

## **RICHLAND COUNTY POSITION DESCRIPTION**

**Position Title:** Elderly Benefit Specialist

**Department:** Health and Human Services

**Reports to:** Aging & Disability Resource  
Center Manager

**Pay Grade:** H

**Date:** December 1, 2023

**Hours Per Week:** 40

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### **PURPOSE OF POSITION**

The elder benefit specialist (EBS) provides information, assistance, and advocacy with public benefits, housing, and customer issues to individuals 60 years of age and older. The EBS coordinates outreach and education to older persons, service providers, and professionals in the community. The EBS acts as a consultant to other service providers and professionals.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

**The following duties are normal for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.**

- Use interpersonal skills and interviewing techniques, such as active listening, to communicate in writing, by phone, or in person either in the office or in the client's home.
- Provide comprehensive and clear information and assistance on public benefits to older adults that will enable them to understand and obtain the services or benefits to which they are entitled.
- Maintain accurate and complete client records documenting action taken.
- Prepare factual evidence and briefs for denied benefits appeal hearings and benefit adjustment hearings. Seek legal advice from a supervising attorney on issues such as approach, rules, and regulations.
- Represent clients at administrative hearings as a benefit specialist.
- Conduct necessary research and make necessary contacts to ensure the provision of accurate and timely information.
- Provide education, outreach, and advocacy to the Medicare beneficiaries of Richland County.
- Assist Medicare beneficiaries in the enrollment process by running Part D plans on the Medicare website, explaining the difference in plans, and providing computer printouts of the different plans so the consumer can make informed decisions.
- Assist individuals with applications for Medicare Savings programs, SeniorCare, and Medicaid.
- Prepare, present, and submit reports to the Aging and Disability Resource Center Manager, Commission on Aging and Disability committee, and Area Agency on Aging.
- Schedule and conduct informational seminars and presentations reaching senior citizens to help older adults better understand their rights under various entitlement programs.
- Prepare articles and Public Service Announcements for Richland County Health and Human Services newsletter, local newspapers, local radio station, and local cable television station.

- Provide insurance benefits counseling and form completion assistance. Act as a client advocate regarding insurance issues including plan change recommendations and submitting State Insurance Commissioner complaints.
- Communicate regularly with the supervising attorney.
- Recruit and train volunteers to assist with Medicare Part D season and other Elder Benefit specialist-related programs ensuring volunteers are adequately trained to perform their roles and are fully informed about rules regarding confidentiality and conflict of interest.
- Maintains strict client confidentiality.
- Provide backup coverage to the ADRC Specialist position as needed when there are staffing shortages. This includes meeting with walk-in clients and providing information and resources related to the needs of the consumer.
- Provide backup coverage for the ADRC reception desk as needed.
- Represent Richland County Health and Human Services to the community at large and maintain good community public relations.
- Comply with applicable federal and state laws, administrative rules, established agency procedures, and accepted professional standards.
- Participate in ongoing training, maintaining knowledge to ensure compliance with federal and state regulations.
- Maintain the confidentiality of client information and protected health information as required by State and Federal regulations, including the Health Insurance Portability and Accountability (HIPAA) Act of 1996.

#### **MINIMUM TRAINING AND EXPERIENCE REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS**

- Bachelor's degree in a human service-related field with State of Wisconsin Social Work certification preferred, and at least one year of experience working with individuals of the target populations.
- Knowledge and experience in areas such as public benefits, entitlements, insurance, consumer issues, long-term care service systems, and legal systems.
- Excellent written and oral communication skills.
- Working knowledge of computers, computer programs, typing, and data entry.
- Current WI driver's license and unlimited access to reliable transportation.

#### **PHYSICAL AND MENTAL ABILITIES REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS**

##### **Language Ability and Interpersonal Communication**

- Ability to analyze data and information using established criteria, to define consequences, and to consider and select alternatives.
- Ability to assemble, copy, record, and transcribe data.
- Ability to understand and use advisory data and information such as financial statements, technical operating manuals, procedures, guidelines, non-routine correspondence, and laws.
- Ability to advise and interpret how to apply programs, procedures, and standards to specific situations.
- Ability to counsel, treat, and mediate, which may include providing first-line supervision.
- Ability to persuade and convince others.
- Ability to communicate verbally and in writing with the elderly (60 years or older), tax and Social Security personnel, county Human Service personnel, state Medicare

personnel, the general public, medical personnel, nursing home personnel, and others as needed to accomplish job responsibilities.

**Mathematical Ability**

- Ability to add, subtract, multiply, divide, and calculate decimals and fractions.
- Ability to compare, count, differentiate, measure, and/or sort data and information.
- Ability to classify, compute, tabulate, and categorize data.

**Judgment and Situational Reasoning**

- Ability to apply situational reasoning ability by exercising judgment in situations involving the evaluation of information against measurable criteria.
- Ability to use functional reasoning development in the performance of semi-routine functions involving standardized work with some choice of action. Ability to lead others and reinforce thinking to perform tasks.
- Ability to apply abstract thinking to perform tasks.
- Ability to work independently.
- Ability to interpret a variety of instructions in written, oral, diagram, or schedule form.
- Ability to use independent judgment frequently in non-routine to occasionally highly unstable situations including decisions on implementing client service and treatment plans to encounters with potentially suicidal and violent clients.
- Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.

**Physical Requirements**

- Ability to coordinate eyes, hands, feet, and limbs in performing coordinated movements in operating educational aids and office equipment.
- Ability to exert moderate effort in sedentary to light work, including stooping, kneeling, and crouching. Ability to handle, finger, and feel. Ability to lift and carry.
- Ability to recognize and identify degrees of similarities and differences between characteristics of colors, forms, sounds, odors, textures, etc. associated with objects, materials, and ingredients.
- Ability to physically respond to a variety of settings to provide services, including offices, community locations, and private residences.
- Ability to operate a motor vehicle.

**Environmental Adaptability**

- Ability, concerning environmental factors such as temperature variations, noise, disease, and/or dust, to work under moderately safe and comfortable conditions.
- Ability to visit environments with a moderate risk for disease or physical harm.

Richland County is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the County will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

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Employee's Signature

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Supervisor's Signature

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Date

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Date

