

Public (when completed)

Common Government

Update

Ministry

Seniors, Community and Social Services

Describe: Basic Job Details

Position

Position ID

50019698

Position Name (30 characters)

Sr Fin Assistance Coordinator

Current Class

Administrative Support 6

Job Focus

Operations/Program

Supervisory Level

00 - No Supervision

Agency (ministry) code

292GA

Cost Centre

602576

Program Code: (enter if required)

Employee

Employee Name (or Vacant)

Vacant

Organizational Structure

Division, Branch/Unit

Seniors & Strat Services/Seniors Program Delivery

☐ Current organizational chart attached?

Supervisor's Position ID

50016331

Supervisor's Position Name (30 characters)

ASB Team Lead

Supervisor's Current Class

Program Services 2

Design: Identify Job Duties and Value

Job Purpose and Organizational Context

Why the job exists:

The Seniors Financial Assistance (SFA) Coordinator plays a pivotal role in supporting the department's mandate to ensure the independence and well-being of Alberta seniors. The SFA Coordinator determines eligibility for the income-based Alberta Seniors Benefit program (ASB) and Alberta Health's Dental and Optical Assistance program (DOAS) based on current and previous legislation, regulations, policies and procedures. The SFA Coordinator is also responsible for the day to day management of files including annual income verification, and investigation and resolution of specific senior issues, which are received directly from seniors, their representatives, or escalated from the Alberta Supports Contact Centre. Through interactions with seniors and program systems the SFA Coordinator identifies opportunities for program or system improvement and enhancements.

This position provides a holistic approach to senior-centered services by assisting seniors to achieve better outcomes through review of a broad range of senior's needs, identifying gaps and recommending social, community and financial assistance programs to meet their needs. Guided by relevant policies and procedures, the SFA Coordinator is responsible for making decisions on the acceptability and adequacy of information provided on SFA applications and supporting documentation, identifying deficiencies and initiating action to resolve outstanding issues through direct contact with the senior.

Responsibilities

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

1. Assessment of Eligibility - Seniors' eligibility is determined for SFA programs and services within the context of current and previous legislation and policies.

Activities:

- Review documentation and confirm validity and acceptability of documents based on specific criteria.
- Identify deficiencies and determine the appropriate action to address any gaps in information.
- Analyze income information to ensure program benefits are optimized for each senior and the most beneficial option is accessed.
- For new approvals, determine the most beneficial income source for current and retroactive benefits for multiple financial assistance programs within the ministry and Alberta Health by applying previous and current regulatory policies with operational procedures and multiple eligibility factors.
- Identify deficiencies in income and make recommendations to seniors, their representatives, or their family in order to improve senior's overall financial stability through referral to other government organizations such as Guaranteed Income Supplement (GIS), Special Needs Assistance (SNA) etc.
- In accordance with Freedom of Information and Protection of Privacy Act (FOIPP) regulations, liaise with seniors, their representatives, outreach centres, homeless shelters and other government departments to coordinate with, request and/or resolve outstanding issues.
- Provide appropriate referrals to municipal, provincial, and federal departments and other agencies or support groups e.g. Seniors Housing and Immigration etc. to ensure seniors request appropriate information or apply for available programs to improve their overall well-being.
- Follow-up on files through various sources such as phone, correspondence and email to ensure requested documentation is received and make every effort to complete and maintain file eligibility in a timely manner.
- Assist and monitor seniors as needed as they apply for the Seniors Financial Assistance (SFA) programs, including automatic enrollment of Assured Income for the Severely Handicapped (AISH) clients as they transition from AISH to seniors programs.

2. Income Renewal - Annual recalculation of benefit eligibility for seniors beginning July 1st of each year to maximize benefits related to changes in eligibility.

Activities:

- Analyze and determine benefits during benefit year renewal period to determine most beneficial income option, and identify retroactive benefits if available to maximize benefits for seniors for first time eligibility and the recently approved seniors.
- Assess detailed income information from Canada Revenue Agency (CRA) and request explanations for extraordinary income increases to identify possible overpayments, or changes in eligibility factors (decrease or increase in benefits).
- Utilize specialized knowledge of CRA and internal policies to identify and escalate unique income situations for review. Provide guidance to these seniors in the appeal process and request required documentation. Once received, responsible for submitting the appeal and following up with seniors.
- Correspond with seniors to confirm income reported is correct, determine income inconsistencies or gaps and prepare correspondence to request correct income.

3. Maintain Corporate Database - Maintains corporate database that facilitates effective delivery of the ASB, DOAS, SNA, Seniors Property Tax Deferral (SPTD) and the Seniors Home Adaptation and Repair (SHAR) programs.

