

**ELDER BENEFIT SPECIALIST (EBS) PROGRAM SERVICES
CY 2013 SUMMARY REPORT**

Elder Benefit Specialists (EBS) serve individuals 60 or older in obtaining or preserving public or private benefits. There is at least one EBS serving each of Wisconsin's 72 counties and 11 Native American Tribes. In total, there are currently 96 Elder Benefit Specialist positions, including 5 advocates in Milwaukee County.

This yearly report provides a synopsis of statewide statistical information for the EBS Program, such as number of client cases, monetary impact of services, type of services, clients' demographics, and outcome of closed cases.

NUMBERS SERVED IN 2013

| Number of Cases (Each client may have more than one case.) | Number of Information-Only Contacts (No case opened. Brief Contact) |
|---|--|
| 67,861 new cases were opened | 5,612 |
| 58,323 cases were closed | |
| 9,364 cases remain open as of 12/31/2012 | |

MONETARY IMPACT OF EBS SERVICES IN 2013

Monetary Impact is an estimate of the value of benefits obtained or retained with help from a benefit specialist.

- Estimated statewide impact of EBS service was \$109,234,559.
- Federal funds accounted for 79.0% of benefits gained with help from an EBS.
- State funds and other funding sources accounted for 14.5% and 6.4% respectively.
- Average monetary impact of each EBS was \$1,137,860.

CLIENT CHARACTERISTICS - Includes all clients with new cases opened in 2013

| Client Age Range | | Client Gender | | Client Race | |
|------------------|-------|---------------|-------|----------------------------------|-------|
| 60-69 | 42.1% | Female | 62.9% | White | 92.9% |
| 70-79 | 30.0% | Male | 37.1% | American Indian | 1.0% |
| 80-89 | 21.5% | | | Asian | .3% |
| 90-99 | 5.7% | | | African American/Black | 2.4% |
| 100+ | .3% | | | Native Hawaiian/Pacific Islander | .2% |
| | | | | Hispanic | 1.0% |
| | | | | Other | .3% |
| | | | | Missing / Unknown | 2.0% |

PERCENTAGE OF CLIENTS WITH INCOME AT or UNDER THE FEDERAL POVERTY LEVEL (FPL)

100% of FPL for a family of 1 = \$11,490; family of 2 = \$ 15,510; family of 3 = \$19,530
25.8% of clients served were at or below 100% of the FPL, and 71.8% were above this threshold.

ISSUES ADDRESSED IN EBS CASES (A single case may involve multiple issues)

| ISSUE | % of Cases |
|---------------------------|------------|
| Health Insurance Benefits | 75.16% |
| Income Benefits | 8.87% |
| Long Term Care Programs | 2.26% |
| Housing | 7.75% |
| Consumer Issues | 1.06% |
| Surrogate Decision Making | .48% |
| Elder Rights | .25% |

OUTCOMES OF CASES*

| Level | Total Number of Cases |
|---|-----------------------|
| Medical Paperwork/Claims Assistance Provided | 285 |
| Forms/Documents Completed - Successful Outcome | 15,669 |
| Forms/Documents Completed - Unsuccessful Outcome | 322 |
| Investigated, Action Taken - Successful Outcome | 4,199 |
| Investigated, Action Taken - Unsuccessful Outcome | 244 |
| Approved at Application | 5,719 |
| Denied at Application - Not Appealed | 141 |
| Approved at Reconsideration | 70 |
| Denied at Reconsideration - Not Appealed | 7 |
| Approved at ALJ / Fair Hearing Stage | 15 |
| Denied at ALJ / Fair Hearing Stage | 3 |
| Settlement at Negotiation without Litigation | 21 |
| Referred to Legal Services Corporation | 15 |
| Referred to Private Pro-Bono Attorney | 45 |
| Referred to Private Not Pro-Bone Attorney | 45 |
| Other Referral | 858 |
| Client Withdrew - Lack of Contact | 741 |

*An additional 1,321 cases were closed in Milwaukee County - but could not be assigned to a corresponding outcome category because Milwaukee uses a different outcome system.

TRAINING AND TECHNICAL ASSISTANCE FOR EBS

Initial and ongoing training is provided by Attorneys from the Greater Wisconsin Agency on Aging Resources (GWAAR), SeniorLaw and Wisconsin Judicare. Attorneys also provide substantive case supervision.

In addition, as State Health Insurance Assistance Counselors, EBS avail themselves of training opportunities that are offered each year through the Centers for Medicare and Medicaid Services.

