

ELIGIBILITY CLERK

DISTINGUISHING FEATURES OF THE CLASS: Under general supervision, an incumbent of this class, located in the Department of Social Services or at Westchester Community College, performs moderately complex eligibility and clerical support functions to assist program and/or administrative staff in determining the eligibility of customers or students for various Federal and State funded programs. For the Department of Social Service, programs include Temporary Assistance to Needy Families (TANF), Emergency Assistance to Families (EAF), Emergency Assistance to Adults (EAA), Housing, Medical Assistance, Medicaid, Food stamps (SNAP), Child Support Enforcement, and numerous other temporary assistance programs and services. At Westchester Community College, the work involves determining eligibility for financial aid. An incumbent assigned to either department is expected to learn applicable program regulations, policies and procedures to relieve superiors of the more routine tasks and support functions associated with the eligibility process, including contact with customers, vendor agencies or students to provide information about programs as well as gather information relating to cases and student records in all phases of disposition. Work also includes using a variety of database management systems such as the state's Welfare Management System or the College's database system, PeopleSoft, and other departmental databases to gather case information or information for student records to support case processing and management, reporting and tracking. While supervision is not a responsibility of this class, incumbents are expected to provide guidance to lower-level clerical support staff as needed. Does related work as required.

EXAMPLES OF WORK: (Illustrative Only)

Reviews customer applications for various benefits for completeness; advises customers of missing information or if other documentation and/or forms are needed to complete the application process by referring to, and following established guidelines, policies and procedures;

Advises applicants about the programs for which they are eligible for assistance by referring to established departmental guidelines;

Determines if all applicant statements are complete and consistent with all other documentation provided;

Contacts applicants to make further inquiries, as needed, relating to matters such as household income, changes in marital status, or other elements that might affect the applicant's eligibility; follows departmental deadline-related protocols involving customer follow-up and response for additional documentation;

Refers cases to a higher level supervisor where fraud seems indicated or suspected;

Refers customers to other departmental program services based on the information provided by the applicant;

Makes collateral contacts for specific documentation or verification of documentation on behalf of program staff;

Data enters changes to open cases; routes case to an Eligibility Examiner if a redetermination of eligibility must be made;

EXAMPLES OF WORK: (Illustrative Only) (Cont'd.)

May interview applicants for the food stamp program (SNAP) by using a screening checklist tool; data enters information provided by the applicant to the Welfare Management System, and following established departmental protocols generates a budget if the applicant qualifies;

Gathers case information and all other appropriate documentation, including automated case management records, for presentation by higher level Eligibility staff at Fair Hearings and other judicial proceedings, as directed;

Receives checks, money orders or proof of payment from benefit recipients

Generates notices to recipients of agency actions relating to changes in benefits either through the system-generated Client Notice System or using standard templates;

Reactivates closed cases for which the Office of Temporary Disability and Assistance's Office of Administrative Hearings has designated as "Aid to Continue";

Researches paper and electronic records to obtain missing information to assist in completing case summaries and records of actions taken;

Receives a variety of documents and scans and indexes as needed; uses a variety of database management systems to maintain, query and retrieve agency records;

Creates, maintains and/or updates internal departmental tracking documents and logs to assist in case management, retention and/or destruction;

Keeps abreast of Temporary Assistance regulations, policies and procedures to respond to customer inquiries and provide eligibility support functions to program staff in an effective manner;

Performs eligibility and clerical support functions involving simple word processing duties such as preparing routine correspondence; forms, and spreadsheets;

Assists eligibility and program staff in managing cases by sending e-mail reminders to unit staff regarding assigned work;

Coordinates and schedules meeting for eligibility staff and managers, as necessary;

Uses computer applications or other automated systems such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments;

May perform other incidental tasks, as necessary.

FULL PERFORMANCE, SKILLS, ABILITIES, AND ATTRIBUTES: Good knowledge of modern office procedures, including filing systems and automated office equipment; ability to work effectively with other employees; ability to meet with the public; ability to analyze facts related to the determination of financial eligibility for assistance; ability to work with applicable regulations governing the program; ability to understand and follow oral and written instructions; ability to record information legibly and accurately; ability to plan and organize clerical work; ability to effectively use computer applications such as spreadsheets, word processing, calendar, e-mail and database software; ability to read, write, speak, understand, and communicate in English sufficiently to perform the essential duties of the position; tact; emotional maturity; physical condition commensurate with the demands of the position.

MINIMUM ACCEPTABLE TRAINING AND EXPERIENCE: Possession of a high school or equivalency diploma and either: (a) an Associate's Degree* and one year of experience which involved the provision of services to individuals or clients in a human services setting**; or (b) three years of experience as stated in (a).

SUBSTITUTION: Satisfactory completion of 30 credits* may be substituted on a year for year basis for each year of the above stated experience.

**DEFINITION: Human services setting shall be defined as an organization in which human services are provided, generally to prevent as well as resolve problems and to assist individuals in functioning as effectively as possible; services include but are not limited to social, economic, psychological, and/or emotional support services that are provided to clients or individuals (services are generally related to public assistance, social services, mental health, substance abuse, aging, special needs, etc.). Human services experience involves direct contact with the client or individual.

*SPECIAL NOTE: Education beyond the secondary level must be from an institution recognized or accredited by the Board of Regents of the New York State Education Department as a post-secondary, degree-granting institution.