



Disability Benefit Specialist Program

2017 Summary Report

A **disability benefit specialist (DBS)** serves people with disabilities who are 17 years and 6 months to 59 years old. These professionals help clients access Social Security, Medicaid, Medicare, and other public and private benefits. A DBS explains benefit eligibility criteria, appeal options, and deadlines. When appropriate, this position assists with eligibility verification and fair hearings.

DBS services are available statewide.

All aging and disability resource centers across Wisconsin offer DBS services.

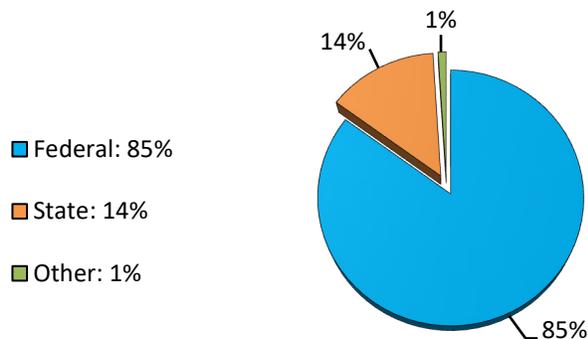
The Great Lakes Inter-Tribal Council employs three DBS staff to serve **tribal members** who live on or near a Wisconsin reservation.

The Department of Health Services, Office for the Deaf and Hard of Hearing, employs a DBS to serve **individuals who use American Sign Language**.

DBS services make a positive impact.

DBS services help people with disabilities access insurance, food, shelter, and medical care. In 2017, DBSs helped individuals with disabilities acquire over **\$81 million** worth of services, which helped to stabilize household budgets and lessen the reliance on local crisis and emergency services. Federal funds accounted for a majority of the benefits provided, while state and other funds, such as private donations, made up the remainder.

2017 Estimated Monetary Impact



Estimated monetary impact of all DBS services in 2017:

\$81,676,000

Estimated monetary impact* per DBS in 2017:

\$1,008,345

*This average is based on a total of 81 full-time equivalent (FTE) positions.



DBSs help with a wide range of benefit issues.

A client’s case may involve multiple interrelated issues. For example, a single case could involve Medicaid, Medicare, and FoodShare eligibility. For cases closed in 2017, the top 10 case issues are listed below.

| Top 10 DBS Case Issues of 2017 | Percent of 2017 Cases |
|--|-----------------------|
| Assistance with Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) Eligibility | 41.6% |
| Medicaid Purchase Plan (MAPP) | 15.5% |
| Medicare Part D Options and Enrollment | 14.1% |
| Medicare Savings Programs | 9.2% |
| SSI and SSDI Post-Entitlement Issues | 8.3% |
| FoodShare | 7.9% |
| Benefit Check-Up | 6.8% |
| BadgerCare Plus | 5.5% |
| Medicaid Financial Eligibility | 4.5% |
| Medicare Eligibility | 4.5% |

DBSs maintain a high caseload.

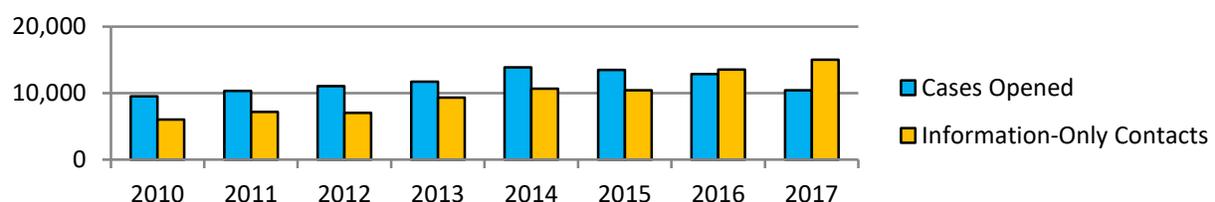
A DBS opens a client “case” for each issue or set of interrelated issues that he or she helps to resolve. A case may remain open for one day or several months, depending on the nature of a client’s issue(s). Client issues that require less than 30 minutes to resolve are recorded as “information-only” contacts.

| DBS Activities in 2017 | | Statewide | Average per Full-Time DBS* |
|--|------------------------|-----------|----------------------------|
| Number of Cases | Carried over from 2016 | 4,207 | 52 |
| | Opened in 2017 | 12,548 | 155 |
| | Closed in 2017 | 12,676 | 156 |
| Number of Information-Only Contacts | | 15,011 | 185 |

*These averages are calculated based on a total of 81 full-time equivalent (FTE) positions.

DBS services are available statewide.

The number of people receiving DBS services has grown significantly since the program’s inception in 2007. The data below demonstrate the total services provided over the past several years. While the number of client cases has decreased over the past year, the number of information-only contacts continues to rise. This change may be due in part to shifting client needs and growing DBS expertise.



