

New

Ministry

Assisted Living and Social Services

Describe: Basic Job Details

Position

Position ID

Position Name (200 character maximum)

Program Eligibility Assessor

Requested Class

Program Services 1

Job Focus

Operations/Program

Supervisory Level

Agency (ministry) code

Cost Centre

Program Code: (enter if required)

Employee

Employee Name (or Vacant)

Organizational Structure

Division, Branch/Unit

Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Supervisor's Current Class

Design: Identify Job Duties and Value

Job Purpose and Organizational Context

Why the job exists:

Reporting to the AISH Application Team Lead, the Program Eligibility Assessor is responsible for determining initial financial eligibility for the Albertans applying to the Assured Income for the Severely Handicapped (AISH) program. It is estimated that over 15,000 Albertans will require a financial eligibility assessment each year. The Program Eligibility Assessor conducts a detailed, in-depth review of the applicant's income and assets to determine if financial eligibility for the AISH program is met. Eligibility decisions must follow acceptable practices and guidelines as defined by program and operational policy, procedures and align with legislations.

In addition to determining financial eligibility, this position is responsible for determining when benefits for the AISH program should commence. If financial eligibility is not met, the Program Eligibility Assessor informs the applicant of the decision and provides information or refers that applicant to other programs and supports offered within the GOA or community. If the financial eligibility decision is appealed, this position will represent the director at appeals hearings.

Responsibilities

Job outcomes (4-6 core results), and for each outcome, 4-6 corresponding activities:

Determine initial financial eligibility for the Assured Income for the Severely Handicapped program

- Reviews income of applicant, and their cohabiting partners to ensure amounts do not exceed limits allowed under the program. This requires the Program Eligibility Assessor to review each income reported and apply the appropriate exemption, if applicable. Income may be considered non-exempt, partially exempt or fully exempt. There are over 85 different types of income each with different exemption criteria that may exist including pension income, self-employment income, passive business income, employment or other benefit payments.
- Ensures the applicant has accessed all financial resources available such as Canada Revenue Agency (filing income taxes), applied to the Canadian Disability Benefit and the Canada Pension Plan Disability. If resources have not been accessed, the Program Eligibility Assessor will take this into account when determining monthly benefit amounts and supports the applicant to apply to these programs.
- Reviews assets of applicant, clients and their cohabiting partners to determine the value and ensure amounts do not exceed limits allowed under the program. Assets are valuable items such as cash, securities and investments, stocks, shares, bonds, inventory, equipment, real estate, vehicles, and other property. Assets may be exempt or non exempt.
- Ensures supporting documentation for each income and asset is on file. Follow up with the applicant is frequently required to obtain additional information or further substantiation.
- Uses in-depth knowledge of financial products and corresponding documents to identify when an applicant may not have declared all financial assets.
- Where appropriate, determine if relationship of interdependence exists as per the *Adult Interdependent Relationship Act*.
- For Permanent Residents, consult with Citizenship and Immigration Canada to determine if sponsorship in place. If sponsorship in place, the Program Eligibility Assessor determines the sponsorship value, and reports any sponsorship breakdown to Immigration, Refugees and Citizenship Canada (IRCC).
- Assesses and manages situations where an applicant's financial resources exceed the income eligibility requirement but are insufficient to meet their basic needs due to high medical costs associated with their disability. This includes preparing and applying to the Minister or designate for financial hardship exemption.
- Communicates financial eligibility decisions to applicants and notifies applicants of their right to appeal or submit additional information for review when financial eligibility is not met.
- Calculates the start date of benefits based on program policy and procedures.
- Based on monthly income, the Program Eligibility Assessor determines the frequency of ongoing income eligibility reviews and will flag the file for any assets where a 12-month asset exemption applies.
- Approves appointment of a Financial Administrator to assist applicants who are incapable of managing their disability benefits, after reviewing the Financial Administrator's suitability.
- Communicates responsibilities and record keeping requirements to the Financial Administrator.

Provision of Information to Albertans and Stakeholders

- Responds to telephone and email inquiries from applicants, social workers or other stakeholders. Calls may be related to the application status, an eligibility decision, follow-up requests or questions regarding how income and assets were applied.
- Provides decision rationale in a sensitive manner, with plain language to applicants with a wide variety of medical conditions and/or impairments. Must tailor the communication approach to individual's capacity.
- Explains how each income and asset is used to determine eligibility and monthly benefit amount.

