11. Investigate statements and information received from client through the use of telephone or written verifications.

12. Investigate and resolve client problems involving non-receipt of benefits.

13. Compose and prepare correspondence to applicants, references, and State agencies; gather statistical data and prepare reports as required.

14. Coordinate transfers of clients between counties; inform clients of procedures and necessary reports.

15. Refer clients in need of case work services to members of social service staff; may provide limited referrals to resources within the community on matters related to income maintenance; refer client to appropriate agencies according to established procedures.

16. Perform related duties as required.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: Operations, services and activities of the assigned public assistance unit; principles of supervision, training and performance evaluation; procedures, methods and techniques of determining initial and continuing eligibility; pertinent Federal, State, and local laws, codes and regulations; services provided by related agencies; interviewing and investigative skills and techniques; office procedures, methods and computer equipment; principles and procedures of record keeping and reporting; principles of human behavior; principles and
Title: Eligibility Worker Supervisor  
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practices of caseload management; departmental programs, policies, procedures and terminology; legal systems pertaining to assigned program area; supervise, organize, and review the work of technical and clerical personnel.

Ability to: Select, supervise, train and evaluate staff; interpret and apply Federal, State, local, and Departmental policies, procedures, laws and regulations; prepare clear and concise reports; audit records to determine accuracy of staff; analyze and interpret information and recommend and implement effective course of action; accurately gather, record and evaluate data necessary for the determination of eligibility for various public assistance programs; interview applicants for public assistance and obtain appropriate information; perform the full scope of the duties assigned to the unit; operate a computer terminal and standard office machines; effectively communicate with and elicit information from clients in difficult situations, often in different languages, or dialects of English; interpret and apply federal, state, and local Equal Employment, Affirmative Action, and Civil Rights laws, procedures, and regulations; communicate clearly and concisely, both orally and in writing; establish and maintain cooperative working relationships with those contacted in the course of work.

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education: None

Experience:

Three (3) years (6,000 hours) of experience in a social service agency or other public or private agency making initial and continuing eligibility determinations for customers applying to receive assistance from social welfare programs or community services, such as unemployment or veterans benefits; social security; financial assistance; eligibility for health, counseling or social services; or public housing.

License and Certification: None

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

TO: 2917 Program Support Analyst, 2915 Program Specialist Supervisor
FROM: 2905 Human Services Agency Senior Eligibility Worker

ORIGINATION DATE: 1/7/1972

AMENDED DATE: 3/15/1993; 3/xx/2015
Title: Eligibility Worker Supervisor
Job Code: 2907

REASON FOR AMENDMENT
To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

BUSINESS UNIT(S):
COMMN, SFMTA