



Cornell University
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Employment and Disability Institute

Work Incentive Support Center

HR Series

Staffing and Managing Benefits Planning, Assistance, and Outreach Programs

Tips for Coordinators and Managers

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This publication was authored by Mary Ridgely, Executive Director of Employment Resources, Inc. in Madison Wisconsin and Barb Smith, Director of the Minnesota Work Incentives Connection in St. Paul, Minnesota. The materials are provided solely as information guidance and are neither a determination of legal rights or responsibilities, nor binding on any agency. This resource is dedicated to increasing the knowledge and understanding of practitioners as they pursue effective ways for expanding the delivery of quality benefits planning and assistance services and supports across the United States.

Table of Contents

Table of Contents	ii
Forward	iii
Introduction	1
Staff Recruitment	2
The Characteristics of a Good Benefits Specialist.....	2
A “pathological need to know”	2
Persistence.....	3
Analytical mind.....	3
“Bitten” by the benefits bug.....	3
Good at Math	3
Knows what they don't know	3
Aptitude to develop technical writing skills	4
Attention to detail	4
Positive attitude.....	4
Finding Qualified Applicants.....	5
Selecting the Right Person	5
Initial Screening	5
Interviewing	7
Salary	8
Job Description	8
Training the Benefits Specialist or Planner	10
Training Resources	10
Print Resources of Benefits Specialists and Planners	11
Other Staff Development Approaches	12
Case Reviews	12
Case Study	12
On-the-Job Training.....	12
Using a Mentor	13
Staff In-Services Training.....	14
Tools for the Manager.....	14
Conducting Effective Meetings	14
Reviewing Individual Performance	15
Caseload and Scheduling Strategies	16
Supervision and Support.....	16

Appendix A - Resume Screening Tool

Appendix B1 - Work Incentives Programs and Scenarios: Benefits Specialist Position

Appendix B2 - Work Incentives Programs and Scenarios: Benefits Specialist Position

Appendix C1 - Benefits Counseling and Analysis Survey

Appendix C2 - Satisfaction Survey

Appendix D - Benefits Planning and Assistance Sample Services Tracking Form

Forward

The Need for a Human Resources Toolkit

The Work Incentives Support Center at Cornell University's Program on Employment and Disability in the School of Industrial and Labor Relations conducted a human resources survey of the 35 Benefits Planning, Assistance and Outreach (BPA&O) and 16 Protection and Advocacy for Beneficiaries of Social Security (PABSS) Projects located in federal regions I, II and V¹ during July of 2002. Approximately 82% (n= 29 of 32) of the BPA&O projects and approximately 62% (n=10 of 16) of PABSS projects responded to the survey. An initial query for participation was conducted along with, on average, three follow-up requests for participation by Training and Organizational Development Specialists employed by Cornell University. Queries were directly with Project Directors (or Coordinators) and primarily conducted via e-mail and phone and potential respondents were apprised that participation in the survey was voluntary and not required as part of their Cooperative Agreements with the Social Security Administration (SSA). However, projects were encouraged to participate as results stemming from the survey could assist in better meeting the human resource development needs of personnel employed within BPA&O and PABSS projects and assist Cornell University in developing further informational resources to effect more positive human resources practices.

While this resource "Staffing and Managing Benefits Planning, Assistance and Outreach Programs," is targeted to BPA&O project managers, a comparison and contrast of human resources procedures and practices with the PABSS initiatives in Region I, II and V is provided below to aid in identifying where positive practices exist.

Staffing Patterns

Of those responding to the survey, BPA&O projects reported averaging 4.8 staff allocated to their individual projects as compared to statewide PABSS projects that reported 3.2 personnel². Directors in BPA&O projects reported a majority of their personnel being allocated full-time to their project with 38.1% part-time compared to 61.9% allocated full-time. Directors of PABSS Projects reported a more equitable split in part-time and full-time allocations with 52% and 48% respectively. Most disturbing were turnover rates reported by BPA&O projects when compared to that of PABSS projects. Initial data documented that BPA&O Projects were four times more likely to experience turnover when compared to PABSS Projects with BPA&O Projects reporting an average turnover rate of 30.7% compared to PABSS Projects at 8.3%. Further analysis of turnover is discussed later in this report.

¹ States include: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Puerto Rico, the U.S. Virgin Islands, Ohio, Indiana, Illinois, Wisconsin, Michigan, and Minnesota.

² Note that staffing ratios reported do not include all projects as some chose to not respond to the survey and their staffing patterns are not calculated into these averages.

BPA&O respondents reported on average that 52.4% of their staff operate off-site compared to 37.2% of PABSS personnel. Further, BPA&O respondents reported that 23.3% of their staff operate without management support while 20% of PABSS respondents operate without management support. This high portion of staff operating off-site and without management support could be a result of sub-contractual relationships established to spread services over a larger geographic area.

Benefit Packages

Table I illustrates the breadth and diversity of average salary packages for BPA&O personnel and variances by state and region. The table incorporates the number of responses by state to this survey item.

Table I: Average Salary Packages for BPA&O Personnel by State		
State	No. of Respondents	Average Annual Salary
Vermont	1	\$24,570
Rhode Island	1	\$24,000
Maine	1	\$33,400
Massachusetts	2	\$38,750
Connecticut	1	\$44,300
Average Salary for Region I		\$33,004
New York	5	\$28,550
New Jersey	1	\$28,000
Puerto Rico	No report	No report
Virgin Islands	No report	No report
Average Salary for Region II		\$28,275
Wisconsin	3	\$31,100
Ohio	5	\$28,800
Minnesota	1	\$37,500
Michigan	4	\$34,667
Indiana	2	\$29,000
Illinois	2	\$36,250
Average Salary for Region V		\$32,886

Most interesting is the variance in salary scales for similar positions with the lowest average annual salary being \$24,000 and the highest being \$44,300. Reasons for this variance could be several fold including: higher costs of living in some states; type of agency administering the project (e.g. not-for-profits may pay less than a state agency); educational requirements for the job based on agency standards; and, other variables. A more comprehensive survey and in-depth analysis of the preliminary data is required to determine these variables and impact if any on potential turnover within project.

