

**MONTGOMERY COUNTY GOVERNMENT  
ROCKVILLE, MARYLAND  
CLASS SPECIFICATION**

**Class Code: 002015  
Grade: 22  
FLSA: Exempt**

**GOVERNMENT ASSISTANCE ELIGIBILITY SPECIALIST III**

**DEFINITION OF SERIES:**

The Government Assistance Eligibility Specialist series covers positions responsible for determining eligibility for various programs available to assist individuals, families, children, seniors, and people with disabilities needing financial and/or medical assistance and other support services.

**DISTINGUISHING CHARACTERISTICS:**

This is human services work that provides lead level direction to staff engaged in determining eligibility of County residents for various financial and/or medical assistance programs available to assist families, children, seniors, the disabled and others who need financial assistance and other support services.

**MAJOR DUTIES:**

An employee in this class applies thorough knowledge of financial assistance eligibility rules and procedures and availability of (and general criteria for) other services for the purpose of providing guidance and instruction to the financial assistance staff regarding the accurate and timely processing of applications and the maintenance of complete and accurate case files; resolving problem cases that involve investigation of special circumstances and follow-up; transmitting instructions to staff regarding new or deleted requirements; and serving as a point of contact to agency staff and providers regarding community resources. Knowledge of a similar nature is applied by those few employees in this class who have been designated to handle customer appeals or employee training, exclusively.

**EXAMPLES OF DUTIES: (Illustrative Only)**

- Serves as Lead Worker, providing work direction to journey and entry-level specialists engaged in determining the eligibility of persons for aid under federal, state and county assistance programs and to office support staff; provides instruction on managing caseloads, meeting productivity levels, completing caseload assignments, and expediting cases; fields customer complaints regarding eligibility determinations made by subordinate staff by reviewing the facts of the case and advising the customer, accordingly.
- Conducts and documents results of monthly case file reviews to determine accuracy and completeness; identifies error trends; provides information for corrective action or training. Prepares and manages cases and performs all other work of a journey level specialist, as necessary.
- Responds to inquiries from customers, subordinate staff, public or private sector service provider staff, and/or community groups concerning financial assistance laws, regulations, requirements, policies, and procedures; provides information and clarification regarding the application of eligibility requirements, or status of an application or investigation, etc.
- Provides assistance for cooperative efforts within and outside of the agency and resolution of problems that are of mutual concern to all parties involved.
- Provides instruction and guidance to subordinate staff regarding the use of financial assistance automated systems for entering and tracking customer data; troubleshoots system errors with appropriate IT and program support staff; directs subordinate staff in use of workarounds, as necessary, to maintain workflow; compiles and analyzes error statistic for management purposes, prepares reports and recommends measures to improve error rates.

- Advises subordinate staff, providers, and others on eligibility to qualify as a community service agency, may evaluate their services, and communicates their availability to agency staffs.
- Reviews appeals and monitors/guides the appeals process for a large unit; establishes and discusses facts and determinations with case managers and appellants; determines if initial eligibility determination was accurate and provides corrective guidance to originating case managers, as necessary; prepares documentation to support agency's position; represents the agency at administrative hearings by providing oral and written defense; distributes findings to staff and advises them of corrective action, as warranted, resulting from findings of the administrative hearings.
- In a large unit, provides (on a continuing basis) instruction and guidance to an assigned group of newly hired trainees (i.e., IAPs I); assesses staff training needs, prepares and conducts classroom and on-the-job training, prepares training materials, tracks and documents results and performs related tasks; develops and presents formal training courses and programs on financial assistance program policies and requirements for financial assistance staff, community agencies, service providers and others within the department.
- Recommends changes in work processes, assignments, and other unit operations to meet work requirements. Acts for supervisor in his/her absence.
- Performs related duties as required.

**SUPERVISORY CONTROLS:**

Employees in this class, within their assigned areas of responsibility, proceed independently to plan and carry out assignments, resolve most conflicts that arise and coordinate the work with other staff, departmental units, and agencies, as necessary. Completed work is reviewed for effectiveness in achieving established goals and objectives.

