



# Disability Benefit Specialist Program

## 2014 Summary Report

**Disability Benefit Specialists (DBS)** help people with disabilities **ages 18-59** to understand and access Social Security, Medicaid, Medicare, health insurance and other public and private benefits. They work with people to avoid common errors by explaining benefits' eligibility criteria, appeal options, and deadlines; filling out paperwork; gathering documents; and helping find legal representation for people who require a hearing.

### Disability Benefit Specialists Are Available Statewide.

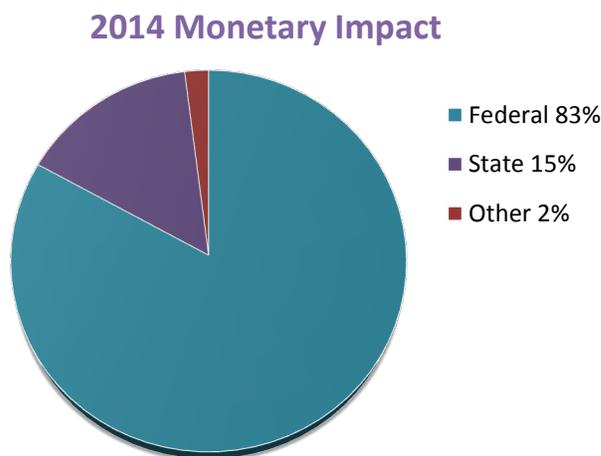
*All Aging and Disability Resource Centers (ADRCs)* across Wisconsin offer DBS services.

*The Great Lakes Inter-Tribal Council* has employed two disability benefit specialists since April 2010 to reach **tribal members** who live on or near a Wisconsin reservation.

*The Department of Health Services' Office for the Deaf and Hard of Hearing* has employed a disability benefit specialist since 2007 to serve **individuals using American Sign Language (ASL)**.

### DBS Services Make a Positive Economic Impact.

When people are able to access insurance and other programs that help with food, shelter and medical expenses, their local communities also experience a positive economic impact. DBS report the approximate value of any benefits that they help someone to obtain or retain; these data are compiled to calculate the monetary impact of DBS services. In 2014, DBS services helped to net over **\$77 million** in public benefits for Wisconsin residents, stabilizing household budgets and lessening the pressure on local crisis and emergency services. **Federal funds accounted for 83% of the benefits gained**, while State (15%) and other funds such as private donations (2%) made up the remainder.



**Estimated statewide impact** of DBS services in 2014:

**\$77,695,056**

**Average monetary impact\*** of one full-time DBS in 2014:

**\$971,188**

\*This average is based upon a total of 80 FTE positions



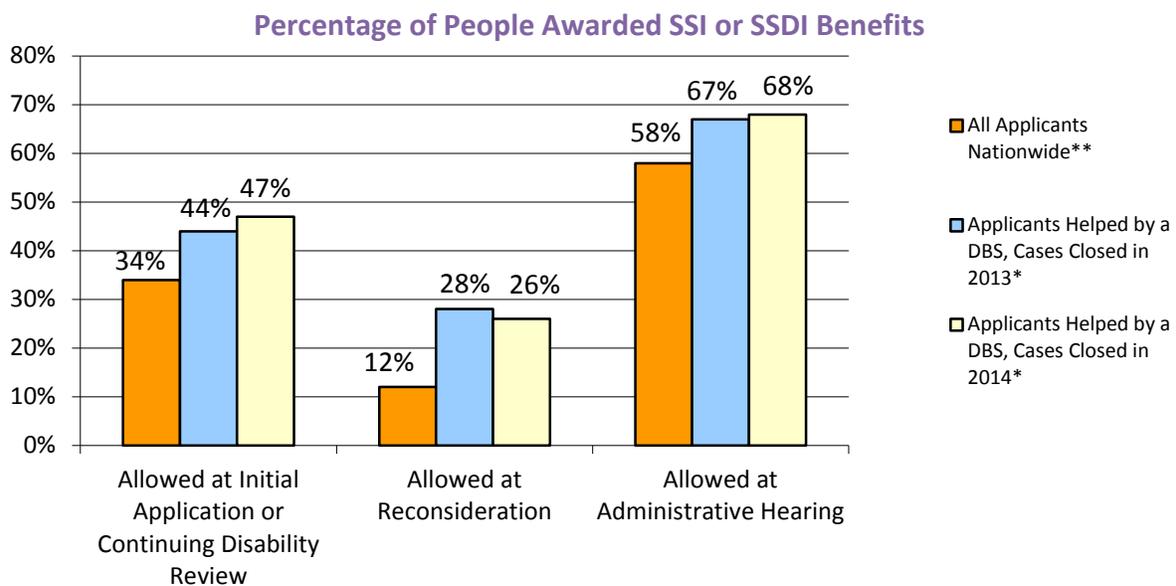
## DBS Help With a Wide Range of Benefits Issues

