

Disability and Elder Benefit Specialist (DBS and EBS) Time Reporting Quick Guide

This technical assistance document supplements the guidance provided in [ADRC Time and Task Reporting](#). It provides a crosswalk between the benefit specialist call topics in the WellSky (SAMS) reporting system and the time reporting categories that are used in the daily Time and Task (T&T) worksheets.

WellSky (SAMS) Benefit Specialist Call Topic	WellSky (SAMS) Call Topic Description	Time Reporting Category
1-A05 BadgerCare Plus	BadgerCare Plus eligibility or coverage, including appeals	1 or 4
1-A10 Dental Care, Free/Reduced Cost	Eligibility or coverage for free or reduced cost dental care through a non-Medicaid program such as Donated Dental Services or a school of dentistry	2b
1-A15 Family Planning Services Waiver	Family Planning Services Waiver eligibility or coverage	1
1-A20 Health Care, Free/Reduced Cost	Eligibility for Charity Care, Wisconsin Chronic Disease Programs, or other non-Medicaid programs that offer health care to uninsured people for free or at a reduced cost	2b
1-A21 Prescriptions, Free/Reduced Cost	Eligibility for free or reduced cost prescription medications through a non-Medicaid program such as pharmaceutical manufacturer assistance program	2b
1-A25 Health Insurance, Private/Marketplace	Eligibility or coverage for health care services through a private health insurance plan offered through an employer, the Marketplace, or an insurer outside of the Marketplace	5
1-A30 Indian Health Services	Eligibility or coverage for healthcare through Indian Health Services	5
1-A35 Medicaid, EBD Card Services	Eligibility or coverage for primary and acute healthcare services through Medicaid for the Elderly, Blind, and Disabled, including SSI Medicaid, Categorically Needy Medicaid, the Medicaid Deductible Program, Medicaid Purchase Plan (MAPP), and the Wisconsin Well Woman program; including appeals	1 or 4

WellSky (SAMS) Benefit Specialist Call Topic	WellSky (SAMS) Call Topic Description	Time Reporting Category
1-A40 Medicaid, Home/Community Based LTC	Eligibility or coverage for long-term care services through Family Care, Family Care Partnership, PACE, IRIS, or another home and community-based waiver program; including appeals	1 or 4
1-A45 Medicaid, Institutional Long-Term Care	Issues related to Medicaid coverage for long-term care in a skilled nursing facility or another institutional setting, including but not limited to eligibility, spousal impoverishment protections, and divestment issues, including appeals	1 or 4
1-A50 Medicaid, Liens/Estate Recovery	Questions or concerns about Medicaid-related liens or estate recovery	1
1-A60 Medicare Options/Enrollment	Assistance related to enrollment in Medicare and related programs, including Parts A and B, Medicare Advantage, Part D, Cost, and supplement policies Assistance related to enrollment in Medicare Advantage Dual Special Needs Plans (D-SNP) and Part D plans for customers who are dually eligible for full-benefit Medicaid and/or a Medicare Savings Program	5 1
1-A61 Medicare Coverage, Items/Services	Issues related to Medicare coverage of items and services, including coverage disputes and appeals under all parts of Medicare	5
1-A62 Medicare Savings Programs/Part D LIS	Issues related to Medicare Savings Programs and Part D Extra Help or Low-Income Subsidy (LIS), including applications, renewals, and coverage, including appeals	1
1-A63 Long-Term Care Insurance	Long-term care insurance policy enrollment and coverage issues	5
1-A70 SeniorCare Level—All Levels	Eligibility and coverage for prescriptions through Wisconsin SeniorCare at any coverage level, including appeals	1
1-A75 Veterans'/Military Health Benefits	Health benefits for veterans or active military personnel including but not limited to Veterans Administration (VA) and TriCare programs	5
1-B05 Disability Insurance, Private/Group	Eligibility or coverage for disability benefits through a private or employer group insurance policy	5

