# Checklist for Onboarding Newly Hired Elder Benefit Specialists (EBS)

Congratulations on your new position of elder benefit specialist! Benefit specialists make an incredible impact on individuals’ lives and create systemic change. Thank you for dedicating your skills to advancing equity and independence for older adults.

This checklist is designed to help onboard new elder benefit specialists (EBSs). Supervisors may edit this template to include local onboarding steps as well. Please keep this checklist handy in your first year as an EBS.

If listed emails are outdated, check the [Office for Resource Center Development](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) and [EBS SharePoint](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Directory.aspx) directories for current contact information.

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Things to do on your first day

| **What** | **Where or how** | **Who can help** |
| --- | --- | --- |
| Work with your on-site supervisor to obtain access to required Department of Health Services (DHS) systems. | Have your on-site supervisor **complete the** [**ADRC/Aging/Tribal User Systems Access Request (F-02000)**](https://www.dhs.wisconsin.gov/library/f-02000.htm) to request access to:   * See the [form instructions](https://www.dhs.wisconsin.gov/forms/f02000a.pdf) for a list of recommended systems   [Create a WILMS ID](https://register.wisconsin.gov/AccountManagement/default.aspx) for SharePoint access and add it to section 4 of  F-02000).  Ask your on-site supervisor whether you need access to any other systems.  **Read and sign the** [**Systems User Agreement (F-00044**](https://www.dhs.wisconsin.gov/forms/f0/f00044.docx)**)**.  Have your on-site supervisor **email the completed F-02000 and F-00044 forms** to the [DHS BADR Tech systems support team](mailto:DHSBADRtech@dhs.wisconsin.gov) (copy the [EBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm)).  After granting access, the [DHS BADR Tech systems support team](mailto:DHSBADRtech@dhs.wisconsin.gov) will send an email with your username and a separate email with your temporary password for the WellSky database, if applicable.  You will receive an email from the [EBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) when your access to the [EBS SharePoint](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Home.aspx) and [ADRC/Aging SharePoint](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Home.aspx) sites has been granted.  You will receive an email from the WellSky Training Specialist, [Doug Holmes](mailto:douglas.holmes@dhs.wisconsin.gov), offering support as you learn how to use the WellSky database. | * Your on-site supervisor * DHS BADR Tech systems support team: [dhsbadrtech @dhs.wisconsin.gov](mailto:dhsbadrtech@dhs.wisconsin.gov) * EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Request access to the learning management system. | [**Request access**](https://eri-wi.org/adrc-enroll/) **to the** [**Litmos learning management system (LMS)**](https://eri.litmos.com/account/login) as an elder benefit specialist (EBS) to access online training for benefit programs**.**  Within three business days, you will receive an email with your login information. | LMS Helpdesk: [help@eri-wi.org](mailto:help@eri-wi.org) |
| Request access to the  SHIP TA Center. | **Go to the national** [**State Health Insurance Assistance Program (SHIP) Technical Assistance (TA) Center**](https://portal.shiptacenter.org/) **and click the green button to “Submit a request to be a registered user”** to access Medicare resources and training.  **Verify your email address** by following the instructions in the email sent by the SHIP TA Center.**.**  Contact Wisconsin SHIP director if your access request has not been approved within two business days. | SHIP director:  [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Add DHS listserv email to safe sends list. | **Add** [**widhs@public.govdelivery.com**](mailto:widhs@public.govdelivery.com) **to your email’s safe senders list** to ensure you receive important announcements about training events, reporting requirements, and funding opportunities. | [DHSBADRTech@ dhs.wisconsin.gov](mailto:DHSBADRTech@dhs.wisconsin.gov) |
| Request access to CARES Worker Web (optional). | Appendix A of the [ADRC/Aging/Tribal User Systems Access Request: Form Instructions (F-02000a)](https://www.dhs.wisconsin.gov/library/f-02000.htm) includes instructions for requesting CARES Worker Web (CWW) access. | Your on-site supervisor |
| Obtain access to the ForwardHealth interChange (optional). | Appendix A of the [ADRC/Aging/Tribal User Systems Access Request: Form Instructions (F-02000a)](https://www.dhs.wisconsin.gov/library/f-02000.htm) includes instructions for requesting ForwardHealth interChange (FHiC) access. | Your on-site supervisor |