Disability benefit specialists help people resolve a wide range of benefits issues. A single case may involve multiple interrelated issues. The top ten issues reported for DBS cases closed in 2014 are listed in the chart below.

Top Ten DBS Case Issues of 2014	Percent of Cases 2014
SSI/SSDI Eligibility	40%
Medicaid Purchase Plan (MAPP)	14%
Medicare Part D Options/Enrollment	13%
Medicare Savings Programs (QMB, SLMB, SLMB+)	8%
FoodShare	8%
BadgerCare+	7%
SSI/SSDI Post-Entitlement Issues	6%
Medicaid Financial Eligibility	6%
Benefit Check-Up	5%
Medicare Advantage Options/Enrollment	4%

## DBS Play a Key Role in Disability Determination Cases

Disability benefit specialists play a key role in helping people to access disability benefits such as Social Security Disability Insurance (SSDI), Supplemental Security Income (SSI), Medicare and Medicaid. As illustrated below, Wisconsin's program data suggests that people who obtain help from a DBS are more likely to receive a favorable decision.



\* This data excludes cases with the outcome listed as unknown or pending and those for whom the application or appeal was withdrawn prior to the issuance of a decision. Reasons for a pending or unknown outcome at case closure may include the provision of information-only services; client withdrawal or lack of contact; or referral to a private attorney.

\*\* Social Security Administration Fiscal Year 2013 Continuing Resolution Operating Plan, Appendix 2, November 2012.



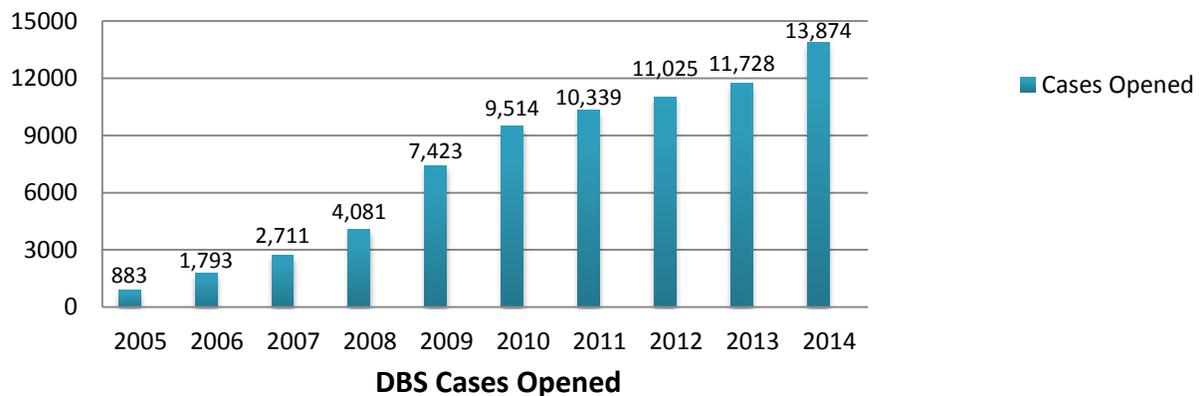
## DBS Serve Record Numbers

A specialist opens a “case” for each issue or set of closely interrelated issues that he or she assists a person to resolve. A case may remain open for one day or several months, depending on the nature of a person’s benefits issue. Customer issues that require less than 30 minutes to resolve are recorded as “information-only” contacts.