Table II illustrates the breadth and diversity of average salary packages for PABSS personnel and variances by state and region. The table incorporates the number of responses by state to this survey item.

Staffing and Managing a BPA&O Program

State	No. of Respondents	Average Annual Salary
Vermont	Missing data	Missing data
Rhode Island	No report	No report
Maine	1	\$28,400
Massachusetts	No report	No report
Connecticut	Missing data	Missing data
Average Salary for Region I		\$28,400
New York	No report	\$35,000
New Jersey	No report	\$49,000
Puerto Rico	No report	Missing data
Virgin Islands	No report	No report
Average Salary for Region II		\$42,000
Wisconsin	No report	No report
Ohio	1	\$61,000
Minnesota	No report	No report
Michigan	1	\$33,000
Indiana	1	\$28,000
Illinois	1	\$45,000
Average Salary for Region V		\$41,750

Interesting here as well is the variance in the average salary by state ranging from \$28,00 to \$61,000. As with the BPA&O projects many variables could contribute to this including, but not limited to: higher costs of living in some states; type of agency administering the project (e.g. state agency v. local agencies); skill and educational level of personnel (e.g. lawyers v. advocates); and, other variables. A more comprehensive survey and in-depth analysis of the preliminary data is required to determine these variables and impact if any on potential turnover within project.

Respondents were also asked to share typical benefits package offered to personnel employed in BPA&O and PABSS Projects. On average BPA&O personnel received 11.5 days of vacation, 10 holidays, 2.8 personal days, 10.5 days of sick leave, life insurance, retirement, long-term disability, medical insurance and dental insurance (family coverage was typically not paid for and required employee contribution). On average PABSS personnel experienced a slightly better benefits package with respondents reporting on average: 13.2 days of vacation, 11 holidays, 3 personal days, 10 days of sick leave, medical insurance (family coverage was typically not paid for and required employee contribution), dental insurance, retirement, and long-term disability. Some agencies did provide for other options such as short-term disability, pensions and other retirement options.

Staff Turnover and Need for More Effective Human Resources Practices

Over the first two years of operation of both BPA&O and PABSS Projects, Regional Training Centers providing training and technical support have noted relatively high turnover rates amongst project personnel. One of the items on the survey asked respondents to share what they felt was the reason for turnover and how to minimize this within their projects. 59% of BPA&O projects responding stated the primary reason for high turnover was associated with a poor job match followed closely by 41% associating turnover with low wages. Additional reasons included: lack of and limited medical coverage; poor benefit packages; low skill level and poor performance of personnel, uncertainty of ongoing funding and job longevity; and other personal development issues

such as relocation, job advancement, and postsecondary education pursuits. Other reasons included personnel not understanding certain features of the job such as travel and outreach. While turnover was significantly lower in PABSS Projects, a few projects did state that there was limited advancement opportunities and low career opportunities.

Coordinators and Directors of BPA&O and PABSS Programs continue to play a pivotal role in the evolution of these two emerging fields. This resource, *Staffing and Managing Benefits Planning, Assistance and Outreach Programs: Tips for Coordinators and Managers* is but the first in a series of tools that will be developed to assist project managers in streamlining and enhancing current human resources practices to continue the healthy growth of the BPA&O field and provide project managers the essential tools and strategies they need to obtain, maintain and advance effective benefits practitioners.

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Introduction

In the early 90's the number of people whose primary purpose was to analyze the effect that work would have on public benefits received by people with disabilities in the United States was limited. By necessity, many professionals had a partial understanding of federal and state benefit programs and the work incentive provisions that may accompany them. However, they often learned the "hard way", when the happy success of an individual who worked in spite of a severe disability turned to disaster and heartache when his/her cash assistance and health care coverage was terminated, or when a letter arrived informing the individual of a large overpayment. This was particularly true for individuals with disabilities who received Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI)

The passage of the Ticket to Work and Work Incentives Improvement Act (Public Law 106-170) on December 17, 1999, recognized the need for benefits planning and assistance as a core employment service needed by individuals with disabilities who received SSI and/or SSDI. By the end of 2001, all states had at least one entity that received funding from the Social Security Administration to implement a Benefits Planning, Assistance and Outreach (BPA&O) program. The BPA&O system was designed to assist SSI recipients and SSDI beneficiaries in maneuvering the complex myriad of existing public benefits programs while at the same time minimizing disincentives and barriers that existed to preparing for, attaching to, advancing in or terminating employment.

This manual is designed for the coordinator and/or manager who is responsible for the recruitment, hiring, training and supervision of benefit specialists or planners within the BPA&O system or rehabilitation, special education and/or disability professionals who need to have benefits planning expertise to execute their jobs effectively.

We begin by telling a story...

A young woman was excited about her new job as a vocational rehabilitation counselor. She had just graduated from a highly accredited university, earning a degree in Vocational Rehabilitation. Her first assignment was to take an individual to the local Office of the Social Security Administration and help her fill out an application for SSI. The young woman was embarrassed to admit that she had never heard of SSI, and didn't even know what that acronym stood for. She was able to complete the application process learning about SSI as she maneuvered the process.

