

**GUIDELINES FOR ELDER BENEFIT SPECIALIST (EBS) PROGRAM
TRAININGS
February 2014**

**This document is intended to assist local agencies in managing initial and ongoing
EBS program trainings.**

Initial Trainings

In order to serve clients effectively, EBS must attend an intensive EBS program training shortly after hire. The training lasts three days (see Chapter 9, Elderly Benefit Specialist Program, Manual of Policies, Procedures and Technical Assistance for the Wisconsin Aging Network).

Supervisors should notify the appropriate regional program attorney at the Greater Wisconsin Agency on Aging Resources (GWAAR) of the new hire, and find out the date for the next initial training. Generally, so long as there are new EBS to train, six in-person sessions are offered throughout the year: January, March, May, July, September and November. These trainings are held in Madison.

New EBS in Milwaukee County receive initial training by SeniorLaw attorneys within the first two weeks of hire. New EBS in the other Southeastern counties supervised by Seniorlaw (Washington, Ozaukee, Waukesha, Racine and Kenosha), receive initial training within the first 6-8 weeks. The initial intensive trainings offered by GWAAR in Madison are open to these EBS, as well as to new Tribal EBS.

GWAAR initial trainings for EBS include the following subject areas:

- **Case Handling / Program Procedures and Public Benefits.** This portion of the training is conducted by program attorneys. Topics include:

Overview of the EBS Program; Working with the Program Attorney; Ethical Underpinnings of the Benefit Specialist Program; Benefits Check-Up; Avoiding Malpractice; Wisconsin Medicaid; Long-Term Care Medicaid; Medicare and Private Insurance; FoodShare, Lifeline, WHEAP, Social Security, Social Security Overpayments; Consumer-Fair Debt Collection.

- **Social Assistance Management System (SAMS).** Demographic and statistical information about individuals served by the EBS is collected in SAMS. EBS must receive training in how to key in information in the system. Two hours of introductory training is offered by GWAAR staff.

EBS in Milwaukee County use an alternative database system instead of SAMS, and receive appropriate training from SeniorLaw staff.

- **State Health Insurance Assistance Program (SHIP).** The SHIP director conducts training in SHIP reporting requirements and SHIP performance measures.¹

Prior to attending the SHIP training, the **local agency** SHIP administrator must register the EBS in the SHIP database at this link:

<https://shipnpr.shiptalk.org/UserRegistration.aspx?ReturnUrl=/>.



The EBS should also self-register in the “old” SHIP database at this link:

<https://shiptalk.org/>.



A SHIP Tutorial Webcast is accessible at this link and will be helpful in providing a general overview of SHIP:

<http://dhsmedia.wi.gov/main/Play/842266ad8477440eb03d190eb9f22fd81d?catalog=89e180f3-0b07-44f6-ac96-51bad7d03d8a>.



When attending the initial training, new EBS must bring along the passwords used to log-in to both of the SHIP websites, as they will be required for hands-on practice. The EBS should also bring along a laptop.

Be aware that, in order to streamline some of the duplication that exists between the SAMS and the SHIP reporting requirements, a database application was designed to help EBS streamline SHIP reporting. The database application is called SHIPYard. It is up to the EBS to choose how to key in SHIP related data. SHIP Client Contact data can be entered either through SHIPTalk.npr or through SHIPYard in SAMS. Public and Media Activity data can only be entered through SHIPTalk.npr.

SHIPYard training is available in the form of several videos accessible in the GWAAR website. To find them, simply Google: GWAAR SHIPYard.

SeniorLaw EBS in Milwaukee County report SHIP data in their own proprietary system, and receive training from SeniorLaw.

- **Online Modules Orientation.** Staff from Employment Resources Inc., (ERI) conduct a session to orient new EBS in navigating the large on-line library of benefit specialist resources developed by ERI and by program attorneys.

The library contains some basic online modules, namely: “Orientation to EBS Online Training,” “Benefits Counseling,” “Social Security,” “Medicaid,” “Medicare,” “Other Public Benefits,” and “Consumer Law.”

¹ Counties that received MIPPA funding should also arrange a MIPPA related training through GWAAR's MIPPA Statewide Coordinators.

If at all possible, these basic modules should be viewed prior to attending the initial in-person EBS training, to gain some basic knowledge about the topics. The modules can be accessed through log-in information obtainable through program attorneys.

In addition to the initial in-person intensive training, there are additional resources for EBS in the form of Webcasts, **available on demand through the Department of Health Services Archives**. An updated list of these webcasts is distributed during the initial training session. The webcasts can be viewed over a period of weeks or months, **with one exception**: the webcast on “Monetary Impact of Benefit Specialist Services,” should be viewed early on, to ensure the earliest possible capture of the EBS ‘monetary’ value of services.

Ongoing Trainings

Rules and regulations for public programs may change from time to time. Financial eligibility amounts change annually. To keep up with program updates, and to provide accurate information, all EBS must receive trainings updates. Failure to do so puts program attorneys at risk of liability. Ongoing trainings are mandatory. Any absences must be excused by the local agency director and by the program attorney.

Yearly, program attorneys offer a total of six ongoing trainings. They include program updates, as well as in-depth training on specific timely topics of interest. Ongoing trainings may also include invited speakers. GWAAR attorneys conduct four of these day-long trainings regionally. Regional in-person trainings occur in April, June (in conjunction with the Wisconsin Association of Benefit Specialists Annual Conference), August and October. The remaining two are in the form of Webcasts and are offered in December and February.

In addition, the SHIP sponsors a webcast for all SHIP Counselors in the fall of each year, in preparation of the Annual Enrollment Period.

As a component of SHIP, CMS provides ongoing webinar trainings on specific topics throughout the year. To receive notification of these trainings, SHIP counselors should subscribe to the CMS National Training Program e-mail distribution list. CMS also conducts an in-person yearly training each summer in Chicago. Materials cover basic and advanced Medicare topics. Typically, the Department of Health Services learns of this opportunity in April and distributes relevant information to all SHIP Counselors. SHIP funding can be used to defray the costs associated with this training.



Wisconsin
Department of Health Services

P-00627 (03/2014)