Activities:

- Maintain accurate and valid personal information in the database, which is the largest repository of senior's information in the provincial government. This database serves as a corporate database for ASB, SNA, DOAS, SPTD and SHAR programs so accurate and up to date information is essential.
- Conduct identity verification of all documents through personal identifiers, senior or authorized senior representatives in compliance with FOIPP guidelines, and research any documents that do not have two personal identifiers.
- Accurately interpret eligibility related information and documentation from a senior, personal representatives, Power of Attorneys, outreach centres and other government organizations and compare them to current policies and criteria for acceptability.
- Review and investigate returned correspondence in order to locate seniors by using multiple search engines (e.g. 411, internet, Alberta Health Care Insurance database) and any other search techniques that will help locate the senior.
- Review and action numerous reports both monthly and yearly to ensure seniors receive correct program benefits.
- Analyzes senior's income information upon request and recommends appropriate action to supervisor for approval (e.g.

unique income situations, unexpected financial hardship).

4. System Testing - Responsible for manual calculations and analysis of the database to ensure changes in regulatory policy and operational guidelines are reflected in the system.

Activities:

- Execute and modify a variety of test case scenarios for system testing that draw on the program elements that have changed.
- Complete complex manual calculations for multiple benefit programs to verify that system calculations reflect existing or new regulatory changes and system accuracy using in-depth knowledge of benefit parameters and payment rules associated with eligibility levels (e.g. DOAS eligibility levels, ASB cash benefits, Supplementary Accommodation Benefit (SAB) and various options in auxiliary care (e.g. Type 1, Type 2, Split Link and Long Term Care (LTC) option).
- Identify and report deficiencies or errors outlining possible reason for issues.
- Validation system testing once corrections or updates to the database have been performed.
Testing includes a sample of senior letters to ensure overall content is accurate and reflects eligibility. e.g. T5007 T- Slip, CPP Death Benefit letter and annual benefit letters.

5. Payment Management - Works closely with Payment Management Unit to research, and process returned payments and other payment requests.

Activities:

- Recognize and review overpayments and underpayments to seniors and send the necessary referrals to Payment Management Unit to initiate either a stop payment, recall, or hold until further research can be completed. This may include a referral to SNA if the program is in the process of generating a payment.
- Coordinate with Payment Management Unit to review and research returned cheques, direct deposit payments, lost or stolen payments and dormant payments to ensure seniors in need and dependent on the monthly cash benefit and/or rebate receive their financial assistance in a timely manner.
- Investigate payments reported as lost or not deposited or cashed by completing proper requisition forms to be sent to the banking institution in order to respond to senior's inquiries.
- Initiates Emergency Cheque Process when necessary to ensure seniors most in need receive payments within 48 hours.
- Identify overpayments and follow up with seniors and or their representatives to establish a repayment plan.

6. Program Development and Enhancement - Contributes to the ongoing evolution and improvement of seniors benefits programs.

Activities:

- Train new employees and complete audits of their work as they learn their role.
- Identify opportunities for process and system improvements and enhancements based on senior or file interactions.
- Participate in special projects (e.g. formation of on-line estimator, senior's centric view database, Designated Supporting Living/Long Term Care Information Portal (DLIP) database, new AIS database that enhance seniors benefit programs.
- Provide support to other areas within the division as needed including SNA to maintain divisional service levels.
- Meet with branch senior management for discussion on policy changes and provide input on operational implications and best solutions.

Problem Solving

Typical problems solved:

The SFA Coordinator determines how to best investigate and assess a variety of situations. Each year manual income renewal and validation is required for approximately 800 files each. The SFA Coordinator also investigates and determines how to resolve issues that are received directly from seniors or escalated via the Alberta Supports Contact Centre. Annual changes that impact the determination of income (e.g. changes by Canada Revenue Agency, federal benefits, deaths, changes in marital status, and SFA program policy changes) also require the Coordinator to execute test cases and complete manual calculations to ensure the system updates and calculations are accurate and performing as intended. The SFA Coordinator must think broadly about the intent of SFA programs and how the rules can be applied to maximize benefits that each eligible senior may be eligible to receive. Interpretation of policy is required in areas that have some ambiguity.

The SFA Coordinator prioritizes his/her workload to maintain a balance between processing new applications and maintaining existing files accurately, and special projects, to meet department timelines with minimal audit. Accuracy

in completing updates is essential since changes can result in a change in eligibility. The information maintained in the corporate database and calculations related to income that are completed by the SFA Coordinator support all SFA programs in the department. Eligibility for these programs is dependent on information in the corporate database; errors in the maintenance of senior data and income information, or missing information, can impact benefits received from all of the programs.

Types of guidance available for problem solving:

To identify optimum benefit options for seniors the SFA Coordinator uses legislated and regulated policies, operational policy, and procedures. The SFA Coordinator must be able to identify inconsistencies in income and request clarification. Analysis includes comprehensive understanding of the rules and regulations governing Federal Income Supports and other income sources such as Old Age Security (OAS), Guaranteed Income Supplement (GIS), Pension Splitting, Canada Pension Plan (CPP) Canada Pension Plan Disability (CPP Disability), Workers' Compensation (WCB) and Registered Retirement Savings Plan (RRSP). The Coordinator also applies in-depth understanding of documents such as Power of Attorney, Enduring Power of Attorney, Guardianship and Trustee paperwork, as well as Certificate of Incapability and Undertaking to Administer Benefits and the powers these documents provide and their acceptability for the program.