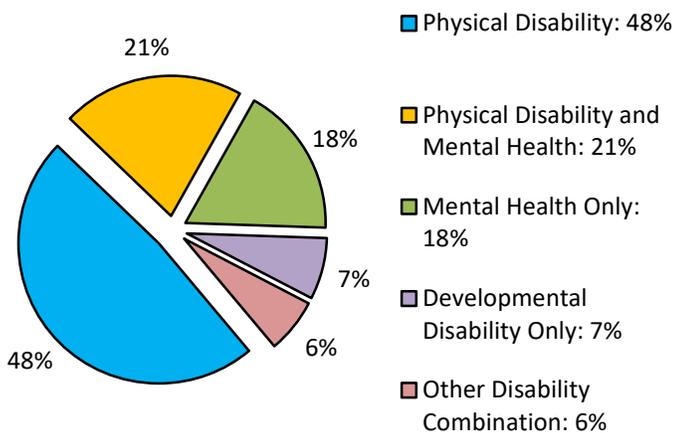
DBSs reach diverse populations.

DBSs serve individuals regardless of income or disability type. DBSs assist youth who are at least 17 years and 6 months old, who are transitioning to adult benefits. Additionally, DBSs serve adults who may be seeking disability benefits for the first time, weighing their Medicare options, or facing a change in their benefits. Elder benefit specialists provide similar services to adults aged 60 and over.

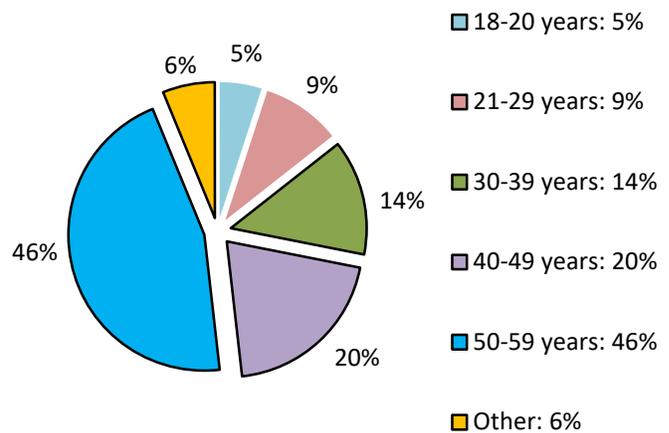
Client Income*

Over 75% of DBS clients had incomes at or below 120% of the federal poverty level (FPL).

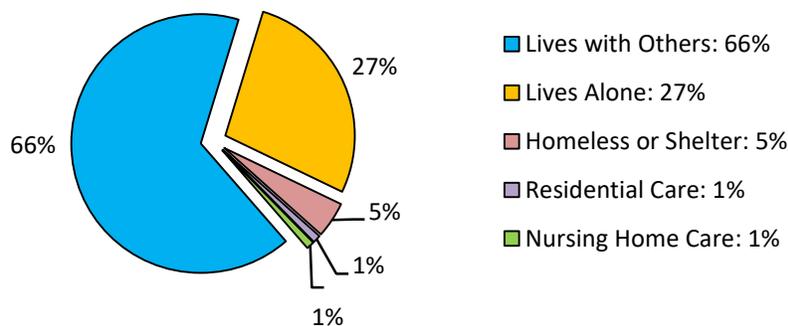
Disability Types of Individuals Served*



Client Age*



Client Living Arrangement*



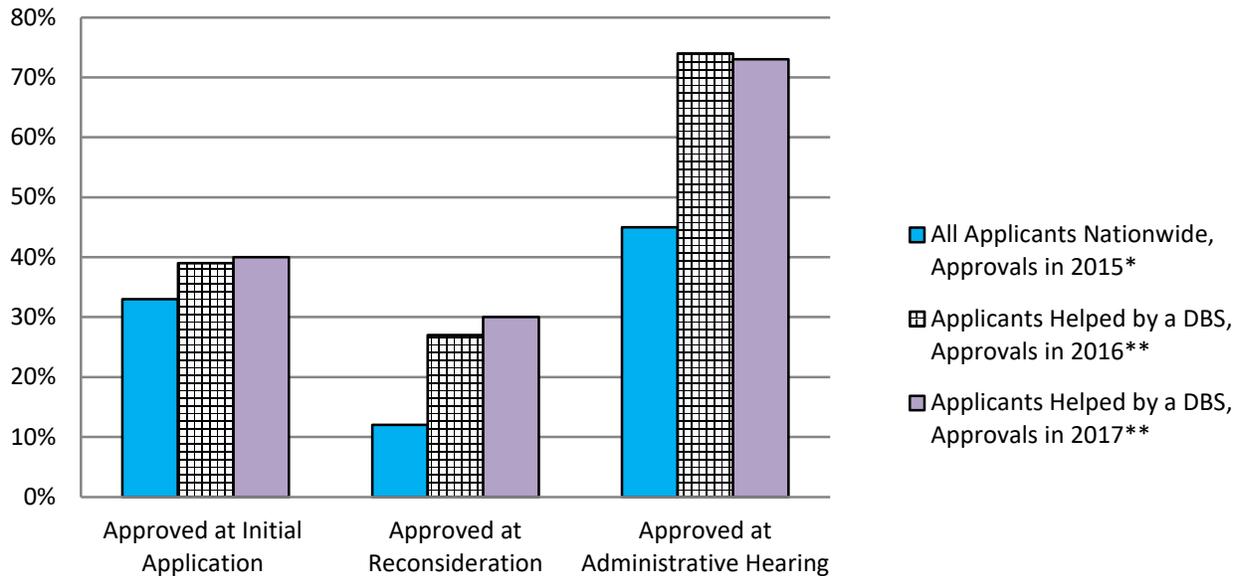
*All 2017 DBS client data are based on clients for whom a case was opened. The data exclude people whose demographic status was unknown or unreported.



