

Eligibility/Financial Worker Checklist

The Purpose of this checklist is to be used as guidance and support for employees.

Use of columns on this checklist:

Priority: Use to prioritize learning for the new employee using months when topic needs to be learned or mastered. Or can use A, B, C, etc. for job priorities.

Assigned: Check off tasks that are assigned to this employee. Or can use to assign a trainer/job shadow for that topic.

Mastery Levels: Check off when employee reaches these levels:

1. Awareness/Exposure
2. Basic Working Knowledge
3. Proficient

Comments: Use for any notations, areas needing further clarification, etc.

Eligibility/Financial Worker Checklist

Knowledge/Skills/Abilities	Priority	Assigned	1	2	3	Comments
Role of Eligibility/Financial Worker						
Office Procedure/Branch Organization						
Desk/Work Flow Organization						
Communication Techniques						
Dealing With Difficult People						
Confidentiality						Generic Program Elements A
Narration						FS Worker Guide 4 Oregon ACCESS Help
Case Record Set Up						SPD Worker Guide G.5 SSAM IV
Alternate Format						SPD Worker Guide A.2
Prioritization Of Tasks						
Acronyms i.e.: not program specific (AFS/DHS/AAA)						SPD Glossary SSAM I.B
Overview of Clients i.e.: Who Does SDSD Serve						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

File Cabinet Organization						
Client Rights and Responsibility						Generic Program Elements B
Interviewing Skills						

Program/Procedure Elements	Priority	Assigned	1	2	3	Comments
Decision Notices						461 Rules Generic Program Elements D Computer Guide
Special Needs						OSIP Program Manual H Computer Guide SDS 437/ DHS 437
Date Stamps						
Acronyms						SPD Glossary SSAM I.B
Hearings						AFS 443 , AFS 442 Generic Program Elements I
Overview of Programs						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Eligibility Issues, Program Specific FS GA OHP QMB/SMB/SMF/SMP OSIP/OSIP						Specific Program Manuals
Standard Charts						SPD Worker Guide E.5
Intake-On The Job Training						
Verification						SPD Worker Guide B.1
Effective Dates						
Case Changes						
Redeterminations						
Protected Eligibility (DAC's etc.)						OSIP Program Manual G
Case Transfer Process						SSAM IV.C
Deceased Clients						
Application Time Frames						461-115
Office Procedures i.e.: Incoming Mail/Transfers IN						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

and Out						

Computer/Equipment Elements/Coding	Priority	Assigned	1	2	3	Comments
Computer Inquiry (WEBM find)						Computer Guide
On-Line Manual Navigation/Transmittals						SPD Staff tools
Provider Inquiry						Basic Screens Help Menus Computer Guide - Error Message
ACCESS						
Alternate Formats						Computer Guide III-D-105
e-mail, provider database, under/over payments, e-mail, Help Menus						
Discrepancy Reports						View Direct Oregon ACCESS
Case Record Set Up-Electronic						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Basic Screens						
Case Changes, Coding Of						
Special Needs, Coding Of						OSIP Program Manual H Computer Guide SDS 437/ DHS 437
Case Transfer Process						
Deceased Clients						
Office Equipment e.g.: Location/How to Use						
RACF						Local Sub-Administrator
ACCESS/UCMS Coding/ FSMIS Coding						Computer Guide
Computer Deadlines						Monthly systems/production calendar

Referrals/Resources	Priority	Assigned	1	2	3	Comments
Adult protective service						411-020
VRD						
Mental Health						
Developmental Disabilities						
Veterans						
EPD/EI						
Managed Care Plans ENCC'S						OMAP WG #5
Medical Review Team (Local)						
Presumptive Medical Disability Determination Team (Salem)						OSIP Program Manual WG.4
Social Security Administration						
SSI Liaison						GA Program Manual WG.1
Legal Services						
Drug and Alcohol						

1 = Awareness 2 = Basic Working Knowledge 3 = Proficient

Transportation						
Lifeline/OTAP/Link Up America						SPD Worker Guide D.6 461-155-0680
Local Community Resources						
Service Case Manager/PAS						
Ombudsman						
Overpayment Writer						Generic Program Elements G
ACCESS Resource Directory						Oregon ACCESS
Resource directory						Oregon Community Services Directory
Estates Administration Unit						Generic Program Elements K
Agency/Community Partners						
Other Resources (CHIP/TANF/MHDDSD)						

Miscellaneous	Priority	Assigned	1	2	3	Comments
Mass Changes						Generic Program Elements E
Moving From One Living Situation to Another						
Time Reporting						DHS Payroll web page
Emergency Procedures						
Training						On-Line Training Registration System
Worker Of The Day/Screening/Desk Partner/Absences						
Case Record Set Up-Hard Copy						
Replacing Benefits						Generic Program Elements C
Quality Control						Generic Program Elements J