At the first opportunity, the young woman returned to her alma mater and marched into the office of her academic advisor. "Why didn't you tell me about the programs the Social Security Administration has for people with disabilities? Everyone I'm working with is receiving one or the other of these benefits", she exclaimed. While the advisor agreed, the response was typical, stating "there wasn't enough room in the curriculum for that topic".

This is a true story. The young woman graduated from college in 1975. Twenty-five years have passed, yet there still is no concerted effort to incorporate information about the benefits, entitlement programs, subsidies and services available to people with disabilities, and the impact that work will have on them, into our university pre-service training curriculums.

We tell this story because this manual is about recruiting and hiring benefit specialists or planners or professionals with this type of expertise, and to date, there is no required pre-service training for this very crucial role. Most benefits specialists or planners gain their expertise on-the-job, hopefully following intensive training on benefits, entitlements and work incentives taught by experienced and knowledgeable trainers. Most benefits specialists or planners will tell you that it takes *at least* a year to become independent at the job—and even then the need for ongoing human resource development is great. The administrative costs of recruiting and training a benefits specialist can be significant. Given that, a number one rule for protecting this investment is: *do whatever you can to hold onto qualified staff.*

The development of a BPA&O program or fee-for-service benefits counseling program is all about capacity building. One by one, staff are hired and nurtured as they learn the job, leading to eventually providing a high quality and comprehensive service. It is critically important to support staff in continued development of knowledge, skills, and experiences.

Staff Recruitment

The Characteristics of a Good Benefit Specialist

Individuals interested in pursuing a career as a benefits specialist or planner come with different backgrounds, each bringing their own knowledge, learning style, and approach to the job. While the backgrounds, baseline skills and personal approach to the job may vary; there are still several important characteristics of an effective benefits specialist or planner.

Regardless of their formal education, training, or life experience, a successful benefits specialist or planner will have many of the following qualities:

A “pathological need to know”

A good benefit specialist or planner has a keen sense that there is more to know about a topic other than what appears on the surface. They have an inquisitive and curious mind and are willing to thoroughly research a topic. They thrive on new challenges and seeking information and answers where they do not already exist. Some benefits specialists and planners even joke that they will not sleep until they get the final piece of the puzzle in place. Benefits Specialists and planners are typically very resourceful and will read, surf the Internet, contact experts and do whatever else it takes to find the answers they need.

Staffing and Managing a BPA&O Program

Persistence

“Leave no stone unturned” is the motto of the successful benefits specialist or planner, who will keep digging until all possible answers to a question have been exhausted. In order to do a satisfactory job, the benefits specialist or planner has to be able to ensure that information they have obtained is correct. Challenging information or people who have given the information is not an easy thing to do. The benefits specialist or planner is tenacious in their desire to learn the truth, and are the kind of person you would want on your side if you were struggling to make sense of the public benefit system. The goal of a benefits specialist or planner is to get cooperation from people in power, and to do so in a way that builds a productive and long-lasting relationship.

Analytical mind

The benefits specialist or planner has to interpret complex policy, rules, and procedures, administrative code, and legislative language into practical and understandable information. They have to see beyond the initial question and determine the questions the individual they are serving does not know to ask. The benefits specialist or planner must be able to interpret word problems, process technical information, and identify and focus on the key problem question. The benefits specialist or planner also must apply sound and consistent thinking to the decision-making process that is part of the benefits planning and assistance role.

“Bitten” by the benefits bug

The effective benefits specialist or planner approaches problems and issues not only with enthusiasm, but also with a conviction that there are answers and a determination that problems can be resolved. The individual is compassionate and understands that the system itself can be a barrier to employment for persons with disabilities. They are committed to making access to work easier for people with disabilities and are passionate about people getting information they can understand. They recognize that agencies administering benefit programs must follow their own rules. Most importantly, they believe that the individual they are serving is capable of making an informed decision with regard to work, using the information provided through a benefit analysis.

Good at math

Someone who is anxious about math is likely to have difficulty understanding benefit calculations, applying those calculations, and then drawing accurate conclusions from a series of such calculations. Math is a big part of the job.

Knows what they don't know

In this field, ignorance is bliss, but it is also VERY dangerous. Giving incorrect information to an individual seeking guidance can have devastating results, such as a large overpayment of cash benefits, an unplanned loss of cash benefits or health care. It is important that the benefits specialist or planner recognize their shortcomings and have the ability and willingness to ask for help. The benefits specialist or planner who knows *everything* necessary to do the job doesn't exist—an effective benefits specialist or planner has a confidence in their abilities but also admits there is much more they still need to learn. As a manager of benefits specialists or planners, support must be provided when they ask for help. Further, they must be supported in identifying and cultivating “expert” resources to help with complex problems or issues. In addition, managers must reinforce the importance of accuracy over speed when a benefits specialist or planner has doubts about a case they are working on.

Aptitude to develop technical writing skills

Writing requirements for a benefits specialist or planner range from accurately completing forms to clearly communicating highly technical information in a summary report. Benefits specialists or planners must be able to do the following:

- Complete data forms;
- Profile customer characteristics and circumstances;
- Write letters on several levels to several different stakeholders; and
- Produce a written summary or report of a benefits analysis.

While there are ways to assist staff with these writing tasks, it is important that the benefits specialist or planner has some experience with producing written work and is not averse to putting time into this area. Someone who indicates that they dislike paperwork, don't see it as a priority, or have never written a professional report or document, need to be carefully considered in regard to how well this individual is going to meet the expectations of the job.

Attention to detail

A successful benefits specialist or planner pays attention to details. A carefully completed analysis is one that:

1. Examines all of the benefits, entitlements, subsidies and services with income-related eligibility criteria;
2. Analyzes the impact earnings from work will have on cash assistance, health coverage, and continued eligibility.
3. Looks closely at each individual's personal circumstances and goals and will incorporate appropriate work incentives into the analysis process.

