



Disability Benefit Specialist Services

2013 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 to find legal representation for those who require a hearing.

Disability Benefit Specialists Are Available Statewide

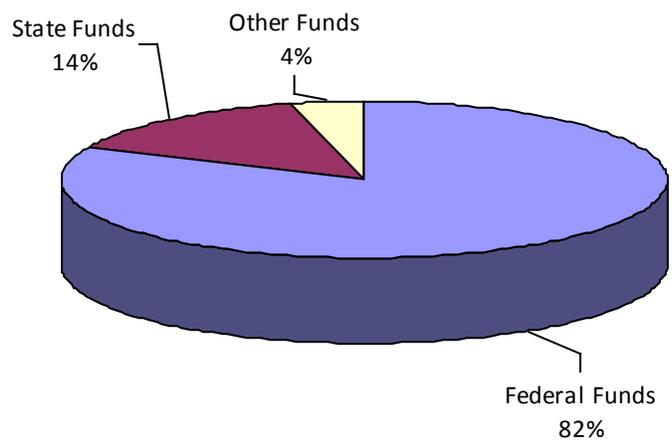
Aging and Disability Resource Centers (ADRCs) across Wisconsin now offer DBS services. In the program’s thirteenth year of operation, services were expanded to Dane, Door, Florence, Marinette and Rock counties. By year end, services were available in **41 ADRCs** covering **all 72 Wisconsin counties**.

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

The Office for the Deaf and Hard of Hearing has employed a disability benefit specialist since 2007 to reach out statewide to **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. DBSs 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 2013, DBS services helped to net over \$71 million in public benefits for Wisconsin residents, stabilizing household budgets and lessening the pressure on local crisis and emergency services. **Federal funds accounted for 82% of the benefits gained**, while State (14%) and other funds such as private donations (4%) made up the remainder.



Monetary Impact by Funding Source, 2013

Estimated statewide impact of DBS services in 2013:

\$71,338,092

Average monetary impact* of one full-time DBS in 2013:

\$1,019,116

*This average is based upon a total of 70 FTE positions, including 13 part-time and 63 full-time staff.

DBSs Help With a Wide Range of Benefits Issues

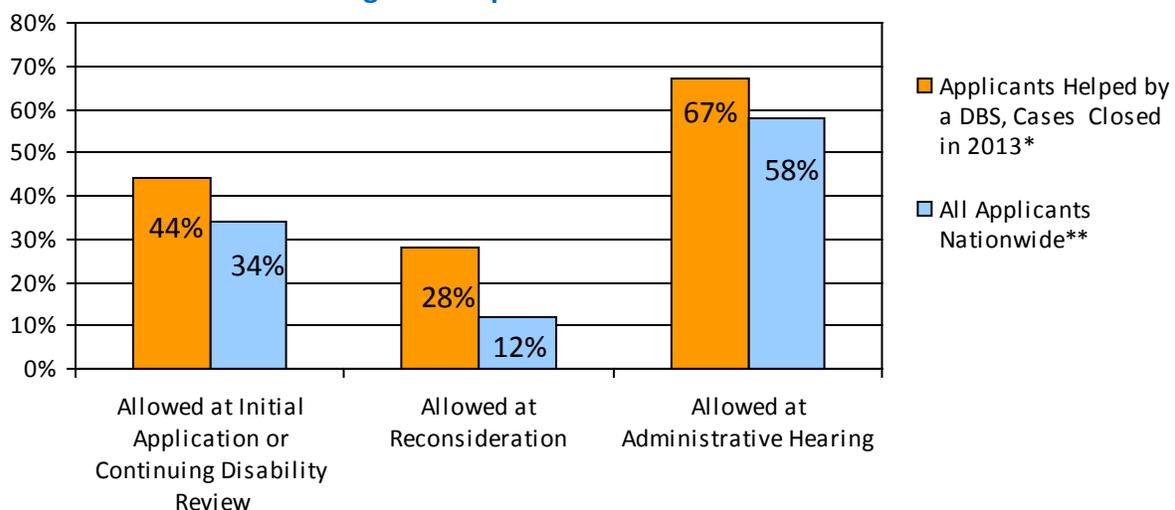
Disability benefit specialists help people to resolve a wide range of benefits issues. A single case may involve multiple interrelated issues. The top ten issues reported for DBS cases closed in 2013 are listed in the chart below.

| Top Ten DBS Case Issues of 2013 | Percent of Cases |
|--|------------------|
| SSI/SSDI Eligibility | 40% |
| Medicare Part D Options/Enrollment | 16% |
| Medicaid Purchase Plan (MAPP) | 13% |
| Medicare Savings Programs (QMB, SLMB, SLMB+) | 7% |
| FoodShare | 7% |
| Medicaid Financial Eligibility | 7% |
| SSI/SSDI Post-Entitlement Issues | 6% |
| Benefit Check-Up | 5% |
| Medicaid Disability Determination | 4% |
| Medicare Advantage Options/Enrollment | 4% |

DBSs 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.

