

**Effective Date: October 16, 1994**  
**Modified Effective: May 30, 2004**  
**Modified Effective: August 9, 2015**  
**Modified Effective: May 15, 2016**  
**Modified Effective: January 21, 2018**

**STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION**

**AGING AND LONG TERM CARE-LEAD**

**I. INTRODUCTION**

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future professional positions located within the Board on Aging and Long Term Care. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area. Classification decisions must be based on the “best fit” of the duties within the existing classification structure. The “best fit” is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification encompasses three positions located within the Board on Aging and Long Term Care. One position provides information and referral services to the consumers of insurance for the elderly and persons with disabilities through operation of a telephone helpline. The second insures advocacy services for older adult consumers living in State of Wisconsin licensed long term care settings and members of the state’s managed long term care programs. The third provides direct client advocacy to IRIS (Include, Respect, I Self-Direct) program participants, as well as technical assistance to IRIS Ombudsman staff, ensuring the timely and accurate response to complaints, questions, concerns or suggestions brought forth by consumers of self-directed managed long term care services. The positions allocated to this classification serve as lead workers to Medigap Insurance Specialist or Ombudsman Services Specialist positions.

C. Exclusions

Excluded from this classification are the following types of positions:

1. Positions that meet the statutory definitions of supervisor and/or management as defined in ss. 111.81(19) and (13), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions located outside the Board on Aging and Long Term Care.
3. Positions that provide health insurance counseling and information to Medicare-eligible citizens a majority of the time (more than 50%) but are not assigned the lead worker responsibility and are more appropriately classified as Medigap Insurance Specialist.
4. Positions that provide professional counseling services in the areas of vocational rehabilitation, social work, psychology, or other human services specializations a majority of the time (more than 50%).
5. Positions that provide ombudsman and advocacy services to individuals residing in long term care facilities and their families a majority of the time (more than 50%) but are not assigned the leadworker responsibility and are more appropriately classified as Ombudsman Services Specialist.
6. All other positions that are more appropriately identified by other classification specifications.

D. Entrance Into This Classification

Employees enter this classification by competition.

## II. DEFINITIONS

### AGING AND LONG TERM CARE - LEAD

Positions must meet one of the following allocations:

1) This position provides health insurance counseling and information to Medicare-eligible citizens and their representatives and refers consumer complaints to the Commissioner of Insurance or to the Centers for Medicare and Medicaid Services. This position provides direct counseling by telephone, written and electronic correspondence and/or in person to consumers regarding enrollment into Medicare, private Medicare health plans, or Medicare Prescription Drug options, purchase or replacement of Medicare supplemental health insurance, hospital indemnity, health maintenance organization, long-term care, nursing home, home health care, and other insurance products marketed to the elderly or to persons with disabilities. This position is responsible for providing training to other professional agencies and consumer groups; and developing informational materials for public dissemination. Additionally, this position provides technical assistance and materials to employees of local, regional, and statewide aging network providers and provides technical support and guidance to Medigap Insurance Specialist positions. This position recruits, trains and monitors the activities of Medigap Volunteers who assist the Medigap Helpline Services programs. This position serves as liaison to other departments of state government regarding insurance concerns of elderly persons and persons with disabilities.

2) This position provides technical assistance, support and guidance to Ombudsman Services Specialist positions, and serves as the Ombudsman Program Lead for assigned advocacy-based projects, networks and workgroups. This position may also provide ombudsman services for an assigned region of the state when covering Ombudsman Services Specialists vacancies, conducting professional investigations of complaints related to the rights and treatment of individuals sixty (60) years of age and older residing in or receiving services from or under the management of the following licensed or certified entities: skilled nursing homes, community-based residential facilities, residential care apartment complexes, adult family homes, managed care organizations, swing-bed facilities and hospices. This position provides support to clients at hearings and appeals relating to the provision of long term care services and will identify trends and deficiencies in the long term care system through data monitoring of complaint investigations and consultations, and work with governmental and non-governmental agencies involved in the provision of long term care services.

3) This position provides IRIS ombudsmen counseling and information relating to complaint resolution in managed long term care programs generally (Family Care, PACE, Partnership), and the IRIS program specifically. The position leads IRIS ombudsmen with client-based casework, including advising about and assisting as necessary with all tasks related to informal client conferences and state fair hearings. This position coordinates necessary training and continuing education for IRIS ombudsman staff, including the provision of new staff orientation and mentoring new IRIS ombudsmen while assisting in developing updated training materials. This position represents the interest of clients before governmental agencies and seek administrative, legal and other remedies to protect the health, safety, welfare and rights of clients. Finally, it reviews all documents and data relating to complaints including records held by social service agencies, compliance records held by Department of Health Services (DHS), Office of Caregiver Quality (OCQ), Department of Regulation and Licensing, Office of Commissioner of Insurance (OCI), Department of Justice (DOJ) and other appropriate agencies.

### **III. QUALIFICATIONS**

The qualifications required for this position will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

### **IV. ADMINISTRATIVE INFORMATION**

This classification was originally created as a result of a Personnel Management Survey, effective October 16, 1994, and announced in Bulletin No. CC/SC-28, as part of the Medigap Insurance Specialist series. This classification was modified, effective May 30, 2004, and announced in Bulletin OSER-0032-MRS-SC, to distinguish the "Lead" level from the "A, B" series that was set up for pay progression negotiated in the 2003 – 2005 collective bargaining agreement between the State of Wisconsin and the Wisconsin State Employees Union.

The specification was revised effective August 9, 2015 and announced in Bulletin DPM-0404-CC/SC to reflect the updating of the language and the broadbanding of the classification.

This specification was modified effective May 15, 2016 and announced in Bulletin DPM-0423-CC/SC and the classification specification title was changed from Medigap Insurance Specialist-Lead to Aging and Long Term Care-Lead to better reflect the use of this classification in multiple program areas. At the

same time, an allocation for a lead-worker position that insures the provision of advocacy services to individuals residing in licensed and certified long term care facilities or who receive their home and community-based services through the Family Care/PACE/Partnership Programs or the Community Options Program for the other program area.

This specification was modified effective January 21, 2018 and announced in Bulletin DPM-0458-CC/SC. This modification added the third allocation of IRIS Ombudsman Lead to the specification due to statutory program changes.

ILW  
KMC  
TK/CMD  
SH/CD  
SH/SPU  
51903