**SUPERVISION EXERCISED:** Employees in this classification may lead lower-level positions.

**GUIDELINES:**

The work is subject to established guidelines in state and federal regulatory, policy, and procedural manuals; but the day-to-day operational matters handled by the employees presents challenging circumstances for which the employee is granted latitude to make adjustments and modifications in standard office procedures (e.g., revising methods, approaches, and staff assignments to accommodate changes in criteria for determining eligibility, to reverse unacceptable error rates, and/or to deal with staffing proficiency levels or unanticipated shortages).

**COMPLEXITY:**

Complexity of the work is reflected in the high volume of customers; the multiple, varied, and frequently changing financial assistance options that exist for meeting customers' needs; the expectations that must be met for production, accuracy, and staff case file reviews; and the research and investigation involved in the more unusual cases referred by subordinates.

**SCOPE AND EFFECT:**

The work of the class directly affects the economic and social wellbeing of County residents by providing financial and other assistance to those in need.

**CONTACTS:**

Contacts are with applicants and their families, their representatives, professional social service and related staffs within the department, in state and federal agencies, other counties, and community social service

agencies, and service providers for the purpose of obtaining or verifying information, coordinating actions regarding complaints of persons dissatisfied with eligibility determinations, and providing information and advice concerning the circumstances of applicants and enrolled persons to facilitate appropriate case management.

**PUBLIC SERVICE /ASSISTANCE:**

Public service/assistance is provided to applicants and persons in the programs on demand or on an on-going basis and involves sensitive and detailed interviewing of customers to determine an applicant's eligibility and the appropriate aid category to which he or she is eligible.

**HAZARDS:**

Performance of this work involves some risk resulting from exposure to persons manifesting aggressive and unpredictable behavior.

**MINIMUM QUALIFICATIONS:**

**Education:** Graduation from an accredited college or university with a Bachelor's Degree.

**Experience:** Two (2) years of experience as a journey level specialist in the program area(s) to which assigned, or two (2) years of equivalent work experience.

**Equivalency:** An equivalent combination of education and experience may be substituted.

**Knowledge, Skills, and Abilities:**

***Thorough Knowledge of:***

- The economic and social needs of individuals and families and the factors and circumstances that affect their ability to be economically independent.
- Services available through community resources, including public and private agencies, which serve persons in need.
- Applicable federal, state, and county laws and regulations relating to eligibility for multiple financial assistance and/or medical programs.
- Welfare reform, work incentives programs and child support programs.
- State and agency policies and procedures applicable to the processing of requests for fair hearings and appeals.
- Legal remedies and options available to the agency in the appeals process.
- Process to initiate the overpayment claims process.
- State and agency automated systems and databases and their impact on the eligibility process and outcome.
- Work assignment and review, personnel administration, and labor-management agreements to perform work leader functions.

***Skill In:***

- Assessing information and data regarding the economic status of persons and as required by the program area(s) of assignment, detailed financial records.
- Advising customers and their families regarding aid programs and their requirements.
- Explaining and defending ideas and positions, both orally and in writing, to individuals and groups to support assigned program activities or decisions.
- Using computers and numbers.

- Interpersonal skills to deal tactfully, effectively, and equitably with people of all backgrounds, at times in emotionally charged situations.

***Ability to:***

- Train and coach others.
- Use and manipulate numbers.
- Attend meetings or perform other assignments at locations outside the office.

**Licenses, Registrations, Certifications, or Special Requirements:** None

**Work Environment:**

The work is normally performed in an office environment or institutional setting.

**Physical Demands:**

Work is sedentary in nature, with some standing, walking and traveling between work sites.

**PROBATIONARY PERIOD:**

Individuals appointed to a position in this class will be required to serve a probationary period of six (6) months, during which time performance will be carefully evaluated. Continuation in this class will be contingent upon successful completion of the probationary period.

**BARGAINING STATUS:** Positions assigned to this class are normally in the Office, Professional, and Technical (OPT) bargaining unit.

**MEDICAL PROTOCOL:** Limited Core Exam with a Drug/Alcohol Screen.

**PROMOTION POTENTIAL:** Employee who meets the minimum qualifications may be competitively promoted to the Government Assistance Eligibility Supervisor.

**CLASS SPECIFICATION HISTORY:**

**Class Established:** August, 1998

**Revised** January, 2002 (M)

April, 2003

April, 2007 (M)

August, 2013

**Classification Study:** September, 2021(M)\*

**\*Former Title/Grade:** “Income Assistance Program Specialist III/22.”