

# MOWER COUNTY CLASS SPECIFICATION

## CLASS TITLE: Financial Worker

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| <b>BAND:</b>   | <b>GRADE:</b><br>7   | <b>SUBGRADE:</b>                  |
| <b>DEPARTMENT:</b><br>Human Services   | <b>ACCOUNTABLE TO:</b><br>Financial Assistance<br>Supervisor | <b>FLSA STATUS:</b><br>Non-exempt |
| <b>CLASS SUMMARY:</b><br>Financial Workers determine initial and ongoing client eligibility for various financial assistance programs in accordance with eligibility regulations, guidelines and procedures governing the programs. Performs caseload management activities and documentation requirements on all case files and records.  |  |                                   |
| <b>DISTINGUISHING CHARACTERISTICS:</b><br>This classification represents the first level in a three level classification series of Financial Workers. This classification represents the entry-level classification within the series where financial workers perform the requirements of the job and learn all eligibility and program guidelines and requirements necessary to perform the work. This classification differs from Financial Assistance Specialist in that this classification represents the journey level worker who performs the full range of responsibilities associated with the class but also serves as a lead worker who provides assistance and training to less experienced staff and also participates in reviewing changes in program requirements and in changes in program operations. |  |                                   |

| <b>DUTY NO.</b> | <b>ESSENTIAL DUTIES:</b> (These duties are a representative sample; position assignments may vary.)  | <b>FRE-QUENCY</b> |
|-----------------|--|-------------------|
| 1.              | Determines initial eligibility for various financial assistance programs (e.g. food stamps, medical assistance, etc.). Interviews clients and reviews data contained on application form. Enters all required client and financial information on MAXIS and MMIS systems. Reviews client information; reviews, verifies or obtains required certifications if needed, and determines level of assistance or eligibility. | Daily<br>40%      |
| 2.              | Assists in screening prospective clients. Conducts initial interview to determine the need for a follow up intake appointment with financial workers, to determine if emergency assistance or expedited assistance is desired, and provides explains and answers to questions concerning the process and programs offered through financial assistance.  | Weekly<br>5%      |

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| DUTY NO. | ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)  | FRE-QUENCY   |
|----------|---|--------------|
| 3.       | Conducts client ongoing or re-determination eligibility reviews for all agency programs. Reviews re-certification income reviews, household change report forms, enter relevant changes into the MAXIS and MMIS systems, act on any relevant changes. | Daily<br>15% |
| 4.       | Performs all case management functions and duties necessary to maintain, document and manage client files, records and reports in accordance with state, federal or departmental policies, routines or requirements.                                  | Daily<br>30% |
| 5.       | Reviews, reads and keeps informed of all information bulletins and changes regarding financial assistance programs. Attend DHS and agency training programs.  | Varies<br>5% |
| 6.       | Conducts interviews with clients and/or their representatives regarding the appeal requests; explains appeal procedures; and takes appropriate action(s) on appeal requests. Represents the County in State appeal hearings.                          | Daily<br>5%  |
| 7.       | Performs other duties of a comparable level or type.  | As Required  |

**Knowledge** (position requirements at entry):

Knowledge of:

- Interview techniques and procedures
- Human service programs, operations, and policies of the agency
- Eligibility requirements and guidelines for all relevant programs
- General computer operation and use of data processing applications
- General fundamentals of social services and human behavior
- Basic mathematics

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**Skills** (position requirements at entry):

## Skill in:

- Use and operation of the MAXIS and MMIS program(s);
- Interviewing and obtaining information from clients;
- Explaining detailed information;
- Making calculations to determine eligibility;
- Interpreting, reading and understanding regulations, policies and procedural information;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction

**Training and Experience** (position requirements at entry):

High School Diploma or (G.E.D.) and up to one year of specialized or technical training beyond high school in the area of human services, social services, psychology or related area; or an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

**Licensing Requirements** (position requirements at entry):

- None

**Physical Requirements:**

Positions in this class typically require: reaching, walking, fingering, grasping, talking, hearing, seeing and repetitive motions.

Incumbents are subjected to disagreeable public contact involving conflict.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body.

**Classification History:**

Draft prepared by Fox Lawson and Associates LLC

Date: 12/1998

Revised by BCC 12/99