



Disability Benefit Specialist Program

2018 Summary Report

When a person with disabilities seeks to apply for disability benefits such as Social Security, Medicaid, Medicare, or Foodshare, or encounters a barrier to accessing benefits they already have, it can be a confusing, frightening experience. The individual may ask: How does the benefits application process even work? Why have I been denied eligibility? Is there anything I can do to appeal that decision? What happens if I have already been awarded benefits, but am now being told that I no longer qualify?

For situations like these, disability benefit specialists are here to help. Disability benefit specialists serve people with disabilities in Wisconsin who are 17 years and 6 months to 59 years old. These professionals help their clients access disability benefit programs like Social Security, Medicaid, Medicare, and other public and private benefits, thus empowering people with disabilities to obtain health insurance, food, shelter, medical care and other critical life needs. Disability benefit specialists assist their clients in many ways, including:

- Explaining** the eligibility criteria for disability benefit programs;
- Developing** advocacy strategies that ensure agency decision makers have the information they need to make an informed decision regarding a client's eligibility for disability benefits;
- Assisting** individuals who encounter difficulties accessing or retaining their benefits eligibility during the post-award period.

Every client's case is unique. Working with a disability benefit specialist does not guarantee a favorable result for any client regarding a given disability benefits matter. Clients who do work with disability benefit specialists gain more than just knowledge of disability benefit programs. They gain access to a network of knowledgeable, experienced advocates who have a proven track record of providing effective service on behalf of people with disabilities in Wisconsin.

Disability benefit specialist services are available statewide.

All aging and disability resource centers (ADRCs) across Wisconsin offer disability benefit specialist services.

The Great Lakes Inter-Tribal Council employs three disability benefit specialists to serve tribal members who live on or near a Wisconsin reservation.

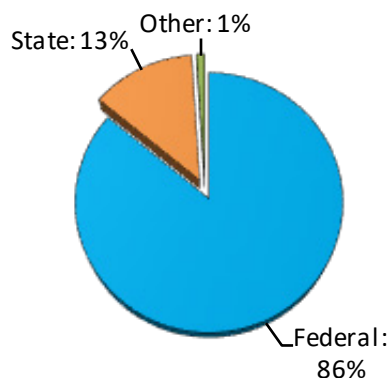
The Department of Health Services Office for the Deaf and Hard of Hearing, employs a disability benefit specialist to serve individuals who use American Sign Language.



Disability benefit specialist services make a positive impact.

In 2018, DBSs helped people with disabilities access nearly **\$73 million** worth of services, which helped to stabilize household budgets and lessen their reliance on local crisis and emergency services. Federal funds accounted for a majority of the benefits provided, while state and other funds, such as private donations, made up the remainder.

2018 Estimated Monetary Impact



Estimated monetary impact
of all DBS services in 2018:

\$72,845,910

Estimated monetary impact*
per DBS in 2018:

\$877,661

*This average is based on a total of 83 full-time equivalent positions.

DBSs help with a wide range of benefit issues.

A client's case frequently involves multiple, interrelated disability benefit issues. For example, a single case could involve eligibility concerns for Social Security, Medicaid, Medicare, and FoodShare. The top 10 disability benefit program topic issues for cases that were closed in 2018 are listed below.

Top 10 Disability Benefit Program Topic Issues of 2018	Percent of 2018 Cases
Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI): Eligibility	27.2%
Medicaid Purchase Plan (MAPP): Eligibility or Enrollment	11.0%
Medicare Part D Options and Enrollment	8.4%
SSI and SSDI: Post-Entitlement Issues (including Continuing Disability Reviews (CDRs), overpayment notices, etc.)	6.6%
Medicare Savings Programs: Eligibility or Enrollment	6.3%
FoodShare: Eligibility or Enrollment	5.6%
BadgerCare Plus: Eligibility or Enrollment	4.0%
Benefit Check-Up*	4.0%
Medicare Advantage: Options and Enrollment	3.5%
Medicare: General Eligibility	3.3%

***Note:** A 'Benefit Check-Up' is unique from the other topic areas in that it does not reference a specific disability benefit program. Rather, disability benefit specialists conduct Benefit Check-Ups with clients in order to review their current benefits and allow the client an opportunity to ask any questions they may have regarding their various disability benefit programs.



Disability benefit specialists maintain a high caseload.

A disability benefit specialist opens a client “case” for each issue or set of interrelated issues that he or she helps to resolve. A case may remain open for one day or several months, depending on the nature of a client’s issue(s). Client issues that require less than 30 minutes to resolve are recorded as “information-only” contacts.

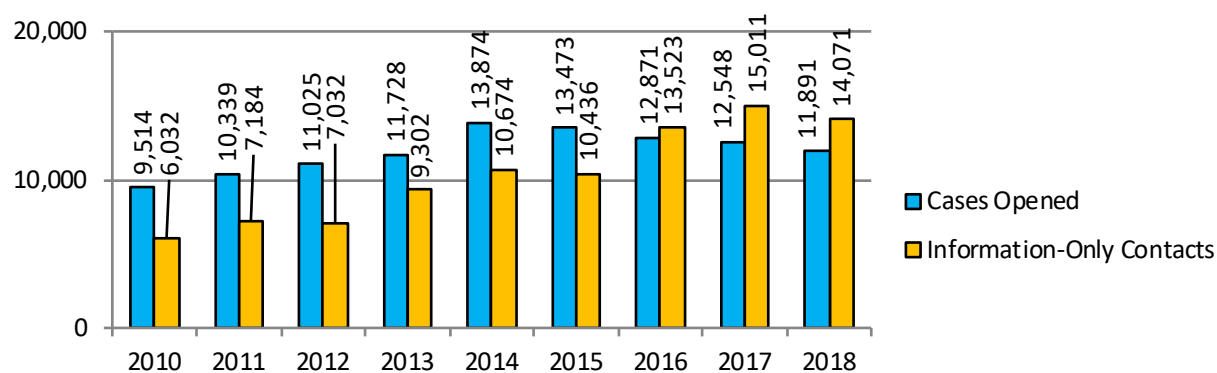
Disability benefit specialist activities in 2018		Statewide	Average per Full-Time Disability Benefit Specialist*
Number of Cases	Carried over from 2017	4,028	49
	Opened in 2018	11,891	143
	Closed in 2018	11,238	135
Number of Information-Only Contacts		14,071	170

*These averages are calculated based on a total of 83 full-time equivalent positions.

Disability benefit specialist services are available statewide.

The number of people receiving disability benefit specialist services has grown significantly since the program’s inception in 2007. While the overall number of opened DBS client cases decreased slightly in 2018, as compared with 2017, this adjustment should be viewed in comparison with the historic drop in the number of federal disability benefit applications filed nationally over the past few years.¹ The 2018 case statistics clearly demonstrate that people with disabilities in Wisconsin continue to find great value in the work performed by disability benefit specialists.

Number of Disability Benefit Specialist Cases and Contacts 2010-2018



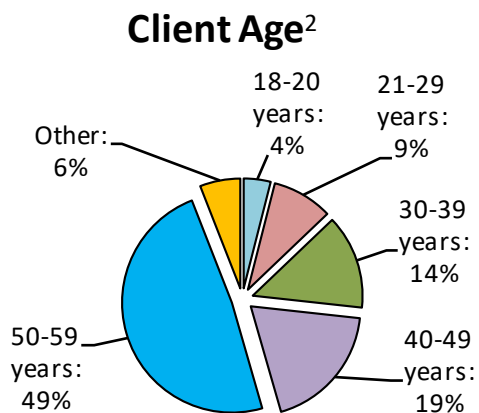
¹ See: “Applications for Disability Drop, Adding 4 Years to Program’s Life” p. A1, New York Times, June 19, 2018.

Disability benefit specialists reach diverse populations.

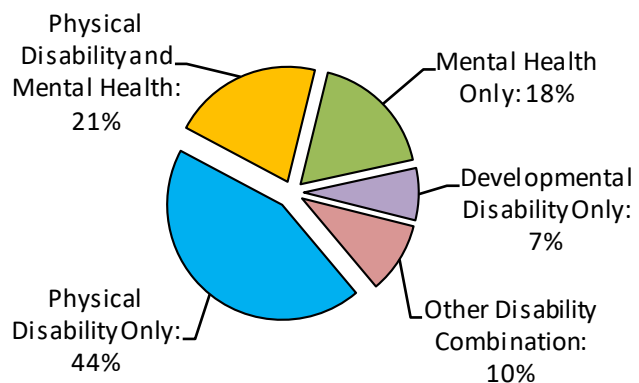
Disability benefit specialists serve people regardless of income or disability type. Disability benefit specialists assist youth who are at least 17 years and 6 months old, who are transitioning to adult benefits, as well as adults, ages 18 through 59 years. (Elder benefit specialists provide similar services to adults ages 60 and over through ADRCs.)

