

## Florence County Job Description

**Position Title:** Elderly Benefits Specialist (EBS)

**Department:** ADRC/Aging Unit

**Reports To:** ADRC Director, in close collaboration with the EBS program attorney who provides substantive case oversight.

**FLSA Status:** Full-Time (24 hours per week)/Non-Exempt – combined position with Disability Benefits Specialist

**Salary Range:** \$19-24 (Based on education & Experience)

**Salary Grade/Level:** 8

**Position Summary:** Provide, through a continuum of county-based elderly-benefit specialist services and area-wide legal-advocacy services, broad access to benefits, entitlements, and legal rights for older persons throughout Florence County. Plan, prepare and deliver programs and services to meet all regulatory requirements for the Elderly Benefit Specialist Program.

**Duties of Elderly Benefit Specialist:** (s.46.81, Wis. Stats) “Benefit Specialists shall offer information, advice and assistance to older individuals related to individual eligibility for, and problems with, public benefits and services and to health care financing, insurance, housing and other financial and consumer concerns. Benefit Specialists shall refer older individuals in need of legal representation to the private bar or other available legal resources.”

### Essential Functions:

- Act as liaison on benefit issues such as application, appeals, and advocacy relating to public benefits including, but not limited to: Medicare, Medicare supplemental insurance, supplemental security income (SSI), Social Security, medical assistance, food share, long term care services, Homestead Tax, and other legal benefit programs and problem resolution.
- Investigate and prepare factual evidence and briefs for denied benefit appeals; provides advocacy and representation for customers in matters which require review, waiver, reconsideration or hearings up to the Administrative Law Judge or the Office of the Commissioner of Insurance level under the direction of legal back up supervising attorneys and communicates with other agencies as necessary throughout the process.
- Consult regularly with program attorney regarding individual cases and general caseload.
- Comply with applicable federal and state laws, administrative rules, established agency and county policy and procedure, and accepted professional standards and directions by the supervising program attorney and the ADRC Director.
- Make referrals to other agencies and services, when appropriate.
- Complete and submit all required paperwork (e.g., 100 percent time reporting spreadsheets, EBS database reports) in a timely manner.
- Provide education and advocacy on current benefits and entitlements and in asserting and maintaining rights promised and protected by law. This can be done through conducting outreach, home visits, and providing information to alert customers of their rights, benefits, and entitlements. May also provide consumer advocacy through media, public speaking and individual contracts.
- Compiles, organizes, and enters data for reporting to immediate supervisor, oversight committees, governing boards, county board, oversight attorneys, Area Agency on Aging, Office of Resource Center Development, State Department of Health Services, and Federal Authorities and granting authorities.
- Schedule, organize, coordinate, promote and conduct regular off site services through the Elderly Nutrition Sites and other locations as appropriate in addition to regular office hours at the administrative site.
- Develop and maintain accessible services to homebound older adults in Florence County including the provision of in-home visits when appropriate.
- Maintain confidentiality in client records, documenting all actions taken and follow-up thoroughly until resolution of problem to ensure compliance with federal and state regulations, policies and procedures and resulting in a complete and accurate client file and reporting via the EBS database.
- Perform research and investigate issues and cases as needed to resolve customer issues/concerns.

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- Follow all policies and procedures of the program as directed by the supervising program attorneys and Florence County.
- Research, write and edit appropriate and timely news articles for use by media and/or in agency newsletters.
- Participates in on-going training, maintaining and updating a comprehensive contemporary knowledge base of benefit resources, including health care financing, income maintenance, home and community-based services, consumer finance and other elder law areas and to ensure compliance with local, state and federal program requirements and regulations.
- Serve as a technical resource for staff and other organizational personnel within the area of Elderly Benefits.
- Initiate advocacy, which has consequences of broad significance in preserving, protecting and expanding the rights and benefits of older persons.
- All other duties as assigned.

### **Supervisory Requirements:**

- N/A

### **Education:**

- Bachelor of Arts or Science degree (preferably in a health or human services related field) or a license to practice as a registered nurse in Wisconsin pursuant to s. 441.06 Stats, and at least one year of experience working with at least one of the client populations of the Aging and Disability Resource Center; or
- Equivalent experience and/or education with approval via a waiver from the Wisconsin Department of Health Services (DHS) is necessary by contract in the event that the candidate lacks the degree and/or experience described above and the ADRC chooses to request an exception. Such approval is at the discretion of DHS.
- Must successfully complete initial and ongoing trainings as required by DHS, Greater Wisconsin Agency on Aging Resources (GWAAR) and the Florence County.

### **Knowledge, Skills and Abilities:**

Any equivalent combination of training and experience, which provide the following knowledge, skills and abilities:

- Ability to communicate courteously and effectively with coworkers, customers, the community and other professionals in person, by phone and in writing.
- Must have strong interview and active listening skills with customers to build rapport in a supportive manner.
- Ability to provide a welcoming atmosphere to effectively deliver positive customer service.
- Strong computer skills in Word and Excel and the ability to effectively utilize required software and database programs
- Ability to interpret and apply federal, state and local policy and guidelines.
- Knowledge and understanding of target populations served by the ADRC, and experience with public benefits preferred.
- Competency in public speaking and engaging community members and professionals.
- Maintain required confidentiality in client and personnel records where appropriate.
- Experience and ability to provide exceptional service levels to program participants in a community/social work setting.
- Ability to establish priorities for service intervention, and deal tactfully with difficult situations.
- Ability to maintain good working relationships and cooperation with other government agencies and public service providers to improve benefit delivery system for older adults being served.
- Ability to travel. Must possess a valid Wisconsin driver's license and have access to a reliable personal transportation with adequate auto insurance to meet minimum County requirements or other reliable means for local and state wide travel.

### **Physical Requirements:**

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- Frequently required to stand, walk, sit, use hands and fingers to handle or feel, reach with hands and arms, talk or hear. Occasionally required to stoop, kneel, or crouch.
- Occasionally required to sit and taste or smell.
- Regularly lift and or move up to 15 pounds and occasionally lift or move up to 25 pounds.
- Vision requirements include close, distant, color, peripheral, depth and ability to adjust focus.

#### **Work Environment:**

- Office environment. Minimal noise level.
- Regularly exposed to outside weather conditions.
- Work in client homes & the community as needed.

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### Employee Acknowledgement:

I acknowledge that I have received a copy of the Elderly Benefits Specialist job description and understand that it is my responsibility to read and understand it. I am able to perform the essential functions as outlined with or without reasonable accommodation. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Florence County is an Equal Opportunity Employer. Florence County does not discriminate on the basis of any Wisconsin or Federal protected classification. In compliance with the ADA, Florence County will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective employees and incumbents to discuss accommodations with their employer and/or supervisor.

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Signature

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Date

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Printed Name

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#### List of Acronyms in position description

ADRC = Aging and Disability Resource Center  
DHS = Department of Health Services  
GWAAR – Greater Wisconsin Agency on Aging Resources  
OAA = Older Americans Act  
ORCD =Office of Resource Center Development