

Code: 5348

Title: PUBLIC FIDUCIARY ENTITLEMENTS SPECIALIST

SUMMARY: Researches and verifies medical, retirement and benefits information. Applies, monitors and renews medical, retirement, pension and other entitlement benefits. Collaborates and coordinates with Public Fiduciary case management/legal staff to create benefits profile.

DUTIES/RESPONSIBILITIES: (Work assignments may vary depending on the department's needs and will be communicated to the applicant or incumbent by the supervisor)

Researches and applies for Arizona Health Care Cost Containment System (AHCCCS), Arizona Long Term Care System (ALTCS) and other public benefits/entitlements;
Researches, requests and compiles requisite client documentation for application processes;
Calculates and processes share of cost payments for all ALTCS recipients;
Contacts health insurance, retirement and benefits programs to ascertain and verify eligibility;
Participates in development of new unit operating procedures and/or reviews and makes recommendations or changes to existing unit policies and procedures;
Represents the work unit at internal and external client staffing and administrative hearings;
Collaborates with department case managers/staff to create clients' benefits eligibility profile as departmental expert for a variety of state and federal benefit and entitlement programs;
Coordinates and facilitates the establishment of Miller and Special Needs trusts and other trust vehicles pursuant to federal regulations;
Researches, analyzes and compiles requisite documentation for benefits applications;
Completes medical/financial applications and monitors their process;
Monitors clients' monetary/health benefits and ensures timely and thorough annual redeterminations;
Researches, prepares and prosecutes administrative appeals for benefit denials on behalf of Public Fiduciary clients;
Maintains specialized databases to input and retrieve data;
Confers with staff regarding selection of appropriate trust vehicles for Public Fiduciary clients;
Prepares and maintains updates to the department procedures manual;
Collaborates with legal staff in drafting trust documents and monitors trust in coordination with trustee;
Maintains time records and bills client estates for rendering of professional services;
Provides benefit-expert testimony in court.

KNOWLEDGE & SKILLS:

Knowledge of:

- rules, regulations, policies and procedures applicable to client benefit and entitlement programs and their application processes;
- AHCCCS, ALTCS and Medicare rules, policies and procedures and their application processes;
- federal regulations and guidelines governing various types of special needs trusts;
- scope and eligibility criteria for public and private benefits' programs and their application processes;
- medical insurance and retirement benefits guidelines and packages;
- research techniques and report writing;
- benefit appeal procedures;
- business/accounting principles with respect to client billing for professional services.

Skill in:

- application, coordination and renewal of clients' benefits;
- researching, preparing and monitoring applications for AHCCCS, ALTCS, Medicare and other public benefits/entitlements;
- researching verifying and/or applying for clients' medical insurance, retirement and other private benefits;
- interpreting and applying rules, regulations, policies and procedures governing public and private benefits and entitlements;
- managing special needs trusts;
- preparing and updating procedure manuals;
- effective advocacy and communication skills;
- communicating effectively, orally and in writing;
- inputting and retrieving data in specialized databases.

MINIMUM QUALIFICATIONS:

EITHER:

(1) Four years of experience performing paraprofessional administrative tasks related to the area of fiduciary, disability benefits, probate, estate planning, social security or Employment Retirement Income Security Act (ERISA) law.

OR:

(2) Valid certification as a legal assistant or legal paraprofessional from an accredited college or technical trade school and two years of experience performing paraprofessional administrative tasks related to the area of fiduciary, disability benefits, probate, estate planning, social security or Employment Retirement Income Security Act (ERISA) law.

(Additional relevant experience and/or education, from an accredited school, may be substituted.)

OTHER REQUIREMENTS:

Special Notice Items: Due to the need for access to courts, law enforcement, detention or correctional facilities, some positions in this classification may require satisfactory completion of a personal background investigation by law enforcement agencies. If employment is based upon possession of certification or licensure, failure to maintain the required licensure/certification shall be grounds for termination.

Physical/Sensory Requirements: Physical and sensory abilities will be determined by position.

This class specification is intended to indicate the basic nature of positions allocated to the class and examples of typical duties that may be assigned. It does not imply that all positions within the class perform all of the duties listed, nor does it necessarily list all possible duties that may be assigned.