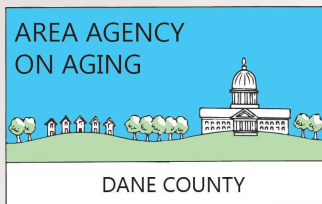


Elder Benefit Specialist (EBS) Program

Area Agency on Aging (AAA) of Dane County

July 21, 2025



Dane County EBS Team

- *Leilani Amundson (hired 2016)*
- *Tiffany Scully (hired 2013)*
- *Kenton Zink (hired 2020)*



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/ voluntary donations
- 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:*
- Conducting initial reviews of agency decisions
- Appealing denials, terminations, or reductions in benefits
- Providing information on program eligibility criteria
- Assisting with applications for public 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*
- 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. EBSs cannot make cold calls – consumer needs to actively request assistance.
- The I&A Specialist will inquire about the situation to determine whether they can assist or if an EBS referral is appropriate.
- Referrals are prioritized based on type of issue(s), deadline(s), etc.

High Priority Referrals



- *Consumer/legal representative contacted by EBS within approx. 48 hours*
- Examples of issues:
 - Denial or reduction of benefits w/ approaching deadline (<60 days), or past deadline
 - Medicare Advantage appeal (60-day appeal window)
 - Eviction notice or pressing housing issue that cannot be addressed by another community resource (Tenant Resource Center, UW Law School clinic, etc.)
 - Social Security or SSI overpayment (60-day appeal window)
 - Medicaid appeal (45-day appeal window)
 - Pharmacy/drug coverage issue - client has immediate need for medication
 - Other

Normal Priority Referrals



- *Referral placed on waitlist and consumer/legal representative contacted by EBS within approx. 30 days. Client receives waitlist letter in the mail.*
- **Examples of issues:**
 - 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 appeal window)
 - *Initial applications for Social Security Disability or SSI disability benefits, if not working with a Focal Point (senior center) case manager.*
 - Pharmacy/drug coverage issue – no immediate need for medication
 - Debt collection issues
 - Other

Issues Outside the Scope of the EBS Program



- 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*
- 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 – *consumers are offered a brochure from the GWAAR Elder Law and Advocacy Center with resources on how to choose an attorney.*
- The EBS Program is unable to assist consumers with locating new housing

EBS Program Statistics: *Jan-Oct 2024*

- EBS Clients (unduplicated) 189
- EBS Cases Opened 427
- EBS Legal Services Hours 1,729
- Monetary Impact \$1,139,633 (approx.)



EBS Program Statistics: *Jan-Oct 2024*

• Client Age:

- 60-69 67%
- 70-79 22.5%
- 80-89 8.8%
- 90-99 1.7%



Client Race:

White, non-Hispanic	71.5%
Black/African American	19.4%
Asian	5.1%
White-Hispanic	3.7%
American Indian/Native Alaskan	0%
Native Hawaiian/Pacific Islander	0%
Other	0%

EBS Program Statistics: *Jan-Oct 2024*

- Closed cases by topic group:

1. Health Insurance Benefits	41.4%
2. Income Benefits	39.5%
3. Other	13.4%
4. Housing and Utilities	3.0%
5. Consumer Issues	1.9%



2024 Outreach Events



- Annual Retirement Workshop – Dane County Employees
“Dane County Retiree Health Insurance Coordination with Medicare”
- UW Madison School of Social Work Masters Program, Aging Field Unit
“Benefit Programs for Older Adults”
- Disability & Aging Services Day at the Henry Vilas Zoo
Overview of EBS Program services
- MIPPA Outreach at Colonial View Apartments in Sun Prairie
“Medicare Open Enrollment Period”

“Welcome to Medicare” Seminars for Dane County Residents age 60+



All dates are on Saturdays, 9–11:30 am

January 18, 2025 Virtual
Email AAA@danecounty.gov to
register by 1/10/25

March 15, 2025 In-Person
Fitchburg Senior Center,
5510 Lacy Rd, Fitchburg
Email AAA@danecounty.gov to
register by 3/7/25

May 17, 2025 Virtual
Email AAA@danecounty.gov to
register by 5/9/25

July 26, 2025 In-Person
Middleton Senior Center, 7448
Hubbard Ave, Middleton Email
AAA@danecounty.gov to register by
7/18/25

September 13, 2025 Virtual
Email AAA@danecounty.gov
to register by 9/5/24

November 15, 2025 In-Person
UW Extension
5201 Fen Oak Dr, Madison
Email AAA@danecounty.gov to
register by 11/7/25

Questions

