



**ORANGE COUNTY UNITED WAY
JOB DESCRIPTION**

JOB TITLE: ENROLLMENT SPECIALIST	REPORTING TO: SENIOR MANAGER, COMMUNITY PROGRAMS
DEPARTMENT: 211 OC	POSITION: FULL-TIME/NON-EXEMPT

Purpose of Position

The Enrollment Specialist plays a vital role in supporting individuals and families by facilitating access to essential public assistance programs. This position primarily involves conducting eligibility assessments and completing applications on behalf of clients for programs such as CalFresh (SNAP), Low-Cost Utility Assistance, California Alternative Rates for Energy (CARE), and other approved services. The Enrollment Specialist provides compassionate, client-centered support via phone and community outreach, ensuring that clients receive the benefits they are entitled to.

Key Duties and Responsibilities

- Conduct comprehensive eligibility screenings and assessments to determine client qualification for public assistance programs.
- Complete applications on behalf of clients using platforms such as BenefitsCal (CalFresh and Medi-Cal), including obtaining consent, answering questions, and uploading required documentation.
- Maintain accurate records and reporting for all enrollment activities and referral services.
- Provide follow-up support via phone and text to ensure continuity of benefits and resolve any issues.
- Participate in community outreach events across Orange County to promote program awareness and access.
- Advocate for clients experiencing barriers to benefit access, including follow-up on application status and resolution of issues.
- Deliver first-contact resolution by addressing client needs effectively during initial interactions with 211OC.
- Collaborate with internal teams and external community organizations to share best practices and enhance service delivery.
- Assess immediate client needs and provide referrals to appropriate community resources.
- Develop expert-level proficiency in 211OC's software systems, including the Community Information Exchange database, telephony, softphone, texting platforms, and administrative tools.
- Empower clients to make informed decisions about services that best meet their needs.
- De-escalate challenging situations and provide crisis intervention when necessary.
- Troubleshoot service gaps and collaborate with I&R Specialists and the Resource Department to identify alternative solutions.
- Assist clients in problem-solving when no direct services are available.
- Balance responsibilities between benefits enrollment and general 2-1-1 call handling based on



call volume and staffing needs.

- Advocate for clients who have been denied services and assist in navigating appeals or alternative options.
- Provide basic technical support to clients experiencing issues with online applications or systems.
- Perform other duties as assigned to support departmental goals and client outcomes.

Job Requirements /Technical Knowledge

- High School Diploma required; BA/BS in Human Services or related field preferred.
- Minimum of one year of experience working directly with individuals and families in crisis or underserved communities.
- Prior experience in information and referral services or human services is highly desirable.
- Bilingual proficiency in English and Spanish (verbal and written) is required.
- Strong interpersonal, communication, and problem-solving skills.
- Ability to work independently and collaboratively in a fast-paced, client-focused environment.
- Commitment to equity, inclusion, and advocacy for vulnerable populations.

Compensation

- Commensurate with experience, education, and market, \$21-\$22.50 per hour. Competitive benefits.

Core Competencies

- **Customer Service** - Manages difficult or emotional customer situations; responds promptly to customer needs; solicits customer feedback to improve service; responds to requests for service and assistance; meets commitments.
- **Interpersonal Skills** - Maintains confidentiality; listens to others without interrupting; keeps emotions under control; remains open to others' ideas and tries new things.
- **Oral Communication** - Speaks clearly and persuasively in positive or negative situations; listens and obtains clarification; responds well to questions; participates in meetings.
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information.
- **Teamwork** - Exhibits objectivity and openness to others' views; gives and welcomes feedback; contributes to building a positive team spirit; puts success of team above own interests.
- **Professionalism** - Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration, regardless of status or position; accepts responsibility for own actions; follows through on commitments.
- **Language Skills** - Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization.

Company Standards

All employees, in performing their respective tasks and duties, are to perform quality work within deadlines, with or without direct supervision; interact professionally with other employees, customers, and suppliers; work effectively as a team contributor on all assignments; and work independently while understanding the necessity for communicating and coordinating work efforts with other employees



and organizations. Willing to embrace change and new technologies. Commitment to the values and mission of Orange County United Way.

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 frequently required to be able to remain in a stationary position 75% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, records, and office machinery. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine and computer printer. Occasionally ascends/descends stairs, and constantly positions self to maintain computers in the office, including under the desks. The person in this position frequently communicates with coworkers and customers who have inquiries about our business operations and the community we service; therefore, the person must be able to exchange accurate information. The employee must occasionally lift and/or move up to 25 pounds.

Send Cover Letter and Resume To:

recruiting@unitedwayoc.org

Orange County United Way
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www.unitedwayoc.org