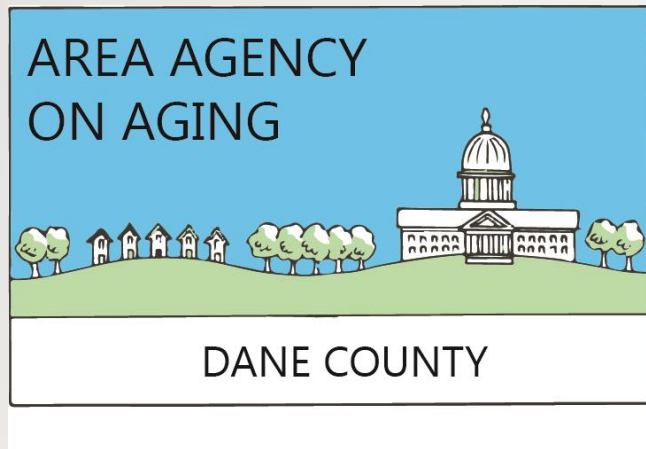


# Elder Benefit Specialist (EBS) Program Annual Update

*July 2022*



# EBS Program Overview



- Purpose - To provide broad access to public benefits and legal rights to older adults throughout the state.
- Free legal advocacy services provided to Dane County residents age 60+
- Funding – Federal / State / County
- State Health Insurance Assistance Program (SHIP) counselors
- EBSs receive in-depth ongoing training in the following general program areas: Medicare, Medicaid, Social Security, Supplemental Security Income (SSI), FoodShare, Housing, Consumer Debt, Other Health Insurance

# EBS Program Overview



- EBS staff engage in a wide variety of services:
  - Providing information on program eligibility criteria
  - Assisting with applications for public benefits
  - Conducting initial reviews of agency decisions
  - Appealing application denials, terminations, or reductions in benefits
  - Advocating in housing-related disputes (not locating new housing or providing financial assistance)
  - Providing Welcome to Medicare presentations to the community

# EBS Referral Process



- Initiated by Information & Assistance (I&A) Specialists at the Aging and Disability Resource Center (ADRC)
- The individual who needs help addressing a problem or issue or their legal representative (Power of Attorney for Finance or Guardian of Estate) should contact the ADRC to discuss their situation.
- The I&A Specialist will inquire about the situation to determine whether they can assist or if an EBS referral is appropriate.
- Referrals prioritized based on type of issue(s), deadline(s), etc.



# High Priority Issues



- Consumer/legal representative contacted by EBS within approx. 48 hours
- Examples:
  - Denial or reduction of benefits w/ approaching deadline (<60 days), or past deadline
  - Eviction notice or pressing housing issue
  - Social Security or SSI overpayment (60 day appeal window)
  - Medicaid appeal (45 day appeal window; no late appeals)
  - Pharmacy/drug coverage issue - client has immediate need for medication
  - Other

# Normal Priority Issues



- Referral placed on waitlist and consumer/legal representative contacted by EBS within approx. 30 days. Client receives waitlist letter in the mail.
- Examples:
  - Original Medicare appeal (120 day appeal window)
  - Original Medicare or Medicare Advantage Plan billing issue
  - Private insurance appeal or billing problem
  - FoodShare appeal (90 day deadline)
  - *Initial* applications for Social Security Disability or SSI disability benefits
  - Pharmacy/drug coverage issue – no immediate need for medication
  - Other

# Referrals EBS Cannot Accept

- Comparison of Medicare supplement plans – *refer to Medigap Helpline and/or recommend contacting private insurance agents*
- Health Insurance Marketplace plan enrollment – *refer to Covering Wisconsin or [healthcare.gov](https://healthcare.gov)*
- SSDI and SSI appeals, *in most cases* – *refer to private attorneys*
- Medicaid and Estate Planning – *refer to private attorneys*
- Other fee-generating cases – *refer to private attorneys*
- The EBS Program cannot recommend specific attorneys.



sorry.

# 2021 EBS Program Statistics

- AAA EBS Staff: Leilani Amundson (2016), Tiffany Scully (2013), Kenton Zink (2020)
  - EBS Cases Opened 447
  - EBS Clients (unduplicated) 173
  - EBS Legal Services Hours 1,849
  - Monetary Impact \$509,292.00 (approx.)



# 2021 EBS Program Statistics

- Client Age:

- 60-69 56.1%
- 70-79 27.7%
- 80-89 15.0%
- 90-99 1.2%

- Client Race:

White, non-Hispanic	75.7%
Black/African American	13.9%
Asian	6.4%
White-Hispanic	2.9%
Other	0.6%
American Indian/Native Alaskan	0.0%



# 2021 EBS Program Statistics

- Closed cases by topic group

1. Health Insurance Benefits	56.3%
2. Income Benefits	20.1%
3. Other	9.6%
4. Housing and Utilities	8.7%
5. Consumer Issues	4.1%

Questions?