Things to do in your first week

| **What** | **Where or how** | **Who can help** |
| --- | --- | --- |
| Review the state operations manual. | The [Benefit Specialist Programs chapter (P-03062-05)](https://www.dhs.wisconsin.gov/publications/p03062-05.pdf) and [Elder Benefit Specialist Program chapter (P-03062-05b)](https://www.dhs.wisconsin.gov/publications/p03062-05b.pdf) of the state ADRC Operations Manual explain state policy for the EBS program. | EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Add dates for Basic Training to your calendar. | For Tribal EBSs  Contact your program attorney at Judicare ([EPimentel@judicare.org](mailto:EPimentel@judicare.org)) to schedule your Basic Training.  For non-Tribal EBSs  Basic Training includes a series of self-paced online courses and live trainings for new EBSs.   * Self-paced online courses are in the [learning management system](https://eri.litmos.com/account/Login). * Live trainings are provided by EBS program attorneys.   The live Basic Training series is offered multiple times each calendar year. You only need to complete each training once. Attend each training as soon as it’s offered. Live training dates and materials are on the [EBS SharePoint Onboarding page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Onboarding.aspx). | * [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) * GWAAR EBS Training Coordinator: [Heidi.Eisner@gwaar.org](mailto:Heidi.Eisner@gwaar.org) * LMS Helpdesk:  [help@eri-wi.org](mailto:help@eri-wi.org) * EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Review dates for mandatory ongoing training and add them to your calendar. | **You must attend mandatory ongoing training** provided by your program attorney’s agency (GWAAR, SeniorLAW, or Judicare). These events are live group trainings and may include webcasts, regional in-person events, and statewide in-person events.  Find dates for mandatory ongoing trainings on the [EBS SharePoint Live Trainings page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Live%20Trainings.aspx). | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) |

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# Things to do in your second week

| **What** | **Where or how** | **Who can help** |
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| Begin online Basic Training courses. | For Tribal EBSs  Contact your program attorney at Judicare ([EPimentel@judicare.org](mailto:EPimentel@judicare.org)) to discuss prerequisites for your basic training.  For non-Tribal EBSs  **Complete the following** [**learning management system**](https://eri.litmos.com/account/login) **courses before attending Basic Training Part 1 or 2:**  eBook: Benefits Counseling in Wisconsin (19 pages)  Presentation: Introduction to Social Security Administration (5 min.)  Presentation: Title XVI (15 min.)  Presentation: FoodShare Overview (5 min.)  Intro to Medicaid  eBook: Medicaid Agencies and Systems (21 pages)  Medicaid Applications Part I (11 min.)  Medicaid Applications Part II (15 min.)  OCCT Course 1.2: Medicare Overview (30 min.)  (Log in to the [SHIP TA Center](https://www.shiptacenter.org/) to view this course.)  Presentation: SeniorCare  **Complete these** [**Basic Training webinars**](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Onboarding.aspx) **before Basic Training Part 2:**  FoodShare  ACA/MAGI/BC+  If you cannot attend live, watch the recordings, which are posted to the [EBS SharePoint Onboarding page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Onboarding.aspx). | * [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) * GWAAR EBS Training Coordinator: [Heidi.Eisner@gwaar.org](mailto:Heidi.Eisner@gwaar.org) * LMS Helpdesk:  [help@eri-wi.org](mailto:help@eri-wi.org) * EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Familiarize yourself with SharePoint. | Watch the [EBS SharePoint site tour](https://share.health.wisconsin.gov/ltc/teams/EBS/LiveTrainingMaterials/zoom_EBSSharePointTour%2006.16.21.mp4) (or [read the transcript](https://share.health.wisconsin.gov/ltc/teams/EBS/Shared%20Documents/EBS%20SharePoint%20Site%20Tour%20Transcript.docx)).  Review the [How to Use SharePoint page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Help.aspx). | EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Set up SharePoint alerts. | After getting access to the EBS SharePoint site:  [Set an alert](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Help.aspx) (automatic email notifications) on the:  [Announcements list](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/Announcements/AnnouncementsList.aspx).  [EBS Collaboration Library](https://share.health.wisconsin.gov/ltc/teams/EBS/EBSCollaborationLibrary).  [EBS Discussion Board](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/EBSForum).  Recommended alert settings:   * All changes * Someone else changes a document * Send a daily summary | EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Check that your contact information is correct in state directories. | Check that your contact information is correct in the [EBS SharePoint Directory](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryEBS).  Have your on-site supervisor update the EBS contact information in the [ADRC/Aging SharePoint Directory](https://share.health.wisconsin.gov/ltc/teams/ADRC/Lists/ADRC%20Directory_1/All.aspx). | EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Talk with your program attorney. | Your program attorney will contact you within the first couple of weeks to introduce themselves and start to get to know you.  Over time, you will discuss:   * Local supervisor vs. program attorney roles. * Annual review process, quality review, and technical assistance guidelines. * Confidentiality requirements. * What it means to be an advocate. * Relevant sections of the ADRC Operations Manual. | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) |
| Watch SHIP orientation video. | Watch the State Health Insurance Assistance Program (SHIP) and Medicare Improvements for Patients and Providers Act (MIPPA) [orientation video](https://vimeo.com/showcase/8654184/video/552486706) (30 min.)  to learn more about these grants, which support Medicare counseling in Wisconsin. | SHIP director:  [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |

