Checklist for Onboarding Newly Hired Elder Benefit Specialists

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**Instructions:** Congratulations on your new position of elder benefit specialist! Benefit specialists make an incredible impact on individuals’ lives and create systemic change. Thank you for dedicating your skills to advancing equity and independence for older adults.

This checklist is designed to help onboard new elder benefit specialists (EBSs). The tasks described in this checklist are to be completed within the first year of hire. The tasks are arranged in the suggested order of completion. The exact timing and order for when you complete the tasks may be different. After each task’s description is information to guide you in completing the task.

It is recommended that EBSs complete the tasks listed in [Month 2](#_Tasks_to_complete_2) before meeting with clients.

Ask questions about how to complete the tasks in this checklist to:

* Your supervisor if your question is about your agency’s policies and processes or community resources and agencies.
* Your [program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryEBS) if your question is about training, sharing files for technical assistance, or how to work with your clients.
* The Employment Resources, Inc. (ERI) helpdesk at help@eri-wi.org if your question is about the online courses or learning management system (LMS).
* The [EBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) if your question is about the EBS program policies and processes, including how to use the PeerPlace reporting and case management system and the EBS or ADRC-Aging SharePoint sites.
* The [Wisconsin SHIP director](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) if your question is about the State Health Insurance Assistance Program (SHIP).
* The Department of Health Services’ (DHS’s) BADR Tech Team (dhsbadrtech@dhsi.wisconsin.gov) if your question is about accessing a DHS data system.

Tasks to complete on Day 1

[ ]  Request access to DHS data systems. Use these [instructions](https://www.dhs.wisconsin.gov/forms/f02000a.pdf) to complete the required forms for each system.

[ ]  You **must** use these data reporting and file sharing systems:

1. [ ]  [Create a WILMS ID](https://register.wisconsin.gov/AccountManagement/default.aspx) for SharePoint to access the [EBS SharePoint](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Home.aspx) and [ADRC-Aging SharePoint](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Home.aspx) sites.
2. [ ]  Click the "Create Your MyWisconsin ID" on the [MyWisconsin ID webpage](file:///%5C%5Cdhs.wistate.us%5C1ww%5CControl%5CDphCtl%5CBadr-Ooa%5CElder%20Benefit%20Specialists%5COrientation%20Materials%5COnboarding%20Checklist%5C1.%09Click%20the%20%22Create%20Your%20MyWisconsin%20ID%22%20on%20the%20MyWisconsin%20ID%20web%20page%20to%20register%20for%20your%20MyWisconsinID%20account.) to register for your MyWisconsinID account. Enter your work email address as your MyWisconsinID. You must use your work email address to access PeerPlace.
3. [ ]  Have your supervisor complete [Form 02000](https://www.dhs.wisconsin.gov/library/collection/f-02000) to request your account for the [PeerPlace reporting and case management system](https://fs.harmonyis.net/adfs/ls/?wa=wsignin1.0&wtrealm=https%3a%2f%2flogin.harmonyis.net%2f_trust%2f&wctx=https%3a%2f%2flogin.harmonyis.net%2f_layouts%2fAuthenticate.aspx%3fSource%3d%252F) (specifically the EBS and SHIP programs).
4. [ ]  After your supervisor submits Form 02000, you will receive an email asking you to sign a user agreement. The agreement must be completed within seven days of the F-02000 submission. You must log in with your MyWisconsin ID to complete this step.

[ ]  You **may** use these [data reporting systems](https://www.dhs.wisconsin.gov/em/index.htm):

[ ]  CARES Worker Web (CWW).

[ ]  Electronic Case File (ECF).

[ ]  Forward Health interChange (FHiC).

[ ]  Request access to non-DHS data systems. You **must** use these systems:

[ ]  Complete the [online registration](https://eri-wi.org/adrc-enroll/) to enroll in the Employment Resources, Inc. (ERI) [learning management system](https://eri.litmos.com/account/Login) (LMS). Online courses for EBS initial training are accessed through the LMS You will receive an email with your login information within three business days.

[ ]  Request access to the State Health Insurance Assistance Program Technical Assistance (SHIP TA) Center by going to <https://portal.shiptacenter.org/Login.aspx> and clicking the green "Submit a request to be a registered user" button.

[ ]  Add widhs@public.govdelivery.com to your email’s safe senders list to ensure you receive important announcements about training events, reporting requirements, and funding opportunities.

# Tasks to complete in Week 1

Orientation

[ ]  Meet your program attorney and schedule your one-on-one orientation. Your program attorney may contact you to schedule this meeting

[ ]  Meet with the training coordinator. DRW’s training coordinator will contact you to schedule this meeting. They will review the [initial training schedule](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/Current%20Training%20Calendar%20with%20Initial%20Trainings.pdf) and how to access initial training materials and live virtual and in-person group events.

Training

[ ]  Add training events to your calendar.

