**Checklist for Newly Hired Disability Benefit SpecialistS (DBS)**

| **What** | | **Where or how** | **Who can help** |
| --- | --- | --- | --- |
| **Things to do on your first day** | | | |
|  | Work with your supervisor to obtain access to required Department of Health Services (DHS) systems. | Use these [instructions](https://www.dhs.wisconsin.gov/forms/f02000a.pdf) to complete the [ADRC/Aging/Tribal User Systems Access Request Form (F-02000)](https://www.dhs.wisconsin.gov/forms/f02000.docx). You will need access to these Department of Health Services (DHS) systems:   * [WellSky (SAMS DBS)](https://fs.harmonyis.net/adfs/ls/?wa=wsignin1.0&wtrealm=https%3a%2f%2flogin.harmonyis.net%2f_trust%2f&wctx=https%3a%2f%2flogin.harmonyis.net%2f_layouts%2fAuthenticate.aspx%3fSource%3d%252F) * [DBS SharePoint](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Home.aspx) * [ADRC SharePoint](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Home.aspx) * SHIP Reporting System   Read and sign the [Systems User Agreement Form F-00044](https://www.dhs.wisconsin.gov/forms/f0/f00044.docx).  Have your supervisor submit the completed forms to the systems support team ([DHSBADRtech@dhs.wisconsin.gov](mailto:DHSBADRtech@dhs.wisconsin.gov)).  After your WellSky (SAMS DBS) access is granted, you will receive two emails from [DHSBADRtech@dhs.wisconsin.gov](mailto:DHSBADRtech@dhs.wisconsin.gov). The first will contain your username and the second will contain your temporary password for the database.  You will receive an email from the [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm), when your access to the [DBS SharePoint](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Home.aspx) and [ADRC SharePoint](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Home.aspx) sites has been granted.  You will receive an email from [WellSky training specialist](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm), offering support as you learn how to use the WellSky (SAMS DBS) database. | Your supervisor  [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/forms/f02000a.pdf) explains how to request access to CARES Worker Web (CWW). | Your 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/forms/f02000a.pdf) explains how to request access to ForwardHealth interChange (FHiC). | Your supervisor |
|  | Request access to the learning management system. | Online courses for newly hired benefit specialists are accessed through the [Litmos learning management system (LMS)](https://eri.litmos.com/account/Login). The LMS is administered by Employment Resources, Inc. (ERI).  Complete the [online registration](https://eri-wi.org/adrc-enroll/) to enroll in the LMS. Within three business days, you will receive an email with your login information. | [help@eri-wi.org](mailto:help@eri-wi.org) |
|  | Request access to the State Health Insurance Assistance Program Technical Assistance Center. | Request access to the State Health Insurance Assistance Program Technical Assistance (SHIP TA) Center by going to <https://portal.shiptacenter.org/Login.aspx>  and clicking the green "Submit a request to be a registered user" button.  You will need to access the [SHIP TA Center](https://portal.shiptacenter.org/Login.aspx) to complete the online Medicare course as part of your initial training. | [Wisconsin SHIP director](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Update your email’s safe senders list. | DHS uses the GovDelivery email system to communicate with ADRCs and Tribal partners.  Add [widhs@public.govdelivery.com](mailto:widhs@public.govdelivery.com) to your safe sender’s list to ensure you receive important announcements about program operations, training events, and reporting requirements. | [DHSBADRtech@dhs.wisconsin.gov](mailto:DHSBADRtech@dhs.wisconsin.gov) |
| **Things to do in your first week** | | | |
|  | View the “Program Orientation for Newly Hired Disability Benefit Specialists”video series. | Your welcome email contains instructions to access the videos and links to supplementary materials. | [DBS Program Manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Review the ADRC Operations Manual. | Highlights of the [DBS chapter](https://www.dhs.wisconsin.gov/publications/p03062-05a.pdf) of the [ADRC Operations Manual](https://www.dhs.wisconsin.gov/adrc/pros/index.htm) are included in the orientation videos. | [DBS Program Manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Meet with your program attorney. | Your program attorney will contact you to schedule this meeting.  During this meeting you will discuss:   * Annual review process, quality review, and technical assistance guidelines * Confidentiality requirements * Analyzing case merit * What it means to be an advocate * Relevant sections of the operations manual | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx) |
|  | Meet with the training coordinator. | Disability Rights Wisconsin’s (DRW’s) training coordinator will contact you to schedule this meeting.  During this meeting you will review the initial training schedule and accessing initial training materials. You will also discuss how to access live virtual and in-person group events. | [Training coordinator](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Initial-Training.aspx) |