- Provides courteous, timely and accurate information to callers regarding the AISH program and other disability program's application processes.
- Provides appropriate referrals when required to employment supports, other municipal, provincial or federal government departments, agencies, or resources.
- Informs ineligible applicants of alternative resources to meet their needs and assists applicants to access the services required. (e.g. mental health services, student funding sources, etc.).
- Ensures all communication with applicants, social workers or stakeholders is documented accordingly in the appropriate systems (i.e. TOI, CXOne, Service Now).

Represent the Director at Financial Eligibility Appeals

- Acts as the Department Representative at financial eligibility appeals to represent decisions on financial eligibility and provide rationale.
- Completes the hearing preparation worksheets and prepare to discuss decision and action taken with a file.
- Documents the final appeal decisions and related sites when panel decision is provided.

Problem Solving

Typical problems solved:

- The Program Eligibility Assessor has the delegated authority to determine financial eligibility for the AISH program. They need to review and assess the documentation received and ensure the reported income and assets meets the allowable amounts as defined in the AISH Act and Regulations. Discrepancies in income and asset reported by the applicant may be identified and requires further investigation by the Program Eligibility Assessor to ensure program integrity is maintained.
- The Program Eligibility Assessor determines if income and assets are non-exempt, partially exempt or fully exempt. This may involve but not limited to:
 - determining the true value of large assets such as vehicles, ATVs, property and homes
 - reviewing structured settlements and trusts-legal documents
 - reviewing Workers' Compensation Board documents, documentation from long term disability programs, and pension documents each with different exemption levels.
- Ensuring appropriate financial documents are collected and communicating with applicants to ensure the timely submission of financial documentation. Not requesting accurate financial documents may impact commencement dates and possible retroactive payments.
- Interpret a wide range of financial documentation from personal banking information to business documents and farming income.
- Review immigration sponsorship details and determine if a sponsorship breakdown has occurred.
- The Program Eligibility Assessor utilizes de-escalation techniques and exercises judgement to support applicants with unique, changing and emergent needs.
- Determines communication approach to explaining financial eligibility decision and able to change the approach mid-stream to address individual client needs.

Types of guidance available for problem solving:

The Program Eligibility Assessor works independently and must be able to problem solve on their own. Duties are performed in accordance with the AISH Act, Regulations, policies, procedures and guidelines. Should the Program Eligibility Assessor not be able to resolve the problem on their own after reviewing program procedure documents,

program and operational policy, or training materials, guidance may be available from:

- Other Program Eligibility Assessors - Frequency occasionally.
 - For unusual situations, the Program Eligibility Assessor may consult with peers to determine if someone has come across a similar situation in the past and how they handled the situation.
- AISH Application Team Lead - Frequency occasionally
 - When determining financial eligibility, the Program Eligibility Assessor may consult with the Team Lead for guidance when operational policy or legislation is absent or unclear.

Direct or indirect impacts of decisions:

It is crucial that the Program Eligibility Assessor apply legislation and policy correctly, and decisions are made in a timely manner. Decisions made have profound impacts on the lives of applicants and their household. Failure to do this could result in application delays for Albertans, incorrect eligibility decisions made, applicant's and their households not being able to access financial and health benefits to which they are entitled to, possible underpayments or overpayments, and a significant risk to the ministry's reputation.

Key Relationships

Major stakeholders and purpose of interactions:

Primary contacts are AISH applicants and their families, including court-appointed Guardians/Trustees or Financial Administrators appointed under the AISH Act. Purpose of these contacts is to provide AISH program information, assess financial eligibility, process AISH applications, complete Intake Assessment Reports, assess client needs and discuss other options for meeting identified needs.

Additional contacts may include other Ministry staff, client advocates, physicians, psychologists, lawyers, financial planners and other parties working with the applicant, representatives of other government programs and community resources. Purpose of these contacts is to provide AISH program information and/or achieve a more thorough understanding of applicant needs and to determine resources available to meet those needs.

The Program Eligibility Assessor also has case-specific contact with staff of the Ombudsman's office, Human Rights Commission or the Citizens' Appeal Panel.

In addition, the Program Eligibility Assessor connects regularly with other program staff on complex files.

