

## **Guidelines For Handling Elder Benefit Specialists' (EBS) Vacancies September 2013**

**This document is intended to assist local agencies in developing strategies  
for managing short-term vacancies in the EBS position.**

To avoid a break in the delivery of services when an EBS leaves the position, a new EBS should be hired prior to the former EBS' departure, or soon thereafter, whenever feasible.

There may be instances when the EBS' departure is unexpected and a new hire is not in place for a month or more. For this reason, you may want to establish a protocol for how to manage the former EBS' caseload of open cases, and how to handle prospective new cases.

### *Existing cases*

Prior to his or her departure, the EBS should have one or more consultative sessions with the program attorney via telephone, to assess open cases and to receive guidance on their disposition. Where there are deadlines, or a need for letters to be drafted (SSA, insurance company, landlord, etc.), the program attorney may decide to take over the case. In other instances, if appropriate, the attorney may instruct the EBS to send a closing letter to the client.

When the EBS' departure is sudden and there is no time for a consultation with the program attorney, the local director or supervisor should contact the latter to discuss how open cases will be handled.

### *New/Prospective EBS Clients*

Until a new EBS is hired, the local agency may decide to establish a waiting list.

Be aware that individuals who present with notices of Social Security or SSI overpayments, or who have been denied eligibility for Medicaid, or who present with some type of appeal situation, have deadlines by which to respond. These cases could be handled by the Disability Benefit Specialist (DBS) housed in the same agency, or, in a multi-county ADRC, by another EBS, provided their caseload permits it.

When neither the EBS in the multicounty ADRC, nor the DBS are available, local agencies may agree on a reciprocal referral system to an EBS or DBS in a neighboring ADRC or Aging Unit. It is not uncommon for any one agency to provide or to need the assistance of a neighboring agency at some point. Alternately, the local agency director, in consultation with the program attorney, may assist with the EBS caseload.

During a vacancy, lower priority or discretionary EBS services – such as assistance in filling out low-income tax credit forms, should be eliminated.

The agency may establish a triage system where the receptionist or the I&A determines the urgency of the caller’s need for benefit specialist services, similar to the model developed in the “Caseload Management Guidelines for Benefit Specialists.”<sup>1</sup>

Core benefit specialist program services such as Medicare Part D counseling may be referred to the Medigap Helpline (1-800-242-1060). As a courtesy, the local agency may inform the Helpline about this temporary arrangement. Alternately, these calls may be referred directly to Medicare (1-800-633-4227). Questions and problems about Social Security issues can be referred to the SSA toll free number, 1-800-772-1213, or to your local Social Security Administration (SSA).

The agency director may also wish to inform the appropriate regional IM Consortium and the local SSA office about the EBS vacancy, to help reduce referrals for services not temporarily available within the local agency.

Developing a protocol for these types of contingencies will be helpful if the situation arises. Program attorneys are always available to provide input.

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<sup>1</sup> <http://www.dhs.wisconsin.gov/benefit-specialists/ebsdocs/CaseloadMgmtGuidelines.pdf>