* County EBSs: Add dates for the [initial](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Onboarding.aspx) and [ongoing training](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Live%20Trainings.aspx) events on SharePoint to your calendar.
	+ For ongoing training, attend the events offered by the organization where your program attorney works.
	+ Set aside time in your calendar to complete any listed prerequisites prior to the trainings.
* Tribal EBSs: Contact your [program attorney at Judicare](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) to schedule your Basic Training.

[ ]  Begin online training. Start with these [LMS courses](https://eri.litmos.com/account/Login):

[ ]  Benefits Counseling

[ ]  ACCESS and CARES Worker Web Query Only (if you are requesting access to these systems)

**Note**: Certain modules of the Medicare course are linked to the SHIP online counselor certification and training (OCCT) courses in the [SHIP TA Center](https://portal.shiptacenter.org/Login.aspx). You must log into the [SHIP TA Center](https://portal.shiptacenter.org/Login.aspx) to complete these modules to complete the Medicare course. The Medicare course may not appear “complete” in the LMS because of this; that is okay.

# Tasks to complete in Week 2

Policy

[ ]  Familiarize yourself with the [ADRC-Aging Programs Operations Manual](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Home.aspx) on the ADRC-Aging SharePoint site. Read these chapters:

[ ]  Elder and Disability Benefit Specialist Programs ([P-06062-05](https://www.dhs.wisconsin.gov/publications/p03062-05.pdf))

[ ]  Elder Benefit Specialist Program ([P-03062-05b](https://www.dhs.wisconsin.gov/publications/p03062-05b.pdf))

[ ]  Time and Task Reporting ([P-03062-10](https://www.dhs.wisconsin.gov/publications/p03062-10.pdf)). Note: only EBSs in ADRCs and Tribal Nations time report; ask your supervisor if this applies to you.

[ ]  Watch the latest recorded SHIP and MIPPA grant orientation in [Vimeo](https://vimeo.com/showcase/9535365) (password: Medicare101).

SharePoint

[ ]  Review the [EBS SharePoint site tour](https://share.health.wisconsin.gov/ltc/teams/EBS/Shared%20Documents/EBS%20SharePoint%20Site%20Tour%20Transcript.docx) video to learn SharePoint terminology and how to navigate through the EBS SharePoint site. See also the [How to Use SharePoint page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Help.aspx).

[ ]  Set an Alert using [these instructions](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Help.aspx#Alerts) on the:

[ ]  [Announcements list](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/Announcements/AnnouncementsList.aspx)

[ ]  [EBS Collaboration Library](https://share.health.wisconsin.gov/ltc/teams/EBS/EBSCollaborationLibrary)

[ ]  [EBS Discussion Board](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/EBSForum)

Recommended alert settings:

* + All changes
	+ Someone else changes a document
	+ Send a daily summary

Contact information

[ ]  Update your contact information on the [EBS SharePoint Directory](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryEBS).

1. Find the listing for your agency.
2. Click the ellipses (…) and Edit.
3. Enter the information requested in the form and Save.

[ ]  Confirm that your agency’s contact information is correct on the [DHS Find a Benefit Specialist webpage](https://www.dhs.wisconsin.gov/benefit-specialists/counties.htm). If it is incorrect, send an email with the correct information to the [EBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm).

# Tasks to complete in Week 3

[ ]  Begin PeerPlace training. Start with these videos on the [ADRC-Aging SharePoint](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/PeerPlace_BenSpec.aspx) site:

[ ]  [PeerPlace Core Functionality](https://vimeo.com/showcase/11338036/video/1010218560)

[ ]  [PeerPlace Custom Forms and Workflows](https://vimeo.com/showcase/11338036/video/1025223884)

[ ]  [PeerPlace Advanced Reporting](https://vimeo.com/showcase/11338036/video/1036724837)

[ ]  [PeerPlace Resource Directory Users](https://vimeo.com/showcase/11338036/video/1037447151)

[ ]  Meet with your program attorney. Your program attorney will contact you within the first couple of weeks to introduce themselves and start to get to know you. Over time, you will discuss:

* Local supervisor vs. program attorney roles.
* Annual review process, quality review, and technical assistance guidelines.
* Confidentiality requirements.
* What it means to be an advocate.
* Relevant sections of the state Operations Manual.

Confidentiality

[ ]  Review agency policies such as confidentiality and grievance procedures. EBSs are bound by strict confidentiality standards. These standards may differ than the standards that apply to other staff within your agency.

[ ]  Review the confidentiality policy described in the [Elder Benefit Specialist Program chapter (P-03062-05b)](https://www.dhs.wisconsin.gov/publications/p03062-05b.pdf) of the state Operations Manual.

Consent

[ ]  Obtain your agency’s standard consent and release forms; clients may need to sign agency-specific consent and release forms for you to be able to assist with their case.

