

DISABILITY BENEFITS SPECIALIST**DSD019****Program Purpose**

Milwaukee County DSD has developed a Disability Resource Center (DRC) that is certified by the State of Wisconsin Department of Health Services (DHS) as part of a project to expand Family Care and other publicly funded long term care options in Milwaukee County.

An integral function of the DRC is Disability Benefits Counseling which assists all Milwaukee County residents who are interested in seeking and obtaining private or public benefits such as Family Care, Family Care Partnership, Supplementary Security Income (SSI), Social Security Disability Income (SSDI), Medicaid or other benefits for which they are eligible. The Disability Benefits Counseling program must meet the performance goal in the Aging and Disability Resource Center (ADRC) Contract which states: Adults with developmental disabilities, physical disabilities, mental illness and/or substance abuse disorders receive information about, and assistance in, obtaining or retaining public and private benefits for which they are eligible.

The Disability Benefits Counseling program must provide sufficient Disability Benefit Specialists (DBS) and appropriate supervision and day-to-day support to provide the disability benefits counseling services required of the DRC. The DBSs must meet the qualifications and initial and ongoing training requirements outlined in the DHS ADRC Contract.

The Disability Benefit Specialists must provide the mandatory Core Services identified in the DHS DBS Program Services Scope of Services (August 2008 or as updated by DHS). These services must be provided in locations frequented by individuals who might be seeking DBS services, at the Disability Resource Center, at locations convenient to these individuals or at an individual's home if necessary.

The DBSs is a valuable and vital component of the DRC's services. It is appropriate that DBSs be involved in DRC staff orientation and training, as well as have DBSs participate in client specific staffing or planning sessions as appropriate. The DBSs also provides outreach to promote the DRC and Disability Benefits Specialist Program services in Milwaukee County. The DRC distributes brochures about the Disability Benefit Specialist program to consumers as applicable and as part of its outreach and information and assistance efforts.

The DBSs only serves individuals referred for disability benefits counseling by the Disability Resource Center. The agency hiring the DBSs shall not promote its own phone number for people seeking disability benefits counseling.

Required Program Inputs, Processes, and Program Activities

The Disability Benefits Specialists shall perform the following activities in compliance with the DHS ADRC contract:

1. Provide accurate and current information on private and public government benefits and programs;
2. Provide information and technical assistance about how to access such benefits and information about the responsibilities of program participants;
3. Assist applicants for both private and public benefits and programs to locate and gather verifying data, both financial and non-financial;
4. Provide information on consumer rights, complaints, grievance and appeals processes;
5. Provide advice and assistance in preparing and filing complaints, grievances and appeals;
6. Make appropriate referrals for employment and other disability-related counseling and services (e.g., to Independent Living Centers, Pathways to Independence, Benefits Planning Assistance and Outreach, Division of Vocational Rehabilitation, and Disability rights Wisconsin);
7. Provide representation as appropriate, for individuals with developmental disabilities, physical disabilities, substance use disorders or mental illness as needed in administrative hearings or other grievance steps;
8. Consult with disability benefit specialist program attorneys working for or with or under contract to the disability benefits specialist program administered by DHS;
9. Initiate investigations to gather needed factual information to perform advocacy duties;
10. Do not disclose information about a client without the informed consent of the client, unless required by law;
11. Provide consumer and volunteer training and technical assistance to develop self and family advocacy;
12. Negotiate on behalf of individuals with county agencies, managed care organizations, service providers or the state regarding disputes over long-term care, mental health and substance abuse services; and
13. Identify and document concerns and problems of individuals with developmental disabilities, physical disabilities, mental illness and/or substance use disorders and related system-level issues and present that information to appropriate entities.

DBS staff members will be located in the DRC at 1220 W. Vliet St., Milwaukee, WI. This will facilitate strong communication, in addition to helping consumers access the DBSs. *However, DSD is willing to discuss the location for DBS staff with proposers, and proposals should describe the advantage of any alternative location.* The DBSs will also have regularly scheduled meetings, at a minimum quarterly, to provide training and review current program information with the DRC staff. This will provide a forum for ongoing DRC training and individual case consultation and problem solving to ensure quality customer service. As applicable, identified staff from Income Maintenance will participate in these information and ongoing consultation forums.

The DRC will make available to the on-site DBS staff basic business tools such as a telephone, high-speed internet access, printer, computer, desk and a lockable file cabinet. The DRC will also provide a private workspace for the DBS to facilitate confidential online or telephone applications, as appropriate space to meet with clients in a confidential setting.