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# Things to do in your first month

| **What** | **Where or how** | **Who can help** |
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| Learn about long-term care programs, including the application processes and benefits. | Aging and disability resource centers (ADRCs) are the starting point to accessing publicly funded long-term care services. Review the webpages about Family Care (<https://www.dhs.wisconsin.gov/familycare/index.htm>) and Include, Respect, I Self-Direct (IRIS) (<https://www.dhs.wisconsin.gov/iris/index.htm>). | [Your local ADRC](https://www.dhs.wisconsin.gov/adrc/consumer/index.htm) |
| Introduce yourself to your local disability benefit specialist. | [Locate your local disability benefit specialist](https://www.dhs.wisconsin.gov/benefit-specialists/counties.htm) (DBS). Disability benefit specialists serve adults with disabilities from ages 17–59.  Review the DBS’s referral process to learn how you can refer clients who transition out of the DBS program. | Your on-site supervisor |
| Complete WellSky trainings. | All EBSs, except those in Milwaukee County, should complete the WellSky/SAMS New User Training for Benefit Specialists course in the [learning management system](https://eri.litmos.com/account/login).  WellSky resources are located on the [WellSky Information for Benefit Specialists SharePoint page](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/WellSky_BenSpec.aspx). | * LMS Helpdesk:  [help@eri-wi.org](mailto:help@eri-wi.org) * WellSky Training Specialist (for training): [douglas.holmes @dhs.wisconsin.gov](mailto:douglas.holmes@dhs.wisconsin.gov) * DHS BADR Tech systems support team (for technical issues): [dhsbadrtech @dhs.wisconsin.gov](mailto:dhsbadrtech@dhs.wisconsin.gov) * EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |

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# Things to do in your first three months

| **What** | **Where or how** | **Who can help** |
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| Complete site visit with program attorney. | Your program attorney will schedule an in-pesron or virtual site visit within three months of your start date. | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) |
| Locate your local department of health or social services agency and learn about the services it provides. | Consider meeting with staff at your [local department of health or social services agency](https://www.dhs.wisconsin.gov/areaadmin/hsd-programs.htm). It can be helpful to meet individual units such as income maintenance and mental or behavioral health to learn what each unit does. | Your on-site supervisor |
| Introduce yourself to your local Social Security Administration field office. | Consider writing a letter or making a phone call to your [local Social Security Administration (SSA)](https://www.ssa.gov/locator/) field office’s manager to introduce yourself.  Ask to speak at a local SSA field office staff meeting.  Ask for an employee directory with direct numbers and extensions. | * Your on-site supervisor * [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) * [EBSs in your area](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryEBS) |
| Introduce yourself to your local Veterans Service Office. | Your local [Veterans Service Office (VSO)](https://dva.wi.gov/Pages/benefitsClaims/Veterans-Service-Organizations.aspx) can provide an overview of veterans benefits and assist with mutual clients. | Your on-site supervisor |
| Locate the independent living center that serves your area. | [Independent living centers (ILCs)](https://www.dhs.wisconsin.gov/disabilities/physical/ilcs.htm) are private non-profit agencies designed and operated by individuals with disabilities. | Your on-site supervisor |
| Shadow nearby EBSs (recommended). | Set up job shadow dates with [nearby EBSs](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryEBS) to watch client counseling (with client consent) and a Medicare outreach presentation. | [EBSs in your area](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryEBS) |