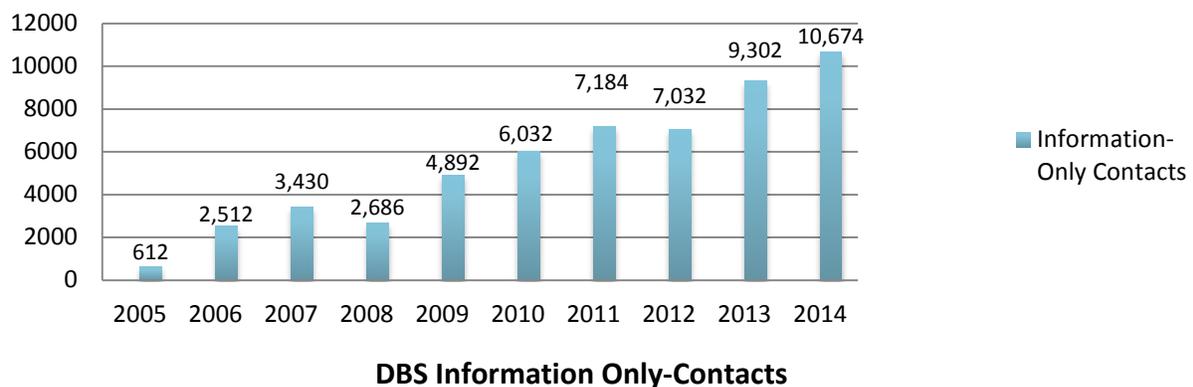
DBS Activities in 2014		Statewide	Average for One Full-Time DBS*
Numbers of Cases	Carried Over from 2013	4,078	51
	Opened in 2014	13,874	173
	Closed in 2014	13,352	167
Number of Information-Only Contacts		10,674	133

\*These averages are calculated based upon a total of 80 full-time equivalent (FTE) positions.

## DBS Program Reach Continues to Grow

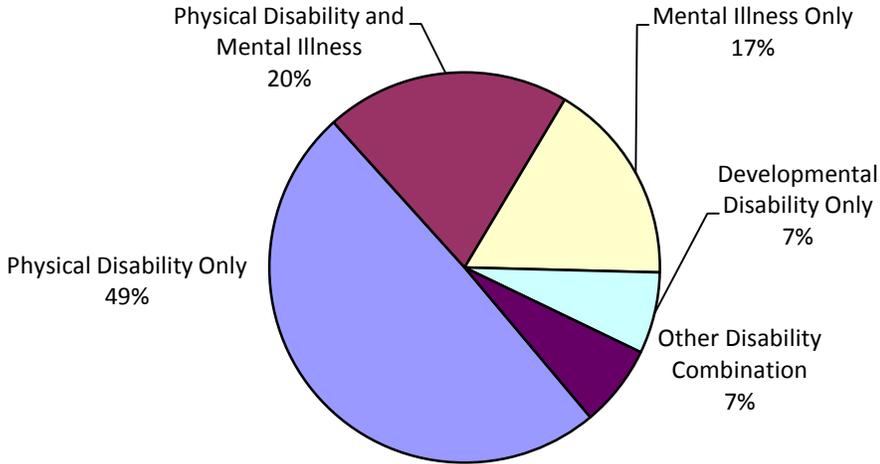


Due to recent program expansion and word of mouth, the number of people receiving DBS services continues to grow each year. Again in 2014, DBS assisted a record number of people with both cases opened and information-only contacts.



## DBS Reach Diverse Population Sectors

DBS provide services to people regardless of income-level or disability type. The program serves people aged 18 to 59, including youths with disabilities who are transitioning to adult benefits, and adults who may be seeking disability benefits for the first time, weighing their Medicare options or dealing with post-entitlement issues such as an alleged overpayment or a disability review. Elder benefit specialists (EBS) provide similar services to adults aged 60 and over.