The DBSs will be expected to use the MIDAS management information system for all client services documentation. The agency hiring the DBSs should have the capacity to utilize MIDAS. The DRC will provide the DBSs with MIDAS training. The system will be used for required DHS Medicaid Administration 100% time reporting. Clients who call the DRC and are referred for DBS services will be logged in MIDAS by the DRC. Staff will also use Forward Health and CARES.

Through the contract for DBS services the DRC is responsible for providing overall direction to the DBSs, but the agency hiring the DBSs will be responsible for day-to-day supervision. This supervision should include:

1. direction in the daily job performance of the DBS, including attendance, time management, DHS MA Administration 100% time reporting, productivity and prioritization of non-case specific functions such as outreach and community education;
2. insuring that referrals are responded to in a timely manner, that all services are documented on MIDAS and that meetings with clients occur in locations convenient to individuals or in their home, if necessary;
3. insuring that the DBSs attend all ongoing meetings and trainings of the disability benefit specialists as coordinated and organized by the program attorney's, meetings of the Wisconsin Disability Benefits Network, and any other trainings required by DHS;
4. adherence to relevant employee policies and procedures and DRC policies and procedures regarding Conflict of Interest and the Consumer Rights and Complaints/Grievances process;
5. direction regarding outreach to target populations in coordination with the outreach strategies of the DRC;
6. incorporating guidance from the program attorney around issues related to caseload size and composition;
7. completion of employee performance evaluations with input from the program attorney regarding substantive knowledge and performance, the DRC regarding timeliness and effectiveness of providing disability benefits counseling to persons referred and the DHS program manager regarding client data reporting data; and
8. timely maintenance and delivery of the DBS database to DHS on request.

The DRC will monitor the timeliness of the DBS' response to referrals and conduct consumer satisfaction surveys of individuals receiving service and assistance from the DBS. Data will be collected on the success of the DBSs to assist customers with obtaining either private or public disability benefits, obtaining medical assistance or

other health coverage and number of referrals to local employment-related agencies. The DRC have available to clients overall information about the process for filing grievances, including filing a grievance regarding DBS services. The DBSs will provide clients with a copy of the DRC Consumer Rights, Complaints/Grievances Process handout.

Stakeholders and partners vital to the implementation of a DBS in the DRC include the State of Wisconsin Income Maintenance (the replacement for the Milwaukee County DHHS Economic Support Division), Workforce Development Center, Division of Vocational Rehabilitation, Social Security, Milwaukee County Department of Aging, the Housing Authority, the Long Term Support Committee, area school districts, ARC, NAMI of Milwaukee County, local hospitals and other social service agencies with which Milwaukee County contracts.

Public awareness of DBS services will be assured by readily disseminating information to the general public through a variety of sources by both the agency hiring the DBSs and the DRC.

The disability benefit specialist services must comply with confidentiality standards outlined in the Disability Benefit Specialist Program Policies and Procedures. As required in the Disability Benefit Specialist Program Policies and Procedures, the DBSs shall use a Client Services Agreement with every client from whom they open a case.

The DRC shall initially identify if clients seeking disability benefits counseling meet general criteria for case acceptance and referral to the Disability Benefit Specialist. The DRC will determine if the client falls within the target population of the DRC and whether the issues identified fall within the Disability Benefit Specialist Scope of Services. Before referring to a DBS, the DRC will also consider the factors outlined in the Disability Benefit Specialist Program Policies and Procedures. Before accepting a case the DBS will also consider the factors outlined in the Disability Benefit Specialist Program Policies and Procedures. If there is disagreement between the DRC and the agency hiring the DBSs on case acceptance, a meeting will be held to try to come to an agreement and the Program Attorney will be consulted.

Case closures and termination for DBS services must follow the guidelines in the Disability Benefit Specialist Program Policies and Procedures.

PROPOSAL CONTENT MUST ADDRESS:

1. Staffing issues:
 - a. The number (FTEs) of Disability Benefit Specialists (DBSs) who will provide disability benefit counseling, the number (FTEs) of supervisors and any other support staff (describe their role and function).
 - b. Qualifications for all positions.
 - c. The qualifications, including education and relevant experience, of any existing staff who will be Disability Benefit Specialists.
 - d. Hiring process for DBSs and supervisors.
 - e. Initial and ongoing training of DBSs, and any supervisors and support staff.
 - f. Process for ensuring that the entire DBS team is located on-site at the DRC during the DRC's regularly scheduled working hours.
 - g. Process for filing vacancies which would include working with the DRC, DHS and program attorneys and which must address management of existing caseload, ongoing correspondence and new DBS contacts.
 - h. Describe how conflict of interest will be avoided.
2. Staff supervision:
 - a. Describe how the daily job performance of DBSs will be supervised to ensure that the Disability Benefit Specialist Program Policies and Procedures are followed and the Scope of Services addressed. Describe specifically how DBS attendance, 100% time reporting and productivity and prioritization of non-case-specific functions will be monitored.
 - b. Provide an organizational structure for the reporting relationships among supervisors, DBSs and any support staff.
 - c. Describe the process for co-guidance from the Program Attorney regarding caseload management.
 - d. Describe process for evaluating employee performance, including soliciting input from the DRC and Program Attorneys.
3. Service issues:
 - a. Describe how the mandatory Core Services identified in the DHS Disability Benefit Specialist (DBS) Program Services Scope of Services (August 2008 or as updated by DHS) will be provided.
 - b. Describe how compliance with the DHS Disability Benefit Specialist Program Policies and Procedures will be achieved.
 - c. Describe how confidentiality of clients will be maintained in compliance with the DHS Disability Benefit Specialist Program Policies and Procedures.
 - d. Describe the process that will be used to determine case acceptance and case closure and termination procedures.
 - e. Describe the process for using the Client Services Agreement in compliance with the DHS Disability Benefit Specialist Program Policies and Procedures.

- f. Describe the interface with the DRC in term of assuring people referred to the DBSs are served in a quality and timely manner.
 - g. Describe the process for ensuring the timely maintenance and delivery of the DBS database to DHS.
 - h. Describe the agency's capability to use the MIDAS management information system and the monitoring of DBS use of the State DBS database system for reporting and documenting the provision of services to clients.
 - i. Describe the process for insuring use of the Client Services Agreement for each client served.
 - j. Describe any plans for providing outreach regarding the Disability Benefit Specialist Program and provide sample of proposed materials which would be used.
 - k. Describe how the agency will address client accessibility (physical and language), cultural sensitivity, and serving individuals with cognitive impairments.
4. Outcomes
- a. Describe clearly the outcomes measures which will be used to demonstrate that people referred were assisted in obtaining or retaining public or private benefits.
 - b. Describe the process for ensuring outcomes are achieved, including how information will be collected, reviewed and communicated back internally to improve outcomes.

Non-Billable Activities

Services that are not included in the mandatory Core Services identified in the DHS DBS Program Services Scope of Services (August 2008 or as updated by DHS) are not billable unless preapproved by the DRC Manager.

Required Documentation

Copies of the state required client reporting forms will be provided to the Resource Center Manager on a monthly basis.

A quarterly evaluation report addressing the program outcomes will be provided to DHHS Contract Administration and the DRC Resource Center Manager.

Billings shall be submitted monthly in electronic format.

Expected Outputs and Outcomes, Indicators and Levels of Outcome Achievement**Disability Benefit Specialists**

1. Of the clients referred to the DBSs, 90% will express satisfaction with the program's services in an annual client satisfaction survey administered by the DRC.
2. All DBSs will comply with DHS MA Administration 100% time reporting for all Disability Benefit Specialist services provided to clients.
3. People referred to a DBS will be contacted by the DBS within three (3) business days to address their questions or make an appointment for a face-to-face visit.
4. Copies of the state required client reporting forms will be provided to the Resource Center Manager on a monthly basis.
5. Documentation will be provided to show that the DBSs participated in all trainings required in the ADRC contract and Disability Benefit Specialist Program Policies and Procedures.
6. Documentation will be provided to show that the DBSs participated in required DRC trainings and staff meetings.
7. Documentation will be provided to demonstrate completion of outreach activities as agreed to by the DRC and agency hiring the DBSs.
8. Documentation will be provided to demonstrate achievement of outcome goals as developed by the agency hiring the DBSs and agreed to by the DRC.
9. Documentation will be provided to demonstrate that the DBS positions are filled with effective, customer-driven individuals who are motivated, dependable and flexible to meet the needs of the DRC.
10. Documentation will be provided to demonstrate that the DBSs address the Disability Benefit Specialist Scope of Services and the Disability Benefit Specialist Program Policies and Procedures.
11. A quarterly evaluation report addressing the outcomes above will be provided to DHHS Contract Administration and the DRC Resource Center Manager.

Units

Units of service for this program shall be reported in quarter-hours.

Additional Information

In developing a proposal to provide DBS services, respondents should consult the following documents available on the RFP distribution CD, or online at:

<http://county.milwaukee.org/ContractMgt15483.htm>

Scope of Services, August, 2008, Client Services Agreement, DBS Policy & Procedure Manual.