

- Availability of protection and advocacy services for beneficiaries with disabilities and how to access such services.

**Note:** The technical assistance and training contractor may provide technical assistance materials to enable project Benefits Specialists to get information about the subjects in the preceding paragraphs. However, each awardee shall be responsible for ensuring that Benefits Specialists are well-versed in these areas.

Applicants must describe any plans they have to collaborate or coordinate with public and private organizations to achieve and/or improve their project goals and submit evidence to SSA of these organizations' capabilities, and willingness to participate (*e.g.*, letters of intent, memoranda of understanding). Applicants should not request letters of intent or commitment from SSA field offices. SSA will assure field office cooperation.

Each applicant must describe the number of beneficiaries with disabilities it expects to serve. SSA records indicate there are approximately 11,500 beneficiaries in Wyoming.

**Note:** All SSDI and SSI beneficiaries (including SSI recipients as young as age 14) within the geographic area served by the project, must be able to access benefits planning, assistance, and outreach via the project.

The project may be part of a larger State initiative; *e.g.*, a DOL One-Stop Career Center, that serves other individuals with disabilities, such as TANF recipients; however, funds provided by SSA under the cooperative agreements cannot be used to serve people with disabilities who are not beneficiaries of SSDI and/or SSI.

### C. Benefits Specialist Responsibilities and Competencies

#### 1. Responsibilities

The cooperative agreement awardee shall select individuals who will act as Benefits Specialists. Benefits Specialists will provide work incentives planning and assistance directly to beneficiaries with disabilities; conduct outreach efforts to beneficiaries with disabilities (and their families), who are potentially eligible to participate in Federal or State work incentives programs designed to assist disabled beneficiaries to work; and work in cooperation with Federal, State, and private agencies and nonprofit organizations that serve beneficiaries with disabilities. Benefits Specialists will also provide information on the adequacy of health benefits coverage that may be offered by an employer of a beneficiary with a disability; the extent to which other

health benefits coverage may be available to that beneficiary; and the availability of protection and advocacy services for beneficiaries with disabilities, and how to access such services.

**Benefits Planning.** Benefits planning requires an in-depth understanding of the current status of a beneficiary being served. Initial benefits planning will support a beneficiary over a period of several weeks to several months, concluding when the beneficiary has received guidance to support informed choices. Benefits Specialists will establish plans for beneficiaries with disabilities, and develop long-term supports that may be needed to ensure success. Following the initial benefits planning process, they will provide periodic, follow-up planning services to ensure that the information, analysis, and guidance are updated as new conditions (with regard to the applicable programs or to the individual's situation) arise.

To provide benefits planning services, Benefits Specialists will:

- Obtain and evaluate comprehensive information about a beneficiary with a disability on the following:
  - Beneficiary background information,
  - Disability,
  - Employment and earnings,
  - Resources,
  - Federal and State benefits,
  - Health insurance,
  - Work expenses,
  - Work incentives, and
  - Service(s) and supports;
- Assess the potential impacts of employment and/or other changes on a beneficiary's Federal and State benefits eligibility and overall financial well-being;

- Provide information and assist the beneficiary in understanding and assessing the potential impacts of employment and/or other actions or changes on his/her life situation, and provide specific guidance regarding the affects of various work incentives;

- Develop a comprehensive framework of possible options available to a beneficiary and projected results for each as part of the career development and employment process; and
- Ensure confidentiality of all information provided.

**Benefits Assistance.** Benefits assistance involves the delivery of information and direct supports for the purpose of assisting a beneficiary in dealing with benefit issues and effectively managing benefits. Benefits assistance also involves providing information and referral and problem-solving services as needed. Benefits

management services will generally build on previous planning and assistance services and include periodic updates of an individual's specific information, reassessment of benefit(s) and overall impacts, education and advisement, and additional planning for monitoring and managing benefits and work incentives.

To provide benefits assistance services, Benefits Specialists will:

- Provide time-limited direct assistance to a beneficiary in the development of a comprehensive, long-term benefits management plan to guide the effective monitoring and management of Federal and State benefits and work incentives. Specific components of the plan must address:
  - Desired benefit and work outcomes,
  - Related steps or activities necessary to achieve outcomes,
  - Associated dates or time frames,
  - Building on initial benefits planning efforts including information gathering, analysis and advisement, and
- Benefits/financial analysis (pre- and post-employment);
- Provide time-limited, intensive assistance to beneficiaries, their key stakeholders, and their support teams in making informed choices and establishing both employment-related goals as well as needed benefits management supports. Needed benefits assistance could include:
  - How SSDI and SSI work incentives programs may lead to self-supporting employment by developing a PASS,
  - Developing a PASS which can be used to obtain training, education, and entrepreneurial opportunities,
  - How a PASS can be used to address some of the barriers to employment, such as obtaining a car for transportation needs, and
  - The 1619(b) provisions and requirements;
- Advocate on behalf of a beneficiary with other agencies and programs, which requires in-person, telephone and/or written communication with the individual and other involved parties generally over a period of several weeks to several months;
- Provide time-limited follow-up assistance as needed to beneficiaries who have previously received benefits planning and /or other types of benefits assistance services and:
  - Assist them and other involved parties to update information,
  - Reassess impact of employment and other changes on benefits and work incentives, and
  - Provide additional guidance on benefit options, issues and management strategies;