The SFA Coordinator independently exercises judgment when assessing information for acceptability of documents, approving and rejecting files, determining gaps in senior's income or needs and referring these seniors to available programs to fill those gaps. Decision making skills are applied to determine how to resolve specific escalated senior queries within the framework of the program policies, procedures and criteria.

Direct or indirect impacts of decisions:

This position impacts the operations of multiple SFA programs supporting more than 220,000 low-income seniors across Alberta: Alberta Seniors Benefit, Alberta Health's Dental and Optical Assistance, Special Needs Assistance for Seniors, Supplementary Accommodation Benefit, Seniors Home Adaptation and Repair Program, and Seniors Property Tax Deferral Program.

Key Relationships

Major stakeholders and purpose of interactions:

The SFA Coordinator interacts with a variety of different stakeholders (e.g. seniors, caregivers, Senior Information Services Offices, MLA offices, outreach centres, Office of the Public Guardian, Office of the Public Trustee, individuals with physical, emotional and mental disabilities such as transitioning AISH clients, seniors being placed in designated supportive living and longterm care, as well as seniors with language and cultural barriers. The SFA Coordinator also refers seniors to community agencies that might be helpful in addressing senior needs. Interactions require the SFA Coordinator to use tact and respect with dealing with sometimes emotionally charged seniors. The SFA Coordinator must be able to clearly explain and interpret program policies, changes in legislation, eligibility criteria, and benefit calculations in accordance with FOIPP regulations).

Required Education, Experience and Technical Competencies

Education Level	Focus/Major	2nd Major/Minor if applicable	Designation
High School Diploma	Business		

If other, specify:

Post-secondary is preferred

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

The Seniors Financial Assistance Coordinator must have thorough knowledge of various systems including:

- Alberta Seniors Benefit
- Special Needs Assistance for Seniors
- Dental and Optical Assistance for Seniors
- Seniors Property Tax Deferral Program
- Seniors Home Adaptation and Repair Program
- Alberta Health Registration system
- Accommodation Information System (AIS)
- Client Information Services (CIS)

- Business Intelligence Portal (BI)

Thorough knowledge of Seniors Benefit Act and Regulations, policies, procedures and established precedents as well as historical changes and progression.

Knowledge of the relationship and impact of the following programs and legislation on the ASB program to support the determination of eligibility for benefits:

- Dental and Optical Assistance for Seniors
- Special Needs Assistance for Seniors
- Alberta Health Care Insurance Act and Regulations
- Seniors Housing
- Freedom of Information and Protection of Privacy Act (FOIPP)
- Adult Interdependent Relationships Act
- Federal Old Age Security program
- Federal Guaranteed Income Supplement program
- Canada Pension Plan
- Canadian Income Tax Act
- Office of the Public Guardian (Adult Guardianship and Trustee Act)
- Office of the Public Trustee (Adult Guardianship and Trustee Act)
- Power of Attorney Act
- Blue Cross
- Assured Income for Severely Handicapped Act and Regulations
- Aids to Daily Living and Extended Health Benefits Regulations
- Canadian Addressing Standards Guide

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		
Build Collaborative Environments	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Facilitates open communication and leverages team skill: <ul style="list-style-type: none"> • Leverages skills and knowledge of others • Genuinely values and learns from others • Facilitates open and respectful conflict resolution • Recognizes and appreciates others 	Position needs strong interpersonal communication/writing skills to provide clear and concise information to clients and their representatives, as well as other ministry staff. Approaches difficult conversations proactively by anticipating concerns and preparing ways to address them in plain language. Ability to deal effectively with difficult, volatile, sensitive and/or stressful situations and behaviours. Also, ability to demonstrate respect, patience and understanding when dealing with cultural diversity or decreased capacity.

Creative Problem Solving	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Focuses on continuous improvement and increasing breadth of insight:</p> <ul style="list-style-type: none"> • Asks questions to understand a problem • Looks for new ways to improve results and activities • Explores different work methods and what made projects successful; shares learning • Collects breadth of data and perspectives to make choices 	<p>Position utilizes analytical and mathematical skills to calculate and assess optimum income structure when determining benefits for seniors within the parameters of complex retroactivity policies. Has the ability to evaluate a diverse array of financial documents and legal documents, such as Enduring Power of Attorney, to make appropriate decisions on validity and eligibility for clients.</p> <p>Position actively seeks input from other coordinators and Team Leads for direction on more complex issues.</p>
Systems Thinking	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Considers inter-relationships and emerging trends to attain goals:</p> <ul style="list-style-type: none"> • Seeks insight on implications of different options • Analyzes long-term outcomes, focus on goals and values • Identifies unintended consequences 	<p>Position is regularly involved in systems testing for enhancements and changes to the Alberta Seniors Database. Position provides feedback and suggestions to ensure changes are an accurate reflection of the proposed changes. Looks at the system holistically to ensure that no impacts to other programs occur due to program changes.</p>