



## Office of Human Resources Eligibility Technician Lead - CA2667

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### General Statement of Duties

Performs regularly assigned lead work duties over eligibility technicians including providing on-the-job training and technical support, monitoring work, ensuring accurate application of program rules and regulations, and identifying areas for process improvement in order to support the eligibility team and works with clients in-person and/or in a high-volume call center environment.

### Distinguishing Characteristics

This classification performs permanently assigned lead work duties over eligibility technicians. It is distinguished from the Eligibility Technician II classification that conducts interviews to determine initial and on-going financial eligibility for public assistance programs of less complexity. This classification is also distinguished from the Eligibility Specialist that performs advanced level eligibility work that involves extensive client interaction and resolving complex eligibility issues. Work is performed in-person and/or in a high-volume call center setting.

There are four classifications in the eligibility series. The Eligibility Technician I is the introductory/entry level classification which primarily focuses on learning the program and processing Food and Medical Assistance cases. The Eligibility Technician II classification performs full eligibility work, which incorporates additional programs such as Adult Financial, Long Term Care and/or Colorado Works, with increased levels of independence. The Eligibility Specialist classification performs advanced level eligibility work as a subject matter expert, which may include analysis and processing of high level data and reports, independently processing eligibility cases, to include assignments with community partners and, and/or high-level research and problem solving of difficult eligibility cases. The Lead Eligibility Technician performs permanently assigned lead work over eligibility technicians.

### Essential Duties

Performs lead work duties over Eligibility Technicians I and II.

Provides on-the-job training, mentors new and established employees, and collaborates with the training unit on course content, materials, and claims review.

Monitors work activity on caseloads to ensure that cases are clearly and thoroughly documented, reviews and analyzes case records and reports for completeness and accuracy, identifies compliance and production problems, and recommends and implements process improvements.

Assists eligibility technicians with processing and determinations of cases as needed, to include difficult and/or complex cases and acts as an arbitrator when problems occur between applicants/clients and employees. Coaches and mentors Eligibility Technicians to achieve productivity and quality goals.

Reviews and interprets legal documents provided by the client such as court documents/orders, property transactions, trusts, annuities, life insurance policies, financial transactions, and transfers of resources to determine eligibility for public assistance programs.

Acts as an eligibility determination subject matter expert for the total array of programs and services available to clients and serves as a resource to eligibility staff by assisting staff with difficult/complex cases, formulating approaches to address issues/problems, and briefing supervisors/managers on reoccurring concerns and issues.

Determines initial and on-going eligibility for public assistance programs in accordance with federal, state, and county rules and regulations, approves and issues benefits, and facilitates entry into community-based programs.

Records client information, enters and updates information into complex state and county computer systems, and responds to inquiries about case records for administrative state hearings, federal reviews, fraud investigations, and federal and state program management and evaluation.

Monitors changes in client's status, contacts clients to verify changes, and makes appropriate adjustments to eligibility and support payments.

Reviews procedures, assists in the development or revision of needed procedures, and troubleshoots system errors within the state computer system.

Maintains current knowledge of the Colorado Benefits Management System, programs, policies, and community resources and adjusts work processes to ensure accurate provision of benefits.

Provides work instruction and assists employees with difficult and/or unusual assignments.

Assigns and distributes work, reviews work for accuracy and completeness, and returns assignments with recommendations for proper completion.

Resolves problems encountered during daily operations and determines appropriate solutions.

Provides quality customer service with dignity and response to all client in need.

Develops the ability to communicate eligibility results to clients and explain how the outcome was determined.

Protects confidential and personal information for any inappropriate disclosure.

Meets productivity and quality expectations to meet the needs of the division's clients.

Documents situations which may be cause for accountability discussions and/or disciplinary action and provides this information to the supervisor.

Performs other related duties as assigned.

Employees may be re-deployed to work in other capacities in their own agencies or in other City agencies to support core functions of the City during a City-wide emergency declared by the Mayor.

Any one position may not include all of the duties listed. However, the allocation of positions will be determined by the amount of time spent in performing the essential duties listed above.

## Competencies

**Conflict Management** - Manages and resolves conflicts, confrontations, and disagreements in a positive and constructive manner to minimize negative personal impact.

**Developing Others** - Develops the ability of others to perform and contribute to the organization by providing ongoing feedback and by providing opportunities to learn through formal and informal methods.

Problem Solving- Identifies and analyzes problems; uses sound reasoning to arrive at conclusions; finds alternative solutions to complex problems; distinguishes between relevant and irrelevant information to make logical judgments.

Technical Competence - Uses knowledge that is acquired through formal training or extensive on-the-job experience to perform one's job; works with, understands, and evaluates technical information related to the job; advises others on technical issues.

Working with People - Shows respect for the views and contributions of other team members. Shows empathy, listens, supports, and cares for others, and reconciles conflict.

### **Knowledge & Skills**

Knowledge of interviewing techniques sufficient to be able to elicit information.

Knowledge of policies, procedures and regulations of eligibility programs sufficient to be able to locate relevant information and reference materials and provide technical support and assistance.

Knowledge of data privacy and protection practices.

Knowledge of basic leadership techniques and principles.

Skill in large scale data analysis, error trending and planning

Skill in independently adapting, interpreting, and applying written guidelines, precedents, and standardized work practices to a variety of unprecedented or problematic situations.

Skill in the use of computer software, including word processing, spreadsheet, document management, electronic mail and database programs.

Skill in multitasking while using multiple systems and information resources to gather and research information necessary to process a case.

Skill in time management and ability to maintain a high level of productivity and quality in a high-volume environment and competing priorities.

### **Level of Supervision Exercised**

Performs regularly assigned lead work over Case Management Coordinator I and Case Management Coordinator II positions.

### **Education Requirement**

Graduation from high school or the possession of a GED, HiSET or TASC Certificate.

### **Experience Requirement**

Three (3) years of experience determining eligibility for a variety of public assistance programs.

### **Education & Experience Equivalency**

Additional appropriate education may be substituted for the minimum experience requirements.

**Licensure & Certification**

None

**Working Environment**

Subject to many interruptions.

**Level of Physical Demand**

1-Sedentary (0-10 lbs.)

**Physical Demands**

(Physical Demands are a general guide and specific positions will vary based on working conditions, locations, and agency/department needs.):

Color vision: Ability to distinguish and identify different colors.

Depth Perception: Ability to judge distances and space relationships.

Eye/Hand/Foot Coordination: Performing work through using two or more body parts or other devices.

Field of Vision: Ability to sharply detect or perceive objects peripherally.

Fingering: Picking and pinching, through use of fingers or otherwise.

Handling: Seizing, holding, grasping, through use of hands, fingers, or other means.

Hearing: Perceiving and comprehending the nature and direction of sounds.

Lifting: Moving objects weighing no more than 10 pounds from one level to another.

Repetitive motions: Making frequent or continuous movements.

Sitting: Remaining in a stationary position.

Talking: Communicating ideas or exchanging information.

Vision Near Acuity: Ability to perceive or detect objects at 20 inches or less.

**Background Check Requirement**

Criminal Check

Employment Verification

Education Check

**Assessment Requirement**

None

**Probation Period**

Six (6) months.

**Class Detail**

**Pay Grade: NE-12**

**FLSA Code: N**

**Established Date: 9/21/2018**

**Established By: LS**

**Revised Date: 3/28/2024**

**Revised By: MF**

**Class History: 5/29/22 – Revised pay grade. Revised experience requirement; 3/28/24 – Revised General Statement of Duties, Distinguishing Characteristics, Essential Duties, Competencies and Knowledge & Skills.**