The benefits specialist or planner must blend all of these elements into the information provided to the consumer. Two people with exactly the same set of benefits, entitlements, subsidies and services will not have identical benefits analysis summaries. Look for the person who will approach every benefit analysis as a new and different challenge and every individual they serve as a person with unique circumstances.

Positive attitude

When hiring a benefits specialist or planner, look for the person who won't be deterred when things get complicated. Someone who will just complain about "the system" without looking for creative solutions is not a good candidate. Seek the action-oriented person. Philosophically, the benefits specialist or planner must believe that people with disabilities can work and should have the opportunity to pursue their employment aspirations. The successful candidate is undaunted by complicated rules and believes that it's possible to make the current system work. If the benefits specialist or planner conveys a positive outlook, it will give the individual they are serving a sense of hope. It will also create an atmosphere in which the benefits specialist or planner can work successfully with personnel from other agencies.

Finding Qualified Applicants

While traditional methods for advertising available positions, such as the newspaper or the internet (JobNet) are effective, one of the best ways to recruit a successful candidate is by word of mouth. This can be accomplished by offering an incentive to staff if they recruit an individual who is eventually hired. A manager can also look for potential candidates during workshops for community members who are assisting people with disabilities returning to work-rehabilitation counselors, vocational providers, mental health workers, etc. Some of these individuals routinely attend public benefit workshops and their attendance may show that they have a “pathological need to know,” the analytical mind, the persistence and many of the other characteristics essential in good job candidates.

Former or current SSDI beneficiaries or SSI recipients are another potential source of job candidates. Who better understands the feelings and perspectives of the consumers attempting to be served? Finally, universities can serve as an excellent source for recruitment. For example, three of the successful benefits specialists at Employment Resources, Inc. in Wisconsin spent time with the agency as interns during their final year of college. More and more students are expressing an interest in the area of benefits counseling, and a full-time intern can receive the same training as paid staff at little or no cost to the agency. An effective way to generate interest in the position is to conduct outreach to the higher education institutions in the area (e.g. give a presentation to a class at the local university or college).

The recruitment process must be accessible to all. Job postings should appear in publications, places, and agencies where potential candidates, including those with disabilities, will see them. Postings should encourage people with disabilities to apply and should be available in alternative formats. Allow adequate time for response to the job ads and for the receipt of cover letters and resumes.

Selecting the Right Person

Initial Screening

Benefits specialists or planners will come from a variety of educational backgrounds, work experience, and life experience. Those with degrees in Social Work or Vocational Rehabilitation Counseling will possess counseling skills but may lack the analytical talent, math ability, and investigative nature that the job requires. People with training in paralegal work, accounting, benefit program management (e.g. Social Security Claims Representative or Economic Support Worker) often possess the technical knowledge but may not have the counseling experience and/or ability. It is critical to strike a balance between the two.

Most employers use the job interview to choose the person for the job. The interview process will not always give you sufficient information to make a good hiring decision. At the Minnesota Work Incentives Connection, potential benefits specialist candidates are first selected based on their education, work background, experiences with people with disabilities and vocational programming; and practical knowledge of benefit systems and work incentives. Presumably, this information is provided in the cover letter and resume submitted during recruitment. Two tools for conducting a resume screening are provided in Appendix A. This tool assists the manager or interview team in attaching a score to the relevant education, skills, and job experience of a candidate and assists in prioritizing candidates for interviewing.

Since often it is difficult to judge whether or not you have a good candidate just by looking at paper, a series of screening tools can be used to determine the extent to which a candidate meets the minimal requirements of the job. The Minnesota Work Incentives Connection uses one of two screening tools to narrow down the field of candidates who will be interviewed. Copies of these tools are provided in Appendix B.

The first tool is a series of questions and requires that the candidate have good working knowledge about 1) the differences between SSI and SSDI; 2) how the SSI formula works, 3) how the Trial Work Period, the Extended Period of Eligibility and the Grace Period work and 4) how State Supplement and Medicaid programs fit into the picture. Items range from easy to difficult and include problem-solving scenarios. Performance on this tool separates those who know something from those who don't know much about the subject matter. That is all the tool does. It does not measure many of the other important characteristics identified earlier in this article that are essential in an effective benefits specialist or planner. Management at the Minnesota Work Incentives Connection believes that those who can perform adequately on this tool are potentially coming with a base of knowledge on which to build. This is advantageous when hiring a benefits specialist or planner.

The other screening tool utilized by the Minnesota Work Incentives Connection does not require specific technical knowledge. Rather, it examines the opinions, problem-solving skills and work styles of the potential candidates. This screening tool was developed when the pool of candidates clearly did not have the required technical knowledge and selection would be made based on some of the other essential characteristics of an effective benefits specialist or planner.

Employment Resources, Inc. utilizes a less formal selection process. The Benefits Program Manager, who looks for the basic life or work experiences, education, and expressed goals, reviews resumes or interests that tend to suggest a successful candidate. An interviewing team is usually comprised of the Benefits Program Manager, the Assistant Director, and at least one Benefits Specialist on staff. The team meets beforehand to develop the interview questions. All candidates interviewed are asked the same questions.

Employment Resources, Inc. "borrowed" the first tool described above from Minnesota Work Incentives Connection and modified it to reflect some of the state-specific benefit programs. The tool is not used to screen potential applicants prior to the interview process; rather, it is used during the interview process. The applicants' answers to these questions are considered along with their interview responses when making the final selection.

A manager can easily develop their own screening tool, but first the effective manager will identify what they want to learn about their candidates before actually taking the time to interview them. Questions and scenarios should target information that is important and relevant to the unique situation being hired for (e.g. technical knowledge, barriers faced by people with disabilities, biases and fears about people with disabilities, the importance of work, problem-solving skills, working with state and federal bureaucracies, future vocational plans, etc).