# Things to do before you start interacting with customers

| **What** | **Where or how** | **Who can help** |
| --- | --- | --- |
| Obtain your agency’s standard consent and release forms. | EBSs should use the EBS Client Services Agreement form provided by their program attorney. The GWAAR, Judicare, and SeniorLAW forms can be found on the EBS SharePoint site:   * [Document Library](https://share.health.wisconsin.gov/ltc/teams/EBS/Shared%20Documents/Forms/Forms.aspx#InplviewHashdd5008f6-a080-4002-962d-205dcc28d3be=FilterField1%3DTopic-FilterValue1%3DEBS%2520program) * [Home page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Home.aspx) under Caseload Management and Casework Guidance * [Onboarding page](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Onboarding.aspx) under Important Documents for New EBSs   In addition to the EBS Client Services Agreement, clients may need to sign agency-specific consent and release forms for you to be able to assist with their case. | * Your on-site supervisor * [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/EBS/Lists/DirectoryBSSA/BSSA.aspx) |
| Review agency policies such as confidentiality and grievance procedures. | EBSs are bound by strict confidentiality standards. These standards may be different than the standards that apply to other staff in your agency.  Review the confidentiality policy described in the [Elder Benefit Specialist Program chapter (P-03062-05b)](https://www.dhs.wisconsin.gov/publications/p03062-05b.pdf) of the state ADRC Operations Manual. | * Your on-site supervisor * EBS program manager: [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Sign up for secure email with SSA. | The [Social Security Case Escalation Guidelines (P-02009-22)](https://www.dhs.wisconsin.gov/publications/p02009-22-08.pdf) explain how to sign up for secure email with Social Security. | SSA Area Systems Coordinator (see Guidelines) |

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# Things to do after you complete your Medicare training

| **What** | **Where or how** | **Who can help** |
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| Complete the Advanced SHIP Certification Exam. | **After completing all live and online Medicare trainings, take the Advanced State Health Insurance Assistance Program (SHIP) Certification Exam**:   1. Log in to the [SHIP TA Center](https://www.shiptacenter.org/). 2. Click the green Training and Certification (OCCT) button in the upper  right-hand corner. 3. Click Certification Tool. 4. Click on the exam.   The exam is open book with no time limit. If you do not pass, review the questions you missed and retake it.  The [WI SHIP Cheat Sheet Packet (P-03179a)](https://www.dhs.wisconsin.gov/publications/p03179a.pdf) is a helpful resource. It can be found on the:   * [EBS SharePoint Document Library](https://share.health.wisconsin.gov/ltc/teams/EBS/Shared%20Documents/Forms/Ataglance.aspx#InplviewHashb71952f0-6edb-4552-b8ec-0865d38ba00b=FilterField1%3DTopic-FilterValue1%3DMedicare). * [GWAAR Medicare Outreach and Assistance Resources webpage](https://gwaar.org/medicare-outreach-and-assistance-resources) under Tools for Professionals. | SHIP director:  [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| Get your SHIP Unique ID. | **Complete the SHIP Privacy and Confidentiality training**:   1. Log in to the [SHIP TA Center](https://www.shiptacenter.org/). 2. Click the green Training and Certification (OCCT) button in the upper  right-hand corner. 3. Click Courses. 4. Under Special Topics, select [Privacy and Confidentiality](https://shipta.medicareinteractive.org/course/special-topics/privacy-and-confidentiality).   **After passing the SHIP Certification Exam**:  **Email a signed** [**Confidentiality** **Agreement** (F-02829)](https://gwaar.org/f-02829-confidentiality-agreement-for-receipt-of-cms-unique-id-ship) to the [SHIP director](mailto:michelle.grochocinski@dhs.wisconsin.gov).  Review this [video](https://vimeo.com/showcase/8664426/video/749598881) (8 min.) to learn how to use your Unique ID.  You can also download the [slides](https://www.dhs.wisconsin.gov/publications/p03153.pdf). | SHIP director:  [michelle.grochocinski @dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |