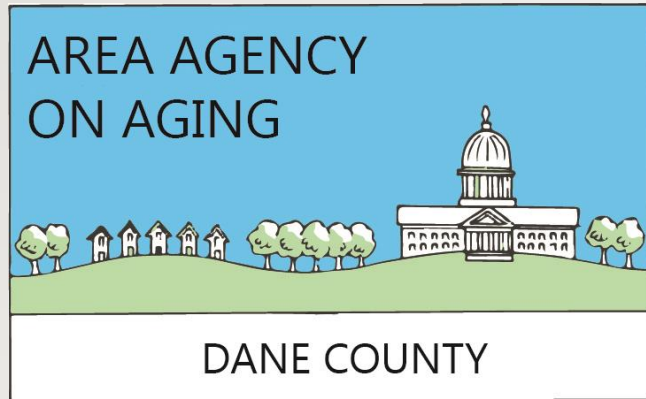


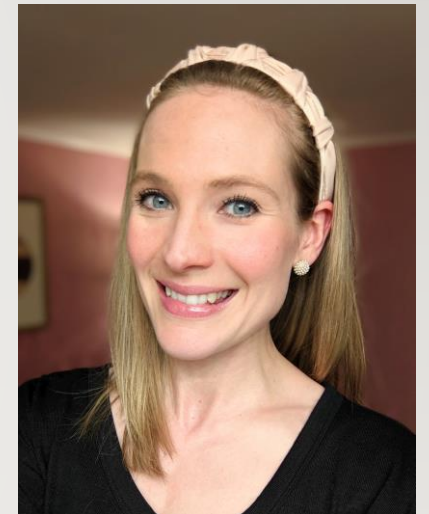
# AAA Elder Benefit Specialist (EBS) Program Update

*May 1, 2023*



# 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
- 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 application 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 (ADRC): 608-240-7400
- 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. EBS 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 (Eviction Defense Project, Legal Action of WI, etc.)
  - 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 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 deadline)
  - *Initial* applications for Social Security Disability or SSI disability benefits, if the consumer is not working with another community provider who can assist with this process.
  - Medicaid Disability Application (MADA)
  - Pharmacy/drug coverage issue – no immediate need for medication
  - Debt collection issue
  - 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](http://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 – ‘How to Choose An Attorney.’*
- The EBS Program is unable to assist consumers with locating new housing



# 2022 EBS Program Statistics

- EBS Clients (unduplicated) 188
- EBS Cases Opened 459
- EBS Legal Services Hours 1,847
- Monetary Impact \$430,774.00 (approx.)



# 2022 EBS Program Statistics

- Client Age:

- 60-69 52.7%
- 70-79 31.4%
- 80-89 11.2%
- 90-99 3.7%

- Client Race:

White, non-Hispanic	79.3%
Black/African American	11.7%
Asian	4.3%
White-Hispanic	3.2%
Native Hawaiian/other Pacific Islander	0.5%
Missing/unknown	1.1%



# 2022 EBS Program Statistics

- Closed cases by topic group:

- |                              |       |
|------------------------------|-------|
| 1. Health Insurance Benefits | 47.5% |
| 2. Other                     | 19.6% |
| 3. Income Benefits           | 19.3% |
| 4. Housing and Utilities     | 9.3%  |
| 5. Consumer Issues           | 3.0%  |





# Client Testimonials



- “I could NOT speak more highly of Leilani Amundson. Leilani listened to my situation with kindness and compassion. She was AMAZING!”
- “The service and kindness we received from Kenton were exceptional.”
- “She [Tiffany] helped us navigate multiple benefit systems, fix problems and understand our needs!”
- “Leilani helped me make a decision I felt overwhelmed with and resolved my situation more easily than I was able to.”
- “I could not be more grateful for Leilani’s help and assistance with our family’s situation. I will definitely recommend this program to anyone who will listen! Thank you for making this program available!”
- “Kenton was excellent, could not have done it without him, much thanks!!!”



# Client Testimonials



- “What an amazing service! Tiffany Scully (+ others) helped me on short notice and were able to get my appeal submitted on time. Ms. Scully followed up with me regularly – was 100% helpful throughout the process.”
- “I couldn’t be more pleased with the services I received from Elder Benefit Specialist Kenton Zink.”
- “Tiffany’s patience with me and dedication to resolving the (ridiculous) charges I was being endlessly billed for was remarkable. I was astounded at how skilled she was at summarizing what we were told and what we wanted from the person we were currently speaking with. I can tell you that I would have given up and figured out a way to pay these bills without Tiffany assuring me that I, indeed, did not owe this money. Her commitment to seeing it resolved was extraordinary. Tiffany is a total pro. And aside from her professional assistance, her kindness and compassion made asking for help very easy.”

# 2023 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”*
- Annual Training for Dane County Focal Point Case Managers  
*“Medicare Refresher”*
- Latino Health Council Meeting
- Behavioral Health Resource Center (BHRC) – Dane County

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



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

**January 14, 2023** Virtual Seminar  
Email [AAA@countyofdane.com](mailto:AAA@countyofdane.com)  
to register by 1/6/23

**March 18, 2023** In-Person  
Fitchburg Senior Center  
5510 Lacy Rd, Fitchburg, WI  
Email [AAA@countyofdane.com](mailto:AAA@countyofdane.com)  
to register by 3/10/23

**May 13, 2023** Virtual Seminar  
Email [AAA@countyofdane.com](mailto:AAA@countyofdane.com)  
to register by 5/5/23

**July 15, 2023** In-Person  
DeForest Area Senior Center  
505 N Main St, DeForest, WI  
Email [AAA@countyofdane.com](mailto:AAA@countyofdane.com)  
to register by 7/7/23

**September 16, 2023** Virtual Seminar  
Email [AAA@countyofdane.com](mailto:AAA@countyofdane.com)  
to register by 9/8/23

**November 11, 2023** In-person, Location TBD  
Email [AAA@countyofdane.com](mailto:AAA@countyofdane.com)  
to register by 11/3/23



# Questions