A screening tool can be administered to a group of candidates at one time or used during a telephone screening. In the end, the tool will help narrow the interview pool to those people who seem to possess the base knowledge, skills, opinions and attitudes being looked for in a benefits specialist or planner.

Staffing and Managing a BPA&O Program

Interviewing

The interview is an opportunity to learn enough about a candidate to make a hiring decision. There are a variety of ways to conduct interviews. Some basic rules include preparing interview questions in advance, asking open-ended questions, and listening more than speaking. Many management and interview books have examples of interview questions.

The following are some of the questions that may be used:

- Highlight the most important things you do on your current job. What has been your greatest accomplishment on this job?
- Describe problems you encounter routinely on your current job, and how you handle them.
- What have you done/what do you do on your job to contribute to a positive working environment?
- Why are you interested in changing jobs right now?
- Why are you interested in being a Benefits Specialist?
- What relevant skills and experience do you bring to the position?
- In what areas do you think you will need assistance and more training?
- What is the best way for you to learn new information?
- What values and viewpoints do you have regarding people with disabilities?
- How does your comfort level change when you work with people with differing disabilities?
- In your opinion, what percentage of people with disabilities can work?
- What is the most important thing you know about the benefits system or work incentives?
- Do you prefer to work with a certain type of person? How do you ensure good service to the individual with whom you can't develop a rapport?
- How do you establish rapport with a new client?
- On which of your jobs have you had good supervision? Describe that supervision/supervisor.
- In this job, you will need to interact with a variety of individuals from different government agencies who may not share your beliefs. How will you establish rapport with this type of person? What techniques will you use to get the information you need to do your job?
- How do you typically handle stress and frustration?
- How do you organize your work when you have multiple priorities and deadlines? How do you ensure that all necessary tasks are completed?
- Describe the kinds of written reports you have had to produce in your previous jobs.
- Tell us about your word processing skills and experience.
- Where do you hope to be, professionally, three years from now?
- Is there anything you would like to tell us about yourself?

Again, think about developing customized interview questions based on agency needs and logistical considerations, as well as on the personality, strengths and needs of existing staff. Pay close attention to the questions asked by the candidates; they may tell the interviewer what is important to this person and how much they understand about the job. Take the time to interview candidates thoroughly. It's the best chance for identifying and hiring the right person for the job!

The screening and interview processes must be accessible to all potential candidates. The building and offices where screening or interviewing is taking place must be accessible. Hallways must be wide enough, tabletops should be adjustable and bathrooms accessible. Candidates must be allowed to request, in advance, any reasonable accommodations they require in order to complete the screening tool

or to participate in the interview process. Accommodations may include providing information in alternative formats, having interpreters or readers available, and allowing more time to complete written exercises.

Salary

The benefits specialist or planner plays a crucial role in the employment planning process for an individual who relies on multiple benefits, cash assistance programs and subsidies for their financial support. While the position does not necessarily require a higher education degree, it does require aptitude in several different areas. Analytical thinking, ability to understand technical material, good written and verbal communication skills, counseling skills, presentation skills, and good math ability are some of the prerequisite skills needed. This is not an entry-level job. A good candidate will have received training and/or had experience in the above-mentioned areas, and should only need to study and learn the content of public benefit programs. Because the position calls for constant updating of the individual's knowledge, the benefits specialist or planner should be the type of person who can learn through a variety of methods (e.g. reading, seminars, videos, and should be independent at seeking this knowledge).

The salary should be commensurate with the requirements of the job. A survey of six states (Iowa, Maryland, Minnesota, Oregon, Vermont, and Wisconsin) with benefits planning programs that have been in place for three years or more indicates that the average annual salary range for benefits specialists is \$25,964 to \$40,622. The highest salary reported by those was \$49,966, while the lowest salary was \$19,857. It should be noted that positions attached to state governments tend to pay higher than those in private, non-profit agencies. The higher paid individuals also had a significant amount of direct or related experience.

Job Description

The content of the job description will vary depending on the state or territory, but the primary responsibility of the benefits specialist or planner is to analyze the benefits, entitlement, subsidies, and services of a particular individual to determine the impact that work will have on eligibility for the programs, the level of cash payment, and their overall financial situation.

The benefits specialist or planner is also responsible for educating individuals with disabilities about the appropriate work incentives available through the Social Security Administration, the State Medicaid agency, and County Human Service agencies, and to provide assistance in accessing these work incentives.

The job description should outline the time period over which the service is provided, the type of reports that are written, and the expectations regarding contact with beneficiaries and recipients. Training requirements, certification, and supervisory monitoring should be included in this document as well.

All benefits specialists or planners are not created equal even if they share a similar job description. Often benefits specialists or planner conduct their work using a specialist approach in order to fully utilize their unique skills and ensure that all the necessary work gets done. For example, at the Minnesota Work Incentives Connection, some benefits specialists focus exclusively on conducting

Staffing and Managing a BPA&O Program

outreach and handling simple questions from consumers and other concerned parties. Other specialists perform these same tasks but also handle complicated questions, technical work, and benefit analyses. Another approach to staffing is what is known as a generalist model. Neighborhood Legal Services of Buffalo uses this approach in which benefits specialists conduct all aspects of the job referenced above. At another level are benefits specialists who, in addition to the tasks already mentioned, also serve as trainers on benefits and work incentives as well as mentors for new specialists. At Employment Resources Inc in Wisconsin, experienced benefits specialists become trainers and provide technical assistance to newly hired individuals. The experienced person will also mentor new benefits specialists or planners, provide guidance during their first consumer interview and benefits analysis, and review the initial reports that are developed.

