

- Assist beneficiaries as needed to update benefits management plan;
- Provide information, referral, and problem-solving support;
- Provide ongoing, comprehensive, benefits monitoring and management assistance to beneficiaries who are likely to experience employment, benefits, or other changes that may dramatically affect their benefit(s) status, health care, or overall financial well being; and
- Provide long-term benefits management on a scheduled, continuous basis, allowing for the planning and provision of supports at regular checkpoints, as well as critical transition points in an individual's benefits, employment and overall situation.

Outreach. Outreach activities are ongoing, systematic efforts to inform individuals of available work incentives, as well as the services and supports available to enable them to access and benefit from those work incentives. Outreach efforts should be targeted directly to SSDI and SSI beneficiaries with disabilities, their families, and to advocacy groups and service provider agencies that have regular contact with them. Outreach activities should be directed toward and sensitive to the needs of individuals from diverse ethnic backgrounds, persons with English as their second language, as well as non-English speaking persons, individuals residing in highly urban or rural areas, and other traditionally underserved groups.

To conduct ongoing outreach, Benefits Specialists will:

- Prepare and disseminate information explaining Federal or State work incentives programs and their interrelationships; and
- Work in cooperation with other Federal, State, and private agencies and nonprofit organizations that serve beneficiaries with disabilities, and with agencies and organizations that focus on vocational rehabilitation and work-related training and counseling.

The Benefits Specialists will conduct outreach to SSDI and SSI beneficiaries with disabilities (and their families), who are potentially eligible to participate in Federal or State work incentives programs that are designed to assist beneficiaries with disabilities to work.

2. Competencies

Applicants must ensure that Benefits Specialists have the skills required to competently provide benefits planning and assistance services, and outreach. We prefer that cooperative agreement awardees use Benefits Specialists who

have attained a bachelor's degree in a relevant field, or that they use Benefit Specialists with relevant experience. Benefit Specialists may possess a combination of education and experience if the experience provides the knowledge, skills and abilities to perform successfully the duties of the position.

Benefits Specialists should bring the following knowledge, skills, and abilities to the position:

- Basic math skills, with an emphasis on problem solving;
- Deductive ability with analytical thinking and creative problem solving skills;
- Acceptable interviewing skills;
- Ability to interpret Federal laws, regulations, and administrative code about public benefits;
- Communication skills (written and/or verbal);
- Knowledge of medical terminology and awareness of cultural and political issues pertaining to various populations and to various disabilities; and
- Basic computer skills.

Benefits Specialists will need to become proficient in the following knowledge, skills, and abilities:

- SSDI and SSI disability programs;
- Knowledge of all public benefits programs, including operations and inter-relationships;
- Translating technical information for lay individuals;
- Accessing information in a variety of ways (including the ability to be able to recognize when additional information is needed);
- Interpersonal skills (*e.g.*, recognize and help people manage anger and conflict, enjoy working with individuals);
- Counseling skills (ability to listen, evaluate alternatives, advise on potential cause of action);
- Knowledge of SSA field office structure and how to work with various work incentives coordinators (*e.g.*, PASS specialists, employment support representatives);
- Knowledge of the structure and design of public and private benefits systems and local community services; and
- Knowledge of ethics (*e.g.*, confidentiality, conflict of interest).

The applicant must clearly explain how it will ensure all individuals hired as Benefits Specialists will possess or acquire the relevant knowledge, skills and abilities. SSA has contracted with separate entities to provide technical assistance and training to cooperative agreement awardees on an ongoing basis about SSA's programs and work incentives, Medicare and Medicaid, and

other Federal work incentives programs. Those entities are: Cornell University for SSA Regions I, II and V; Virginia Commonwealth University for Regions III, IV, VI, and IX; and the University of Missouri, Columbia for Regions VII, VIII (including Wyoming), and X. The applicant is responsible for providing technical assistance and training to Benefits Specialists about State and local programs.

D. Management Information and Reporting

In addition to cooperating with the surveys outlined in Part I, Section D, entities must provide all collected data and report the results to SSA's Office of Acquisition and Grants, as described below.

Common data elements, as defined by SSA, will be collected through a data base designed and managed by VCU. The awardee and SSA will use the management information (MI) data to manage the project and to determine what additional resources or other approaches may be needed to improve the process. The data will also be valuable to SSA in its analysis of and future planning for the SSDI and SSI programs.

The Wyoming project must adhere to SSA's Privacy and Confidentiality Regulations (20 CFR part 401) for maintaining records of individuals, as well as provide specific safeguards surrounding beneficiary information sharing, paper/computer records/data, and other issues potentially arising from providing benefits planning, assistance, and outreach to SSDI and SSI beneficiaries with disabilities. Personal beneficiary data should be accessible only to project personnel by way of locked file cabinets, computer password protections, *etc.*

The Wyoming project shall collect specific data elements on their counselors and all SSA beneficiaries/recipients who receive BPAO services from the project. This data shall be entered by the project into the online BPAO National Data Entry System (see <http://www.vcu-barc.org/data.html> for additional information). For the purpose of providing MI to SSA in support of the implementation and management of the project, the project will collect, analyze, and summarize the data listed below:

Beneficiary Background Information

1. Beneficiary/recipient name (Last, First, Middle).
2. Date of birth.
3. Gender.
4. Special language or other considerations.
5. Mailing address.