

Position Title: Entitlements Coordinator
Department: Entitlements
FLSA Status: Exempt
Reports to: Entitlements Director
Prepared by: Human Resources
Revision Date: July 2025

Position Overview

Reporting directly to the Entitlements Team Lead and indirectly to the Director of Entitlements and working under general supervision, the employee verifies, obtains and maintains all necessary income and benefits (entitlements) for Wards of the Public Guardian. Completes all necessary applications, annual redeterminations and financial reviews and payee changes required by state, county, and federal agencies, foreign governments, pensions, and VA, so that Wards can obtain and maintain applicable benefits by performing the following duties.

Primary Accountabilities

Acts as liaison between the Public Guardian and local state, federal and private agencies including: Social Security Administration, Department of Children and Families (DCF), Department of Veterans Affairs (VA), Pension companies, United States Citizenship, and Immigration Services (USCIS), etc.

Communicates regularly with various local agencies and submits all necessary applications and forms required for benefit approval. Interacts with key personnel regularly to secure and maintain eligibility for all benefits. Follows up, through to benefit approval.

Notifies the appropriate agencies of any changes in clients' status, such as residence changes, changes in income or assets, etc. and/or when clients are restored or appointed a successor guardian.

Applies for all government (and non-government) benefits applicable to clients, updates and adds new entitlements data into GMS and documents in the activity logs

Submits Application to be Selected as Representative Payee (SSA-11) to Social Security Administration and follows up monthly to verify income (or no income) and obtain any additional information provided by SSA. Submits initial letters for payee changes to verify any Pension, Annuity, Veterans benefits and any other income reported to be received by the Ward. Follows up monthly until the agency is assigned as client's payee or fiduciary.

Requests authorization to collect PFS when retroactive SSA benefits are approved and received. Track through to approval and submit for payment. Enters activity logs and updates spreadsheets.

Researches and compiles information to complete applications and annual redeterminations of Medicaid benefits. Maintains and reviews all applicable reports monthly for ongoing follow up on all pending applications or changes in benefits. Communicates any issues with the assigned Case Manager and supervisors immediately.

Investigates and solves problems regarding clients' benefits to maintain or gain access to benefits.

Corresponds with the assigned Case Managers, facilities, outside agencies, or health care providers to obtain the medical documentation required by federal, state, and local agencies to apply for benefits, such as disability. Follows up with SSA Office of Disability Determinations to inquire if additional

documentation is required to approve disability. Follows up with assigned Case Manager, if additional medical or other information is needed or if the information has not been provided timely. Reports any disability or other benefit denials.

Maintains current with federal and state government benefits changes and communicates this information to the appropriate staff and/or departments.

For clients with excess resources, assists the assigned case manager in coming up with solutions to reduce excess assets so the client can obtain or maintain eligibility for SSI or Medicaid (ICP, HCBS, etc.)

Reviews income and reports any Wards requiring a Qualified Income Trust (QIT) to qualify them for Medicaid. Submits all necessary requests and income verification to legal for court order authorizing a QIT.

When Qualified Income Trust (QIT), Pooled or Supplemental Needs Trust are requested, coordinates with legal and bookkeeping through to the opening of account so information can be reported to the appropriate government agencies (SSA, DCF) timely for Medicaid approval. Provides a copy of court order authorizing trust, Trust Joinder Agreement or Trust Agreement to Social Security Administration or Department of Children and Families for approval by their legal departments, so the Ward obtains or maintains eligibility for SSI or Medicaid benefits.

Documents all client related activity in the activity logs within 24 hours of activity in GMS. Follows up on any pending issues, through to resolution.

Maintains appointments and monitors all deadlines for all applications and annual review of all Medicaid and other benefits.

Works directly with the assigned Intake Coordinators and Case Managers to verify client's legal status, assists with the application for residency, replacement of USCIS documents or Naturalization, as necessary, for benefit approval purposes.

Additional responsibilities may be assigned as needed.

SUPERVISORY RESPONSIBILITIES

This job has no supervisory responsibilities.

Education, Skill Requirements and Other Essential Functions

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE

Associate's degree (AA) in Business or Social Work and a minimum of two (2) years' experience working in a related social services field. A combination of education and experience will be considered.

Must be proficient in computer skills, especially in Microsoft Office applications such as Word, Excel, Outlook, for email, and Internet, as well as other internal and external software applications.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general periodicals, professional journals, general procedures, and government regulations. Ability to write reports for the Probate Court of Dade County, Florida, and general correspondence. Ability to effectively present information and respond to questions from groups of agency personnel, clients, and the general public. Bilingual in English and Spanish is preferred to facilitate easier communication with facilities, wards, family members, etc.

MATHEMATICAL SKILLS

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

REASONING ABILITY

Ability to define practical problems, collect data, establish facts, and draw valid conclusions. Ability to interpret a variety of technical instructions, procedures, and deal with several abstract and concrete variables.

CERTIFICATES, LICENSES, REGISTRATIONS

None required.

ADDITIONAL RESPONSIBILITIES AND REQUIREMENTS

Must have reliable transportation and be capable of unrestricted travel in the performance of duties.

CRIMINAL, DRIVING & CREDIT VERIFICATIONS

As a condition of employment, requires an acceptable criminal background verification, driving record, and credit check during the pre-employment process and throughout employment which is reviewed, verified, and approved according to state guidelines.

Working Conditions

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee is occasionally required to stand, walk, and reach with hands and arms. The employee must regularly lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, and ability to adjust focus.

WORK ENVIRONMENT

This job operates in a professional indoor and temperature-controlled work environment. This role routinely uses standard office equipment such as computers, phones, and photocopiers. The noise level in the work environment is usually busy with phones and other working personnel. There are no hazardous conditions encountered in this job. This position may be performed remotely as determined by the Agency.

Read, acknowledged, and signed by: _____ on _____.

Signature

Date

Print Name