Typically a manager will not get all the skills, personality characteristics, and aptitude desired neatly packaged in each specialist hired. It is necessary to be creative and make the job fit the skills, abilities and interests of staff hired. A manager can still expect each person to fulfill the requirements of the job over time, but the manager must start out with realistic expectations. Opportunities, resources, and the challenges to ensure that all of specialists develop the skills necessary to provide a high quality service at all times must be provided.

Training the Benefits Specialist or Planner

Training Resources

There are a variety training resources around the country and any agency hiring a benefits specialist or planner should be aware of them. However, access to training and supports provided by these entities may be limited. They include:

- Cornell University's Program on Employment and Disability in the School of Industrial and Labor Relations has served as a national work incentives training and materials development center since the early 90's. They are funded through various federal and state grants and contracts and have a variety of print and video materials available, as well as online training resources available at: <http://www.ilr.cornell.edu/ped>

The contact person is Thomas P. Golden, Program on Employment and Disability, Cornell University, 105 ILR Extension Building, Ithaca, New York 14853-2763. The phone number is 607-255-7727 (voice) or 607-255-2891 (TTY). Their web site is <http://www.ilr.cornell.edu/ped/>

Available now to the general public is the training curriculum developed for the Benefits Planning, Assistance and Outreach projects made possible by the Ticket to Work and Work Incentives Improvement Act of 1999. Cornell University convened a National Materials Development Workgroup through the development of this curriculum, funded through a contract with the Social Security Administration. This curriculum can be downloaded from their web site at http://www.ilr.cornell.edu/ped/ssa_curriculum

- The Social Security Administration currently has three universities under contract to provide core training and technical support to the 117 BPA&O and states and territories providing PABSS services and supports. These include the Benefits Assistance Resource Center at Virginia Commonwealth University (<http://www.vcu-barc.org>), the Northeast Work Incentives Support Center at Cornell University (<http://www.workincentives.org>) and the SSA training and Technical Assistance Center at the University of Missouri at Columbia (<http://www.rcep7.org/ssa>).
- The Social Security Administration's (SSA) State Partnership Initiative (SPI) awarded cooperative agreements to 12 States to develop innovative projects to increase employment of people with disabilities who want to work. California, Illinois, Iowa, Minnesota, New Hampshire, New Mexico, New York, North Carolina, Ohio, Oklahoma, Vermont and Wisconsin are those states with SSA cooperative agreements. The Virginia Commonwealth University provides technical assistance to the SPI states, and their website contains information about benefits assistance best practices, as well as links to the individual state websites. Go to <http://www.spiconnect.org/>

The training described above only deals with the federal Social Security benefit programs and work incentives, which are only part of the programs that individuals with disabilities typically rely on for cash assistance, health care, and other subsidies. In addition to Social Security Disability benefits and Medicare, SSI and Medicaid, the benefits specialist and planners will need to learn about other programs including:

Staffing and Managing a BPA&O Program

- Housing subsidies available through the Housing and Urban Development (HUD) programs and administered through local, municipal, and private housing authorities
- Other cash transfer programs such as TANF, Food Stamps, Emergency Assistance that are administered by state and local or tribal government agencies
- Medicaid options elected by the state that provide health care to certain target populations, including people with disabilities
- Energy assistance available through the U.S. Department of Health and Human Services, called the Low Income Home Energy Assistance Program, administered by state and tribal coordinators
- Disabled veteran's benefits, administered through the Veteran's Administration

Rehabilitation Continuing Education Programs (RCEPs) serve the federal Rehabilitation Services Administration (RSA) regions and provide a variety of training and resource materials for rehabilitation personnel. The Community Rehabilitation Program (CRP) RCEPs offer training for public and private nonprofit agencies. Contact your regional RCEP for information regarding training opportunities for your staff. For a list of the RCEPs go to <http://www.ed.gov/offices/OSERS/RSA/PGMS/RT/catrcep.html>.

Print Resources for Benefits Specialists and Planners

For the adult who learns well by reading, there are publications available that describe the various programs. The Social Security Administration publishes a number of documents for the beneficiary, and these offer very basic reading for the benefit specialist. At the very least, the benefit specialist should have them available for the consumer who requests information. Pamphlets such as “Working While Disabled - How We Can help” and the “Redbook on Work Incentives for People With Disabilities” are available from the local Social Security Administration field office, or you can print them directly from their website at www.ssa.gov by going to the publications page.

An absolute “must-have” for every benefit planner is the “Benefits Management for Working People with Disabilities: An Advocate's Manual”, available from Neighborhood Legal Services, Inc. in upstate New York. Co-authored by James R. Sheldon, Jr., Supervising Attorney, Greater Upstate Law Project, Inc., and Edwin Lopez-Soto, Esq., Cornell University's Program on Employment and Disability, the manual is designed for advocates, rehabilitation professionals, attorneys, persons with disabilities, and others concerned with how work affects benefits. The Table of Contents can be viewed, along with a preview of the manual from their website, located at www.nls.org. The manual cost \$55.00 for a single copy, and you can order from the website or call the Greater Upstate Law Project for more information, at (716) 454-6500.

The experienced benefits specialist or planner, or those who are skilled at reading technical documents and legislative language, may want to acquire the documents used by SSA field office personnel, namely, the Program Operations Manual System (POMS), the Social Security Handbook, and the Social Security Rulings and Acquiescence Rulings. These are available on the Social Security Administration web site: <http://policy.ssa.gov/poms.nsf/poms?OpenView>

You can purchase hard copies of these documents from the United States Government Printing Office (GPO) at a subscription cost of \$238.00 for 12 issues (monthly rule changes are available) or \$29.00 for a single issue. To order government publications, phone 202-512-1800, fax 202-512-2250, mail orders to Superintendent of Documents, P.O. Box 371954, Pittsburgh, PA 15250-7954, or order online from <http://bookstore.gpo.gov/cdrom/cdrom219.html>.