Client Income²

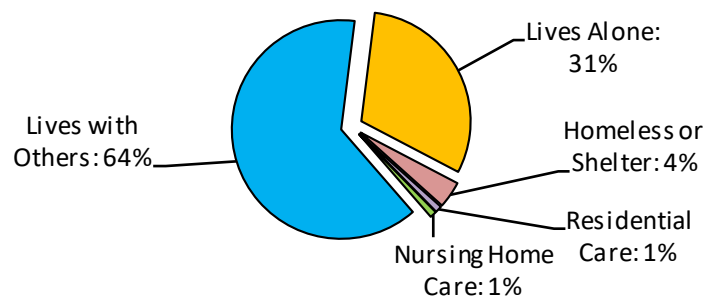
Over 74% of disability benefit specialist clients had incomes at or below 120% of the federal poverty level.



Disability Types of People Served²



Client Living Arrangement²



Disability benefit specialists receive extensive training and technical assistance.

Disability benefit specialists receive extensive training and opportunities for skill building, and have extensive access to expert technical assistance from the Wisconsin Disability Benefits Network and Disability Rights Wisconsin and Wisconsin Judicare.

Wisconsin Disability Benefits Network coordinates initial training for newly hired DBSs, with subject matter expertise provided through a subcontract with Disability Rights Wisconsin; this training is also available to new DBS assistants and supervisors. The

² All 2018 DBS client data are based on clients for whom a case was opened. The data exclude people whose demographic status was unknown or unreported.

standard training program for a new DBS includes 40 hours of online training where new disability benefit specialists learn the fundamentals (eligibility criteria, financial determination, application and appeal procedures, etc.) of federal benefit programs; four days of in-person training, which builds on the online training and offers an opportunity for new disability benefit specialists to complete a series of hands-on training exercises that simulate common issues faced by clients; and job shadowing with an experienced disability benefit specialist

Disability Rights Wisconsin provides ongoing training, technical assistance, and case oversight to all disability benefit specialists. A staff of eight program attorneys, one training coordinator, and one managing attorney are employed under contract with the Department of Health Services. Examples of recent training topics are listed below.

- DBS confidentiality standards
- Disability determinations
- Benefit appeals
- SSI financial eligibility
- Debt collection
- Health insurance topics
- Mental health listing criteria
- Housing accommodation requests
- Case strategy development
- SSA overpayments

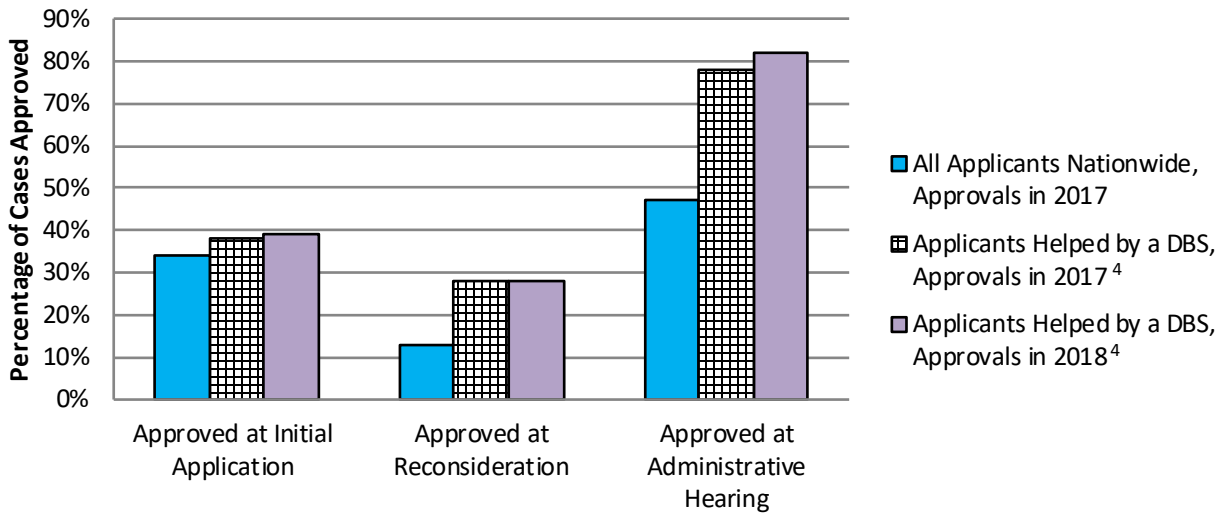
Wisconsin Judicare, Inc. provides program attorney services to DBSs who are employed by the Great Lakes Inter-Tribal Council, including training on benefit issues unique to tribal members, technical assistance, and case oversight.