WellSky (SAMS) Benefit Specialist Call Topic	WellSky (SAMS) Call Topic Description	Time Reporting Category
1-B10 FoodShare	Eligibility for Wisconsin FoodShare (SNAP)	5
1-B15 Pension	Eligibility for private pension benefits, including employment and military/veterans' pensions	5
1-B20 SSDI/SSI-Disability	Issues related to Social Security Disability Insurance and/or Supplemental Security Income (SSI) for people under the age of 65 with a disability, including appeals	1 if SSI 5 if SSDI-only
1-B20 SSI, Age 65+	Issues related to Supplemental Security Income (SSI) for people aged 65 or older, including eligibility and overpayments, including appeals	1
1-B25 Social Security Retirement (OAI)	Issues related to Social Security retirement benefits, including eligibility, enrollment, and overpayments	5
1-B35 SSI Caretaker Supplement (CTS)	Issues related to State SSI Caretaker Supplement eligibility and overpayments	1
1-B40 SSI E (Exceptional Expense)	Issues related to State SSI Exceptional Expense (SSI-E) benefit eligibility and overpayments	1
1-B50 Unemployment Compensation	Issues related to Unemployment Compensation	5
1-B65 Homestead/Low Income Tax Assistance	Questions and concerns related to low-income tax credits, including but not limited to homestead and earned income tax credits.	5
1-C05 Dementia/Caregiver Programs	Programs that support people with dementia and/or caregivers. Includes memory screens, dementia care specialist services, and National/Alzheimer's Family Caregiver Support Programs.	5
1-C10 Nutrition/Meals/Food Assistance	Issues related to programs that provide food and nutrition, such as farmer's market vouchers, food pantries, congregate meal sites, and home-delivered meals	2 or 5
1-C15 Transportation	Information about and referral to transportation programs and services	2
1-D05 Subsidized Housing	Issues related to programs that provide subsidized rental housing for low-income households such as Section 8, WHEDA, and rural housing assistance, including eligibility and availability	5

WellSky (SAMS) Benefit Specialist Call Topic	WellSky (SAMS) Call Topic Description	Time Reporting Category
1-D25 Housing Repair/Improvement Assistance	Issues related to programs that provide financial assistance to homeowners to repair or improve their property	5
1-D30 Private Landlord/Tenant	Issues related to tenant rights, such as security deposit refunds and eviction	5
1-D35 Property Tax Assistance	Issues related to programs that provide financial assistance to homeowners to cover the costs of property taxes	5
1-D40 Rent/Mortgage Assistance	Issues related to programs that provide financial assistance to homeowners to cover the costs of property taxes	5
1-D45 Utilities (Heat, Phone, etc.)	Issues related to heating, energy, or telephone costs, including financial assistance through programs such as the Wisconsin Heat and Energy Assistance Program (WHEAP) and the Lifeline and SafeLink telephone subsidies	5
1-D55 Weatherization Assistance	Issues related to programs that provide financial assistance with home weatherization	5
1-E10 Consumer Debt	Issues related to consumer debt, such as fair debt collection practices and negotiation with creditors	5
1-E15 Consumer Fraud	Issues related to consumer fraud	5
1-E20 Financial and Credit Counseling	Issues related to financial and credit counseling	5
1-F05 Advance & Surrogate Financial Decisions	Issues related to Powers of Attorney for Finances, Pooled and Community Trusts, or Conservatorship	5
1-F10 Advance Medical Directives	Issues related to Powers of Attorney for Healthcare and Living Wills	5
1-F15 Guardianship	Issues related to guardianship	5
1-F25 Wills and Estate Planning	Issues related to wills and estate planning	5
1-G05 Discrimination/Civil Rights	Issues related to discrimination against a protected class (including but not limited to age and disability) and civil rights	5
1-G15 Elder Abuse/Adult Protective Services	Issues related to elder abuse and adult protective services	5
1-G20 Long-Term Care Ombudsman	Issues requiring a referral to the long-term care ombudsmen programs, such as concerns about quality of care and resident rights in a nursing home setting	5

WellSky (SAMS) Benefit Specialist Call Topic	WellSky (SAMS) Call Topic Description	Time Reporting Category
1-H05 Benefit Check Up	Provision of a comprehensive eligibility screening for all available public financial assistance programs	1 or 5 (Divide your time according to time spent talking about Medicaid and related programs vs. other non-Medicaid benefits).
1-H10 Employment Programs	Information about and referral to programs that aid find or retain employment, including vocational rehabilitation services, work incentives benefits counseling, senior employment, and foster grandparents	5
1-H30 Other, Inside Program Scope	Any topic within benefit specialist program scope that is not otherwise listed	2 or 5
1-H40 Other, Outside Program Scope	Any topic outside benefit specialist program scope that is not otherwise listed	2 or 5
1-H50 COVID-19—Not Otherwise Specified	Issues related to COVID-19	2 or Other Program Column