|  | Add dates for the live virtual and in-person group initial training events to your calendar. | Basic training includes a series of self-paced online courses and [live virtual and in-person group events](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Training%20Calendar/Upcoming_Basic.aspx) for new DBSs. Self-paced online courses are in the [learning management system](https://eri.litmos.com/account/Login). Live virtual and in-person group events are provided by DRW. | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx)  [Training coordinator](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Initial-Training.aspx)  [help@eri-wi.org](mailto:help@eri-wi.org)  [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Review dates for mandatory ongoing training and add them to your calendar. | [Mandatory ongoing training](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Training%20Calendar/Upcoming.aspx) is provided by DRW. All DBSs are required to attend a minimum of eight events each year. These events are live group trainings and may include webcasts, regional in-person events, and statewide in-person events. | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx)  [Training coordinator](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Initial-Training.aspx) |
| **Things to do in your second week** | | | |
|  | Begin online training | Start with these courses in the [learning management system](https://eri.litmos.com/account/Login):   * ADRC Orientation * Advocacy & DBS Confidentiality * Benefits Counseling * WellSky/SAMS New User Training for Benefits Specialists * Identifying and Responding to Conflicts of Interest * ACCESS and CARES Worker Web Query Only (optional)   You may complete the remainder of the online training courses if you wish, however you **will have to complete them again**.  The DRW training coordinator will contact you before each block of live virtual trainings to inform you of when you must complete the related online courses. If you complete the online courses before that time, you will have to complete them again.  **Note**: certain modules of the Medicare course in the [learning management system](https://eri.litmos.com/account/Login) link to the SHIP online counselor certification and training (OCCT) courses in the [SHIP TA Center](https://portal.shiptacenter.org/Login.aspx). You must log in to the [SHIP TA Center](https://portal.shiptacenter.org/Login.aspx) to complete the Medicare course. | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx)  [Training coordinator](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Initial-Training.aspx)  [help@eri-wi.org](mailto:help@eri-wi.org)  [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | View the “Using the DBS SharePoint Site” video. | Watch the [35-minute video](https://vimeo.com/showcase/8643735/video/839697089) to learn SharePoint terminology and how to navigate through the DBS SharePoint site ([handout](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/Using%20the%20DBS%20SharePoint%20Site.pdf)). | [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Set alert for the DBS SharePoint Announcements. | Use the instructions in the [Updated DBS SharePoint Alert Settings document](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/Updated%20DBS%20SharePoint%20Alert%20Settings%20May%202023.pdf) to set an alert. An alert generates an automated email when new announcements are added to DBS SharePoint site.  Access to the [DBS SharePoint site](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Home.aspx) is required to complete this task. | [Training coordinator](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Initial-Training.aspx)  [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Update your contact information on the DBS SharePoint site. | Click the “Edit” icon in the [DBS Contact List](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/DBSs.aspx) to open a dialog box. Enter the information requested in the form.  Access to the [DBS SharePoint site](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Home.aspx) is required to complete this task. | [Training coordinator](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Initial-Training.aspx)  [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
| **Things to do in your first month** | | | |
|  | Learn about long-term care programs, including the application processes and benefits. | ADRCs are the starting point to accessing publicly funded long-term care services, which includes the [Family Care](https://www.dhs.wisconsin.gov/familycare/index.htm) and  [I Respect, I Self-Direct (IRIS)](https://www.dhs.wisconsin.gov/iris/index.htm) programs. | [Your local ADRC](https://www.dhs.wisconsin.gov/adrc/consumer/index.htm) |
|  | Determine how you will maintain and organize case files. | Consider functionality, reliability, and confidentiality when making these decisions.  Talk to your supervisor about agency-specific expectations. | Your supervisor  [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx) |
