



## Capital Area Council of Governments Job Description

**CAPCOG Title:** Benefits Counselor

**Division:** Aging Services

**Reports to:** Program Manager for Benefits, Nutrition, Data Mngt

**State Title and Salary Grade:** Human Services Specialist V/B15

**FLSA Status:**  Exempt  Non-Exempt

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### GENERAL DESCRIPTION

Performs moderately complex human services and mediation work. Work involves collecting, preparing, reviewing and analyzing case data used to determine client eligibility for financial, medical and/or social services. Work requires application of specialized program knowledge and service skills used to develop a plan of action. Makes decisions concerning the scope and nature of remedial action on a continuing basis. Work involves advising and assisting clients in filing claims for benefits and investigating complaints. May supervise the work of volunteers. Works under moderate supervision with limited latitude for the use of initiative and independent judgment.

### ESSENTIAL FUNCTIONS

Essential duties and functions may include the following. Other related duties may be assigned.

#### Interviews:

- clients or their authorized representative to gather information used in determining client eligibility for financial, medical and/or social services via telephone or in person, this may involve a home visit, if requested.

#### Provides:

- explanation of program benefits and requirements to clients
- description of other community services available to clients and makes referrals to other internal or external agencies for assistance as appropriate
- information to clients on rules, regulations and procedures
- information to clients; investigates complaints; and communicates with insurance carriers and health care providers on behalf of clients
- assistance to clients in preparing for hearings before a referee or examiner, and responding to requests for court action
- documentation in case records in the manner prescribed by the agency and prepares and submits appropriate reports
- training and assistance to workers/volunteers and advises manager on ways to enhance training program
- education programs or presentations to departments, agencies, civic groups and the general public

#### May:

- provide input in the development of program policies and procedures
- interpret program policies and procedures
- exercise initiative, creativity and judgment in applying and adapting knowledge of human service delivery theories and practices to bring about solution

## GENERAL QUALIFICATIONS

**Education:** Bachelor's degree from an accredited four-year college or university with a major course work in social services, or a related field is preferred.

**Experience:**

- Experience working within the human services field, insurance field, or public benefits assistance preferred.
- Bilingual preferred, not required

**Certification:**

- Must obtain Benefits Counselor I certification within three months of hire date.

### Knowledge, Skills, and Abilities

Knowledge of:

- Computer operations systems and procedures
- Microsoft Word, Excel, SharePoint and Outlook
- Older Americans Act and Texas Administrative Code

Skill in:

- Written and oral communication
- Preparing reports
- Personal computers
- Use of applicable software

Ability to:

- Document clearly understood case notes in applicable software in a timely and accurate manner
- Interpret program information for the public
- Enter service unit data in applicable software
- Perform duties in compliance with rules and regulations

### Position Specific Competencies

- Attention to Detail: Ability to focus meticulously on all duties, assignments, schedules, and resources.
- Judgment: Demonstrates critical thinking based upon in-depth data gathering, corroborating information, considering others' input, and ethics.
- Regulatory Compliance: Understand regulations and ensures that work is in compliance with regulations.
- Work Organization: Balances competing priorities to meet project and team commitments in a timely manner and deliver quality results.

### Other Requirements

Must maintain a valid Texas driver's license, proof of insurance specified by the State of Texas, and dependable transportation for travel within region.

## Physical Requirements

<b>Remain in a stationary position</b> at a desk throughout the workday.	Frequently
<b>Stand and perform tasks</b> throughout the workday. May be stationary for periods of the day.	Seldom
<b>Move about</b> inside the office to perform different tasks of the position such as access the copy machine, file papers, or deliver mail to the reception area.	Seldom
<b>Coordinate precise movements of the fingers</b> in order to use office productivity machinery or perform intricate tasks.	Frequently
<b>Move objects</b> weighing up to designated # of pounds.	Seldom - 15 lbs
<b>Lift objects</b> from the floor and up onto a shelf or desk weighing up to designated # of pounds.	Seldom - 15 lbs
<b>Converse with others</b> both in person and over the phone.	Regularly
<b>View details at close range</b> (within one to two feet of the observer) and distinguish color-coded materials.	Seldom
<b>Move body into multiple positions</b> to perform different tasks such as in the following examples: under desks, between walls, around servers and furniture, or to retrieve files from the bottom or top drawers of file cabinets.	Seldom
<b>Performs duties in professional office environment</b>	Constantly
<b>Performs duties while exposed to conditions</b> of heat, cold, humidity, wind and/or rain.	Seldom
<b>Drives</b> a vehicle to perform CAPCOG business.	Seldom

**KEY**

Never 0%     Seldom 0-30%     Regularly 30-60%     Frequently 60-90%     Constantly 90-100%

*Seldom would be up to 12 hours per week or 0 to 2.4 hours per day*

*Regularly would be 12 to 24 hours per week or 2.4 to 4.8 hours per day*

*Frequently would be 24 to 36 hours per week or 4.8 to 7.2 hours per day*

*Constantly would be 36 hours to 40 hours per week or 7.2 to 8 hours per day*

*I have read and understand all aspects of this job description. I have discussed the duties with my supervisor.*

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Employee Printed Name, Signature and Date

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Supervisor Printed Name, Signature and Date