[ ]  Ask your program attorney for their client services agreement form. The GWAAR, Judicare, and SeniorLAW forms can be found on the EBS SharePoint site:

* [Document Library](https://share.health.wisconsin.gov/ltc/teams/EBS/Shared%20Documents/Forms/Forms.aspx#InplviewHashdd5008f6-a080-4002-962d-205dcc28d3be=FilterField1%3DTopic-FilterValue1%3DEBS%2520program)
* [Home page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Home.aspx) under Caseload Management and Casework Guidance
* [Onboarding page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Onboarding.aspx) under Important Documents for New EBSs

# Tasks to complete in Week 4

[ ]  Practice entering data in the PeerPlace reporting and case management [training environment](https://peerplace-training.dhs.wisconsin.gov/).

Partners

[ ]  Find your local [disability benefit specialist](https://www.dhs.wisconsin.gov/benefit-specialists/counties.htm) (DBS). DBSs serve older adults under age 60. Review the DBS’s referral process to learn how you can receive referrals for clients clients who transition out of the DBS program.

[ ]  Learn about long-term care programs, including the application processes and benefits. ADRCs are the starting point to accessing publicly funded long-term care services, which includes the [Family Care](https://www.dhs.wisconsin.gov/familycare/index.htm) and [I Respect, I Self-Direct (IRIS)](https://www.dhs.wisconsin.gov/iris/index.htm) programs.

[ ]  Find your local [Social Security Administration (SSA) field office](https://www.ssa.gov/locator/). Consider writing a letter or making a phone call to introduce yourself to the office manager. Ask the manager for local procedures on the best ways to contact the office for assistance and follow-ups.

[ ]  Confirm that your agency is a secure email partner with SSA. See the [SSA case escalation guidelines (P-02009 22-08)](https://www.dhs.wisconsin.gov/publications/p02009-22-08.pdf) for details.

[ ]  Find your [regional Income Maintenance (IM) Consortium and local IM agency](https://www.dhs.wisconsin.gov/forwardhealth/imagency/index.htm). Ask your supervisor for local procedures on the best ways to contact the office for assistance and follow-ups.

# Tasks to complete in Month 2

[ ]  Tasks to complete before meeting with customers:

[ ]  Finish the [LMS courses](#LMS) from [Week 1](#_Tasks_to_complete).

[ ]  Finish the [PeerPlace training](#PeerPlace) from [Week 3](#_Tasks_to_complete_1).

[ ]  Job-shadow an experienced EBS. This person may be at your agency or a [nearby agency](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryEBS/ByAgency.aspx). You may meet in person or virtually.

[ ]  Determine how you will maintain and organize case files. Consider functionality, reliability, and confidentiality when making these decisions. Talk to your supervisor about agency-specific expectations.

[ ]  Determine how you will track tasks and remember important dates such as appeal deadlines and hearing dates. Consider functionality, reliability, and confidentiality when making these decisions. Talk to your supervisor about agency-specific expectations.

# Tasks to complete in Months 3-12

Partners

[ ]  Find your local [department of health or social services agency](https://www.dhs.wisconsin.gov/areaadmin/hsd-programs.htm) and learn about the services it provides. Consider meeting with their staff. It can be helpful to meet with staff in individual units such as income maintenance and mental or behavioral health to learn what each unit does.

[ ]  Find your local [Veterans Services office](https://dva.wi.gov/Pages/benefitsClaims/Veterans-Service-Organizations.aspx) (VSO). VSOs can provide an overview of veterans’ benefits and assist with mutual clients.

[ ]  Find your local [Division of Vocational Rehabilitation (DVR) office](https://dwd.wisconsin.gov/dvr/about/locations.htm). DVR helps people with disabilities obtain, maintain, and advance employment.

[ ]  Find your local [independent living center](https://www.dhs.wisconsin.gov/disabilities/physical/ilcs.htm) (ILC). ILCs are private non-profit agencies designed and operated by individuals with disabilities.

Training and certification

[ ]  Complete the EBS program [initial training](#_Tasks_to_complete).

[ ]  Tasks to complete to become a certified SHIP counselor:

[ ]  Pass the certification exam in the [SHIP TA Center](https://www.shiptacenter.org/) after completing the Medicare components of initial training.

1. Log in to the SHIP TA Center.
2. Click the green Training and Certification (OCCT) button in the upper
3. right-hand corner.
4. Click Certification Tool.
5. Click on the exam.

The exam is open book. There is no time limit; it may take about an hour. If you do not pass, review the questions you missed and retake it.

[ ]  Sign and submit the [Confidentiality Agreement](https://www.dhs.wisconsin.gov/forms/f02829.pdf) to the [Wisconsin SHIP director](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryState/SHIP.aspx) after passing the exam. Detailed instructions are available on the [SHIP & MIPPA page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/SHIP%20%26%20MIPPA.aspx) of the EBS SharePoint site.