Percentage of People Awarded SSI or SSDI Benefits



* This data excludes cases with 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.

DBSs Serve Record Numbers

A DBS opens a “case” for each issue or set of closely interrelated issues that they assist 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.

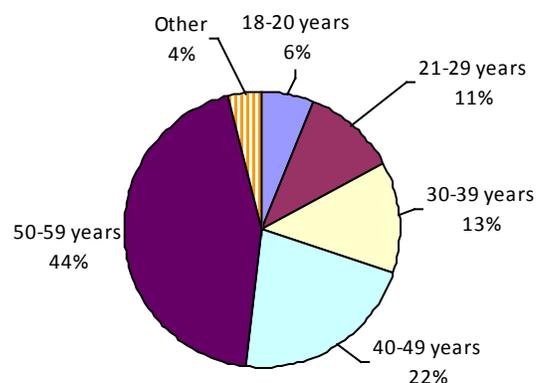
Due to program expansion and word of mouth, the number of people receiving DBS services continues to grow each year. In 2013, a record number of people received help from a DBS.

| DBS Activities in 2013 | | Statewide | Average for One Full-Time DBS* |
|-------------------------------------|------------------------|-----------|--------------------------------|
| Numbers of Cases | Carried Over from 2012 | 4,006 | 57 |
| | Opened in 2013 | 11,728 | 168 |
| | Closed in 2013 | 11,584 | 166 |
| Number of Information-Only Contacts | | 9,302 | 133 |

*These averages are calculated based upon a total of 70 full-time equivalent (FTE) positions.

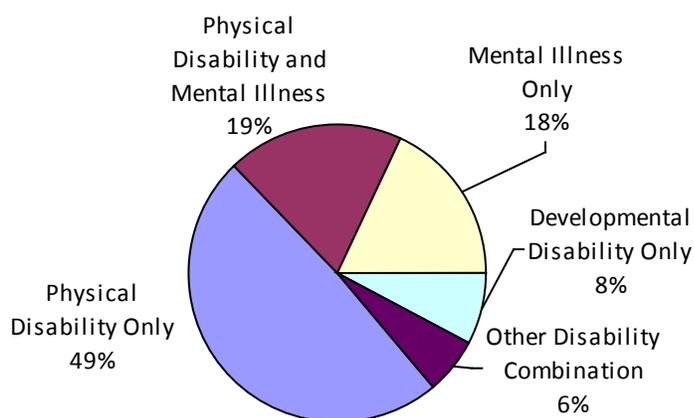
DBSs Reach Diverse Population Sectors

DBSs provide services to people regardless of income-level or disability type. The program serves people aged 18 to 59, including youth 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 Age*

| Customer Income* |
|--|
| Seventy-six percent (76%) of DBS customers had incomes at or below 120% of the Federal Poverty Level (FPL)* |



Customer Disability*

| Customer Living Arrangement* | |
|------------------------------|-----|
| Lives with Others | 67% |
| Lives Alone | 28% |
| Homeless or Shelter | 5% |
| Residential Care | 1% |
| Nursing Home | <1% |

*All DBS customer demographic data are based on people for whom a case was opened in 2013 and exclude people whose demographic status was unknown or unreported.

“It is so helpful to know that that person is there if I’m overwhelmed or struggling with something....”
Benefit Specialist Survey Respondent

DBS Services Receive High Marks in Customer Satisfaction

In May 2013, the Department published the results of a statewide customer survey about benefit specialist services, funded through a grant from the Federal Administration on Aging. Customers offered high praise for the usefulness, expertise and courtesy of Wisconsin benefit specialists. Among customers surveyed, 87% rated their overall experience with a benefit specialist as excellent.

DBSs Receive Extensive Training and Technical Assistance

Disability benefit specialists can be counted on to provide accurate, current information. They receive extensive training and skill-building opportunities, as well as expert technical assistance.

Wisconsin Disability Benefits Network (WDBN) coordinates initial training for newly hired disability benefit specialists, with subject matter expertise provided through a sub-contract with Disability Rights Wisconsin. In 2013, WDBN training was provided to a total of eighteen new hires. The standard training regimen for a new DBS includes 40 hours of online training and four days of in-person training.

Disability Rights Wisconsin provides ongoing training, technical assistance and case oversight to all disability benefit specialists. A staff of eight program attorneys and one managing attorney was employed under this State contract in 2013. Ongoing training topics this year included the health insurance marketplace, BadgerCare Plus, Medicare and Medigap options, Social Security representative payees, ethics and boundaries, continuing disability reviews, letter-writing techniques, psychological evaluation and assessment processes, Wisconsin chronic disease programs and trauma-informed counseling.

Wisconsin Judicare, Inc. provides program attorney services to the disability benefit specialists employed by Great Lakes Inter-Tribal Council, including training on benefits issues unique to tribal members, as well as 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 www.dhs.wisconsin.gov/disabilities/benspecs/program.htm or contact the Bureau of Aging and Disability Resources at (608) 266-2536.



Wisconsin
Department of Health Services

State of Wisconsin
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Division of Long Term Care
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