Other Staff Development Approaches

In addition to researching, reading, surfing the web, and attending training sessions, another effective strategy is learning from co-workers. This often happens informally during consultations over the top of the “cube wall” or by stepping across the hall to a co-worker’s office, as well as more formally during the weekly case review. The following are an array of alternative staff development approaches that can be used.

Case Reviews

In some projects the case review is a forum during which the benefits specialist or planner can get assistance with complex cases from the entire team. Building on the group knowledge and expertise in the process, everyone learns something new while the group formulates creative and effective solutions. Staff may also bring instructive cases for review - problems that have been resolved but took a great deal of research or perhaps explored topic areas that few in the group know well. Other projects will review every new case at a weekly team meeting before the benefits specialist or planner writes the summary report. Everyone comes away with new information and resources to use in conducting their next analysis.

Staff should be well prepared to present a case, to ensure that the time is used effectively and they get the assistance they need. Everyone present must be prepared to offer ideas and opinions, and to reference specific sources of information if further research is required. Respecting the privacy of the consumer is important, so case reviews are conducted using first names or initials only, and should be held in a private area, e.g. the conference room.

Case Study

Another training tool is asking the new benefits specialist or planner to work on sample scenarios that range from answering simple questions to performing complex benefits analysis. This gives all personnel a chance to practice and make mistakes without harming anyone and allows for immediate feedback from a knowledgeable supervisor or co-worker. As the scenarios become more difficult, the benefits specialist or planner is required to research the topic, consult with others and use their creative problem-solving skills. The supervisor has an opportunity to observe them as they exercise judgment and make decisions, and can identify the areas in which the individual needs more training.

On-the-Job Training

On-the-job training is the most effective way to learn the job, as long as there are safeguards in place that will prevent the new benefits specialist from inadvertently causing harm to a consumer. Having a seasoned benefits specialist or planner or a knowledgeable supervisor work jointly with the new benefits specialist is one way to get the person started. Regular monitoring of the new employee’s work is important, even as the specialist gets increasingly independent.

If a manager does not have seasoned benefit specialists or planner or a knowledgeable supervisor, they may have to find creative ways to provide this level of oversight! One way to manage in this situation is the use of mentors.

Staffing and Managing a BPA&O Program

Using a Mentor

Attending seminars and workshops or reading available material will not be sufficient for the majority of benefit specialists or planners learning the content for the first time. If the number of benefits specialists or planners on staff is limited, that person may not have a co-worker with whom they can verbally process the information. There may not be another benefits specialist or planner within a 100 to 500 mile range. Identifying a mentor can counteract the feeling of isolation that many benefits specialists or planners experience as they are learning their job.

A mentor, as defined here, could be an employee of the Social Security Administration (SSA) local office or is a county financial worker and is therefore an “expert” in the rules governing the benefit program. The best mentor has a lot of experience in their job, and is willing and able to share that knowledge. Often, mentoring happens naturally as the benefits specialist or planner makes contact with various agencies in order to verify the information gathered during the initial interview with the beneficiary.

Relationships begin to form as both professionals work on behalf of mutual consumers. You will quickly learn who has the time and the patience to answer questions, and who is not likely to give a thorough answer because of a “too busy” caseload or schedule. Keep in mind that many of these government programs are understaffed, resulting in large caseloads and overworked personnel. It will be necessary to “nurture” the mentor relationship, and this is something the manager can do prior to hiring the benefits specialist or planner. As a manager, network with the agencies administering the benefit programs; explain that the goal of the benefits specialist or planner is to ensure better understanding on the part of the beneficiary or the recipient. Ultimately, the jobs of benefit programs’ staff will become more manageable as the benefits specialist or planner assumes some of the responsibility and as problems are prevented through better planning with the consumer.

The first place to look for a mentor is the local SSA Field Office. There may be a Staff Assistant, or a Work Incentives Liaison, or a Technical Expert whose responsibilities include outreach and community education. The Employment Support Representative (ESR) mentioned earlier will be a tremendous help to benefits specialists or planners fortunate enough to have one in their area. If none of the above is available, develop a relationship with a claims representative knowledgeable about both SSI and SSDI. In some offices, claims representatives specialize in one or the other program. If that is the case, it will be necessary to get the assistance of two people.

State Human Services departments or County Economic Assistance agencies usually administer Medicaid; TANF; SSI supplement or State Supplement (depending upon the State); Food Stamps; and emergency assistance programs. Having a mentor who understands the working rules of these programs will obviously be beneficial for the benefits specialist or planner.

It would be ideal to have an “expert” contact with both SSA and the state or county economic assistance department since the benefit specialist is responsible for information in both of these content areas. The effective managers needs to also think about the contacts their benefits specialist or planners will need in the area of Veterans benefits as well as the confusing area of subsidized housing where rules are often different from building to building, city to city and county to county.

Staff In-Service Training

Technical writing expertise is essential. One of the “products” of the benefits planning and assistance process is a written summary of the analysis. Writing a report of any nature is difficult for some, but writing a summary containing highly technical, bureaucratic language can be extremely challenging. The goal is to write the summary in such a way that anyone can understand it. The sheer complexity of the federal and state benefit programs make this a daunting task. Very few people are immediately good at explaining the rules on paper. A different set of skills is used to write an explanation, versus using the spoken word. With the spoken word, we can stop and restart a sentence if we see by the listener’s reaction that the information is not getting through. We can use informal language to put the person at ease. We can tell when to stop because the individual is overwhelmed with too much information. None of these cues are available when working on a written explanation.