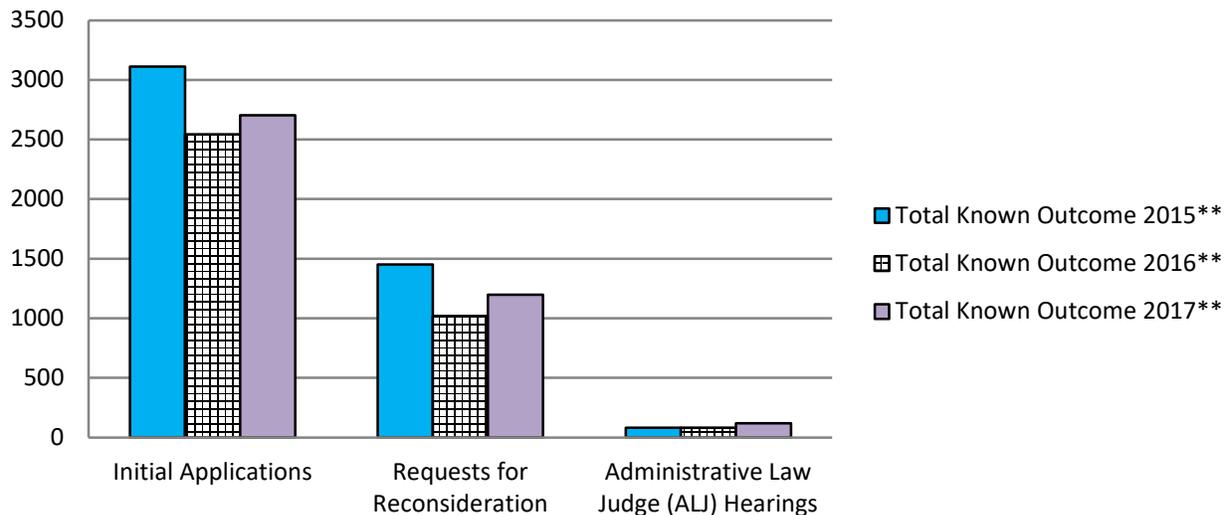
DBSs play a key role in disability determination cases.

DBSs help people access needed disability benefits, including SSDI and SSI. As illustrated below, Wisconsin's program data indicate that people who obtain DBS assistance may be more likely to receive a favorable decision. The chart below compares approval rates. An approval is when a person is granted Social Security benefits.

DBS Approval Rates Compared to National Approval Rates



DBS Assistance with SSA Benefit Applications, Reconsiderations, and Hearings



* Social Security Administration (SSA) Fiscal Year (FY) 2017 Budget Justification, FY 2015 Disability Workload, p. 169, available at <https://www.ssa.gov/budget/FY17Files/2017FCJ.pdf>.

** The data include SSA benefit matters at various stages, including initial application, reconsideration, and administrative law judge hearings. The data exclude cases with outcomes listed as unknown, pending, or withdrawn prior to the issuance of a decision. Reasons for a pending or unknown outcome may include the provision of information-only services, client withdrawal or lack of contact, or referral to a private attorney.



DBSs receive extensive training and technical assistance.

DBSs are trusted to provide accurate information. Accordingly, DBSs receive extensive training and opportunities for skill building, and they 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 subcontract with Disability Rights Wisconsin. In 2017, initial training was provided to 16 new DBSs; this training was also available to new DBS assistants and supervisors. The standard training program for a new DBS includes 40 hours of online training, four days of in-person training, and job shadowing.

Disability Rights Wisconsin provides ongoing training, technical assistance, and case oversight to all DBSs. A staff of eight program attorneys, one training coordinator, and one managing attorney are employed under contract with the Department of Health Services. Examples of 2017 training topics are listed below.

- DBS confidentiality standards
- Disability determinations
- Benefit appeals
- SSI financial eligibility
- Debt collection
- Health insurance topics
- Mental health listing criteria
- Housing accommodation requests
- Case strategy development
- SSA overpayments

Wisconsin Judicare, Inc. provides program attorney services to DBSs who are employed by the 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, visit the Wisconsin Department of Health Services [benefit specialists website](#), or contact the Bureau of Aging and Disability Resources at 608-266-2536.

