

## General Program Areas

EBS staff receive in-depth, ongoing training in the following areas:

- Medicare
- Medicaid
- Social Security
- Supplemental Security Income (SSI)
- FoodShare
- Housing
- Consumer Debt
- Other Health Insurance

## Specific Program Services

Within these general program areas, EBS staff engage in a wide variety of services including:

- Providing information on program eligibility criteria
- Assisting with applications for a wide range of public benefits
- Appealing application denials, terminations, or reductions in benefits
- Conducting initial reviews of agency decisions
- Advocating at administrative appeals level

Potential EBS clients should contact the Aging & Disability Resource Center (ADRC) of Dane County's Call Center by calling (608) 240-7400.

## EBS Program Referral Process

By calling the ADRC, an Information and Assistance Specialist will discern their particular issue and, in many cases, assist the client to resolve the issue or they will escalate it to EBS staff through an internal referral to the program. EBS staff will then review the case and determine if they are able to provide assistance.

*Even though EBS staff engage in general outreach activities throughout their communities, they are prohibited from calling older individuals who have not requested program services, regardless of the referral source.*

If you know someone who might benefit from the services provided by an EBS staff member, you should have the senior adult contact the ADRC directly to request assistance. This preserves the confidentiality of the senior adult and supports his or her autonomy to make a decision about whether to become a client of the program.

This brochure was adapted from the Greater Wisconsin Agency on Aging Resources' *Ethical Guidelines of Wisconsin's Elder Benefit Specialist Program* brochure (7/8/16).

## Area Agency on Aging of Dane County Elder Benefit Specialist Program



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*Co-located in the Aging & Disability  
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The Area Agency on Aging of Dane County  
is a unit of the Dane County Department



## Overview

The Elder Benefit Specialist Program was created in the late 1970s by the Wisconsin legislature as a unique way to provide legal advocacy services to older residents of the state.

At least one Elder Benefit Specialist (EBS) serves every county and tribe in Wisconsin. EBS staff provide free legal services and advocacy to residents who are at least 60 years old. Their services are specifically targeted to rural, low-income, and minority older populations who have not traditionally had access to legal assistance.

The EBS program is funded through a combination of local, state, and federal funds.

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## EBS Advocacy Efforts

The purpose of Wisconsin's EBS program is to provide broad access to public benefits and legal rights to older persons throughout the state.

An EBS staff member's most important role is as an **advocate** for senior adults. In this role, EBS staff owe their entire devotion to the interests of the client.

## Ethical Guidelines

The ethical guidelines of the EBS program help EBS staff serve their client's interests. These ethical guidelines come from a variety of sources, including the Older Americans Act and the Wisconsin Supreme Court's Rules of Professional Responsibility for attorneys.

The following are three key ethical concepts that govern EBS staff in their work:

### 1. Identifying the Client

EBSs cannot work with anyone other than a client. This ensures that clients have the freedom to determine what is in their own best interests.

The exception is if a client makes clear, with documentation, that involving a third party is appropriate, or has an agent with activated Power of Attorney for Finances or court-ordered guardianship paperwork.

*The client is always a senior adult and is never a senior adult's family member, concerned neighbor, medical provider or any professional in the community who is assisting the senior adult.*

**EBSs strive to promote and preserve the autonomy, dignity, independence, and financial security of clients.**

### 2. Client-Centered Solutions

Clients must make the final decisions necessary to find solutions to specific issues. The role of EBS staff is often to assist in identifying all of the options for the client to choose from.

*EBS staff cannot take any action that will limit a client's right to self-determination.*

### 3. Ensuring Confidentiality

EBS staff operate under strict confidentiality rules. The underlying issue is that effective legal assistance and representation requires clients to disclose detailed financial, medical, and personal information to EBS staff. Without the guarantee of confidentiality, the client would be reluctant to provide such information.

*EBS staff can never discuss a client's case with a third party unless a client agrees to such communication.*