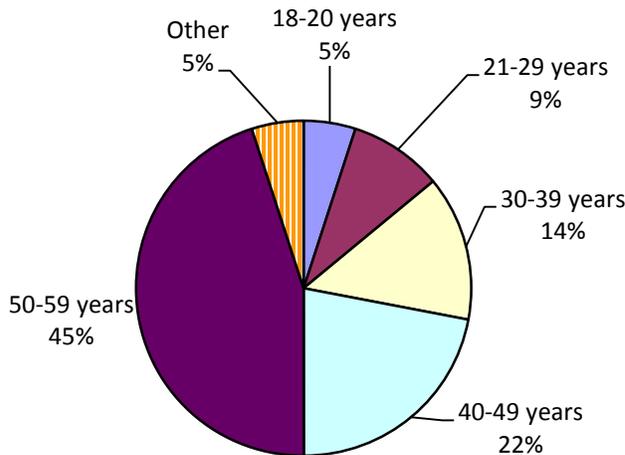


**Customer Disability\***

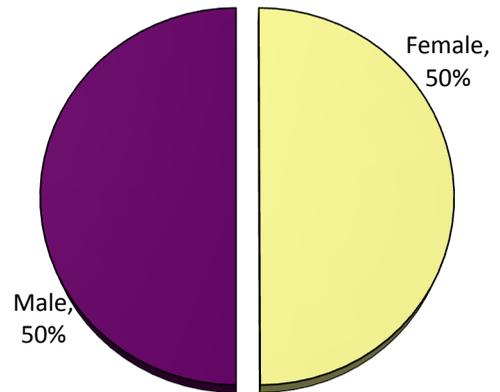
Customer Living Arrangement*	
Lives with Others	60%
Lives Alone	25%
Homeless or Shelter	4%
Residential Care	1%
Nursing Home	<1%

**Customer Income\***

**Seventy-five percent (75%)** of DBS customers had incomes at or below 120% of the Federal Poverty Level (FPL)\*



**Customer Age\***



**Customer Gender\***

\*All DBS customer demographic data are based on people for whom a case was opened in 2014 and exclude people whose demographic status was unknown or unreported.



## DBS Receive Extensive Training and Technical Assistance

Disability benefit specialists can be counted on to provide accurate, current information. They receive extensive training, are provided opportunities for skill-building, and have access to expert technical assistance.

*Wisconsin Disability Benefits Network (WDBN)* coordinates initial training for newly hired DBSs, with subject matter expertise provided through a sub-contract with Disability Rights Wisconsin. In 2014, WDBN training was provided to a total of nineteen new hires. The standard training regimen for a new DBS includes 40 hours of online training, four days of in-person training, and job shadowing of an experienced DBS.

*Disability Rights Wisconsin* provides ongoing training, technical assistance and case oversight to all disability benefit specialists. A staff of eight program attorneys, one training coordinator, and one managing attorney are employed under contract with the Department. Training topics in 2014 included:

- BadgerCare Plus
- Health Insurance Marketplace
- Wisconsin Division of Vocational Rehabilitation (DVR)
- Disability Determination Explanation (DDE)
- Vocational Matters in the Disability Determination Process
- Long-term Care Financial Eligibility
- SSI Financial Eligibility Issues
- Trauma-informed Advocacy
- Ethics and Boundaries
- SSA Work Incentive Liaisons (WILS)
- Improving Mental and Behavioral Health Services for Deaf, Hard of Hearing and Deaf-blind Individuals
- FoodShare Over Issuances and Intentional Program Violations
- Coordination of Veterans Benefits
- Social Security Auxiliary and Survivor Benefits

*Wisconsin Judicare, Inc.* provides program attorney services to the disability benefit specialists employed by Great Lakes Inter-Tribal Council, including training on benefit issues unique to tribal members, technical assistance and case oversight.

## More Information about DBS Services is Available

For more information about DBS services, including local agency contact information and customer survey results, visit the Wisconsin Department of Health Services website at <https://www.dhs.wisconsin.gov/benefit-specialists/dbs.htm> or contact the Bureau of Aging and Disability Resources at (608) 266-2536.