|  | Determine how you will track tasks and remember important dates such as appeal deadlines and hearing dates. | Consider functionality, reliability, and confidentiality when making these decisions.  Talk to your supervisor about agency-specific expectations. | Your supervisor  [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx) |
|  | Review agency policies such as confidentiality and grievance procedures. | DBSs are bound by strict confidentiality standards. These standards may differ than the standards that apply to other staff within your agency.  It is important to complete the *Advocacy & DBS Confidentiality* course in the [learning management system](https://eri.litmos.com/account/Login) before interacting with customers. | Your supervisor |
|  | Obtain your agency’s standard consent and release forms. | In addition to the [DBS Client Services Agreement](https://www.dhs.wisconsin.gov/library/f-02562.htm), clients may need to sign agency-specific consent and release forms for you to be able to assist with their case. | Your supervisor |
| **Things to do in your first three months** | | | |
|  | 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 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 supervisor  [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx)  [Other DBSs in your area](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/DBSs.aspx) |
|  | Introduce yourself to your local elder benefit specialist. | [Locate your local elder benefit specialist](https://www.dhs.wisconsin.gov/benefit-specialists/counties.htm) (EBS). Elder benefit specialists serve older adults starting at age 60.  Review the EBS’s referral process to learn how you can refer clients who transition out of the DBS program. | Your supervisor |
|  | 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 supervisor |
|  | Locate your local Division of Vocational Rehabilitation office. | The [Division of Vocational Rehabilitation (DVR)](https://dwd.wisconsin.gov/dvr/about/locations.htm) helps people with disabilities obtain, maintain, and advance employment. | Your supervisor |
|  | Locate your local Independent Living Center. | [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 supervisor |
| **Things to do before you start interacting with customers** | | | |
|  | Confirm that your agency’s contact information is correct on the Find a Benefit Specialist web page. | If your agency’s contact information is not up to date on the [DHS Find a Benefit Specialist webpage](https://www.dhs.wisconsin.gov/benefit-specialists/counties.htm), please email the [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) with the correct information. | [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Locate SSA’s Consent for Release of Information (form 3288). | Click the Forms button on [SSA’s home page](http://www.ssa.gov) and enter 3288 in the search tool. | [Your program attorney](https://share.health.wisconsin.gov/ltc/teams/dbs/Lists/DBS%20Contact%20Information%20Internal/PADirectory.aspx) |
|  | Sign up for Secure Email with SSA | Your welcome email has more information about this task. | [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Obtain an Electronic Records Express account. | [Electronic Records Express (ERE)](https://www.ssa.gov/ere/) is an online tool that allows you to submit documents directly into an applicant’s file at the Disability Determination Bureau (DDB).  Email [electronic-records-express@ssa.gov](mailto:electronic-records-express@ssa.gov) or call 1-866-691-3061.  The help desk is staffed from 7 a.m. – 7 p.m. EST, Monday thru Friday. | [DBS program manager](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Discuss with your supervisor whether to obtain SHIP certification. | SHIP is a nationally recognized resource for trusted, unbiased Medicare counseling.  Achieving SHIP certification is encouraged but not required for DBSs.  Certified SHIP counselors are granted a Unique ID which allows counselors to contact Medicare and participating Medicare plans without the need for a separate release of information or for the customer to be on the call. | Your supervisor  [SHIP director](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
| **Things to do to become a certified SHIP counselor (optional)** | | | |
|  | Pass the certification exam. | After completing the Medicare components of initial training, take the SHIP certification exam in the [SHIP TA Center](https://www.shiptacenter.org/). Follow the instructions in the [SHIP TA Center OCCT User Guide](https://www.dropbox.com/s/5frap3g1gv3pc5n/SHIP%20TA%20Center%20OCCT%20User%20Guide.pdf?dl=0).  The exam is multiple choice and open book. There is no time limit. It may take about an hour. You may take the exam multiple times. | [SHIP director](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |
|  | Sign and submit the Confidentiality Agreement. | After passing the exam, email a signed [Confidentiality Agreement](https://www.dhs.wisconsin.gov/forms/f02829.pdf) to the [SHIP director](mailto:SHIP%20director).  Detailed instructions are available on the [Program Orientation and Initial Training page](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Initial-Training.aspx) of the [DBS SharePoint site](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Home.aspx). | [SHIP director](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) |