Required Education, Experience and Technical Competencies

Education Level	Focus/Major	2nd Major/Minor if applicable	Designation
Diploma (2 year)			

If other, specify:

Job-specific experience, technical competencies, certification and/or training:

The Program Eligibility Assessor requires through knowledge of:

- The *Assured Income for the Severely Handicapped Act*, the Assured Income for the Severely Handicapped Regulation, AISH Act, and the Applications and Appeals (Ministerial) Regulation.
- Policies and procedures used in the AISH program.
- Government of Alberta programs such as Alberta Supports, Alberta Aids to Daily Living, Alberta Adult Health Benefit, Office of the Public Guardian/Trustee and Persons with Developmental Disabilities, Transition to Adulthood program or other applicable government resources.
- Programs offered by other government ministries, local and federal government including Canada Pension

Plan, Old Age Security, Canada Disability Benefits, Guaranteed Income Supplement, Maintenance Enforcement Program, Alberta Seniors Benefits, Senior's Accommodation Benefits.

- Computer programs including but not limited to Imaging, LISA, CCD, TOI, AIMS, Word, Outlook, and SharePoint.
- Ministry business plan goals, strategic priorities, issues, programs, resources, and legislative frameworks.
- Freedom of Information and Protection of Privacy Act and of Occupational Health and Safety requirements.
- Various investment types including RRSPs, RDSPs, annuities, LIRA and other investment types.

Skills:

- Well-developed and demonstrated judgement, analytical, problem solving, and decision-making skills.
- Ability to interpret legislation and appropriately communicate legislative and legal requirements and processes.
- Ability to engage effectively with diverse members of the population, who have diverse needs and may have complex needs and challenges
- Ability to interpret complex financial documents to apply AISH financial eligibility criteria (bank statements, investment statements, inheritance documents, farm and business income, life insurance, property tax assessments, and vehicle registrations for estimated asset value).
- Working knowledge of various types of income and investment portfolios including mutual funds, RRSPs, RDSPs, annuities, LIRA and other investment avenues.
- Ability to adapt and be flexible to meet the demands of a high-paced environment.
- Excellent interpersonal communication skills (verbal and written) to interact and deal effectively with internal staff, external stakeholders, applicants, clients, and their representatives.
- Strong report writing skills and ability to prepare clear and concise summaries for pre-commencement activities.
- Attention to detail and accuracy.
- Excellent decision-making skills, writing skills and organizational skills.
- Conflict resolution skills and ability to work effectively with persons who may become aggressive, angry, frustrated or depressed due to their circumstances. Ability to de-escalate situations where Albertans have become aggressive, verbally abusive, or threatening due to their circumstances.
- Ability to work effectively within a fast-paced and stressful team environment and contribute to the achievement of Department goals.
- Ability to actively participate in team meetings, project committees and workgroups.
- Ability to deal effectively with complex and sensitive situations,
- Demonstrate high levels of independence and self-management skills with a strong results orientation.

Behavioral Competencies

Pick 4-5 representative behavioral competencies and their level.

Competency	Level					Level Definition	Examples of how this level best represents the job
	A	B	C	D	E		
Creative Problem Solving	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Engages the community and resources at hand to	

		<p>address issues:</p> <ul style="list-style-type: none"> • Engages perspective to seek root causes • Finds ways to improve complex systems • Employs resources from other areas to solve problems • Engages others and encourages debate and idea generation to solve problems while addressing risks 	
Systems Thinking	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Takes a long-term view towards organization's objectives and how to achieve them:</p> <ul style="list-style-type: none"> • Takes holistic long-term view of challenges and opportunities • Anticipates outcomes and potential impacts, seeks stakeholder perspectives • Works towards actions and plans aligned with APS values • Works with others to identify areas for collaboration 	
Agility	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>	<p>Proactively incorporates change into processes:</p> <ul style="list-style-type: none"> • Creates opportunities for improvement • Is aware of and adapts to changing priorities • Remains objective under pressure and supports others to manage their emotions • Proactively explains impact of change on roles, and integrates change in existing work • Readily adapts plans and practices 	- Ability to manage and adapt to changes.
Drive for Results	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>	<p>Works to remove barriers to outcomes, sticking to principles:</p> <ul style="list-style-type: none"> • Forecasts and proactively addresses project challenges • Removes barriers to collaboration and achievement of outcomes 	

		<ul style="list-style-type: none"> • Upholds principles and confronts problems directly • Considers complex factors and aligns solutions with broader organization mission 	
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Benchmarks

List 1-2 potential comparable Government of Alberta: [Benchmark](#)

Assign

The signatures below indicate that all parties have read and agree that the job description accurately reflects the work assigned and required in the organization.

Employee Name

Date yyyy-mm-dd

Employee Signature

Supervisor / Manager Name

Date yyyy-mm-dd

Supervisor / Manager Signature