Disability benefit specialists play a key role in disability determination cases.

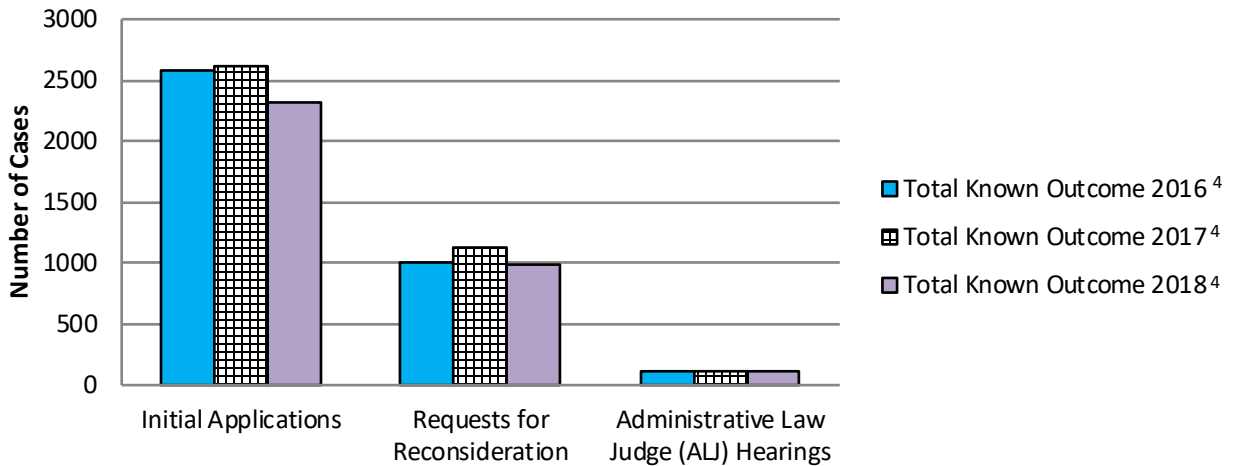
Disability benefit specialists help people access needed disability benefits, including SSDI and SSI. Wisconsin's program data indicate that people who obtain disability benefit specialist assistance may be more likely to receive a favorable decision. This comparative advantage is the result of working with seasoned professionals who are highly trained on many different types of disability benefits and have prior experience with the complex processes used by state and federal agencies to determine initial and continued eligibility for these programs. Of course, working with a disability benefit specialist cannot ensure that a given client's application or appeal will be successful; the facts for every client are different, and results will vary accordingly. The statistics, however, illustrate concretely the impact that working with a disability benefit specialist can make for disability benefit applicants in Wisconsin. These charts compare approval rates for SSDI only, SSI only and concurrent SSDI/SSI cases combined. (An approval occurs when a person is granted Social Security benefits.)³

³Most recent SSA numbers (2017) taken from Social Security Administration (SSA) Fiscal Year (FY) 2019 Budget Justification, FY 2017 Disability Workload, p. 206, available at <https://www.ssa.gov/budget/FY19Files/2019CJ.pdf>.

DBS Approval Rates Compared to National Approval Rates



DBS Assistance with SSA Benefit Applications, Reconsiderations, and Hearings



More information about disability benefit specialist services is available.

For more information about disability benefit specialist services, including local agency, contact information, visit the Wisconsin Department of Health Services [DBS website: https://www.dhs.wisconsin.gov/benefit-specialists/dbs.htm](https://www.dhs.wisconsin.gov/benefit-specialists/dbs.htm) or contact the Bureau of Aging and Disability Resources at 608-266-2536.

⁴ The data include SSA benefit matters at various stages, including initial application, reconsideration, and administrative law judge hearings. The data exclude cases with outcomes listed as unknown, pending, or withdrawn prior to the issuance of a decision. Reasons for a pending or unknown outcome may include the provision of information-only services, client withdrawal, or lack of contact, or referral to a private attorney.