If you consider the fact that there are university level programs that prepare “technical writers” - those people who write the instructions on the toothpaste tube - you will appreciate the challenge facing the benefit specialist who must write down an analysis of SSI, SSDI, and the work incentives attached to those programs; Medicaid, Food Stamps; subsidized housing; general relief programs.....the list goes on.

There are several ways to provide training in technical writing: 1) technical writing seminars; 2) an expert in your area who can work directly with your staff; 3) web-based training; or 4) self-instruction manuals or books on technical writing. Your local university or technical school may offer Business Writing courses that teach the basics of professional writing, including punctuation and grammar.

Other critical skill areas to be addressed in staff in-service training include: interviewing techniques, communication, and conflict resolution. One source of training is the Rehabilitation Continuing Education Program (RCEP). Disability awareness is another topic that requires attention. Increased awareness of different disability issues, sensitivity to language and/or behaviors that may be offensive to the person with a disability, and a realistic understanding of the myths that surround people with disabilities and the prejudice that creates barriers to employment will significantly enhance the benefit specialist’s ability to work with the customer. The best source of this training is people with disabilities who have personal experience with these issues.

Tools for the Manager

Supervising someone when a manager knows little or nothing about the content area is challenging, to say the least. Managers don’t have to become an “expert” in the content area to be a competent supervisor. One of the first actions they can take is to get some training. At a minimum you should get to public benefits training that also provides an overview of the SSA benefit programs; and technical writing classes so to assist in editing benefits analyses and other written reports.

Conducting Effective Meetings

Stay in touch and involved with staff and the work they are performing. Start out with new staff by taking the time to thoroughly orient them to the agency, its mission, its policies and procedures and to expectations as a supervisor. Use weekly supervisory check-ins with individual staff. Hold weekly case-review meetings with benefits specialists, even if they must be accomplished using a teleconference approach.

Staffing and Managing a BPA&O Program

The following are suggested agenda items you may want to incorporate into your staff meetings:

- Minutes of the last meeting are reviewed and approved
- Thank you notes to those who have been helpful to any of the benefits specialists are written
- Scheduling, calendars, upcoming events, next meetings – who’s going where?
- Assignments of cases
- General announcements
- Problem-solving program issues
- Case review
- Update on technical information
- Success stories, recognizing accomplishments and progress (puffin award)
- Mini-training on a topic area
- Data and record keeping issues
- Planning of trainings, events, staff in-services

Reviewing Individual Performance

If working for a community rehabilitation agency or in a comparable setting, observe benefits specialists or planners in a counseling session with a consumer, and look for clarity in the way they communicate information. If the consumer appears confused, or gets agitated because they don’t understand the material, then the benefits specialist or planner is not communicating well. Note whether or not they use bureaucratic “jargon” or are able to translate it into lay terms. Does the benefits specialist or planner spend adequate time with the consumer? Do they listen to the consumer and answer all the consumer’s questions? Does the benefits specialist or planner sound confident? If the consumer were a family member, would the staff’s performance be satisfactory? Keep in mind that the counseling session is confidential and the benefits specialist or planner should first get permission from the individual being served to allow you to observe.

Another strategy for reviewing performance is to use mentors and ask them to evaluate the benefits specialist’s or planner’s knowledge of the program. Arrange to have the mentor or someone knowledgeable about the benefit programs conduct “mock counseling” sessions, either via telephone or in person. As described earlier in the training section use case scenarios in which the benefits specialist or planner is required to explain the impact of work on eligibility, level of payment, and work incentives available. The benefits specialist’s or planner’s knowledge and skill in communicating information can be assessed using this technique.

In addition to mentors, consider using consultants who have skills you lack for assistance. Call peers around the country who have benefits specialists or planners on their staff. They are probably experiencing similar problems. Have benefits specialists or planners do some peer supervision using a technique like case review described earlier where benefits specialists or planners help each other problem-solve, correct mistakes and work through complicated cases.

Consumer Satisfaction Surveys are another important tool for evaluating performance, both on a programmatic as well as personal level. Conduct a consumer satisfaction survey, but be aware that many consumers have a hard time retaining the information they are given about their benefits. The survey could focus on the consumer’s rating of the knowledge of the benefits specialist or planner, friendliness and courtesy, helpfulness of information provided and overall satisfaction with the services provided. However, this will not tell you about the technical knowledge of staff. It will give you an

indication of how well you're the benefits specialist or planner is doing in building rapport, being responsive to the consumer and in establishing their credibility. Technical knowledge doesn't mean much if the benefits specialist or planner can't perform well in these other areas. A Customer, or Consumer, Satisfaction Survey can be accomplished in several different ways. A brief questionnaire inserted into a regular mailing is one approach; another is a more in-depth telephone survey. A sample of each type is in Appendix C.

All that said, nothing replaces personal observations on the part of a manager. As an effective manager/supervisor make sure to review all written documentation periodically and get input from outside sources as a regular part of the formal performance review process.

Caseload and Scheduling Strategies

A question often asked pertains to the appropriate size of a caseload for the benefits specialist or planner. This is a difficult question, because the intensity of service varies greatly from one program to the next. If long-term benefits management is provided to every consumer, the benefits specialist or planner can juggle about twenty-five active cases at any one time. If some consumers receive short-term assistance and others more in-depth service, the number will be higher.

It is helpful to develop a system of tracking the work completed by the benefits specialist or planner and the time spent performing various tasks. Benefits planning and assistance must be done in a timely fashion, or the information will become outdated. Some consumers may need to take action quickly in order to get an appeal filed, to meet deadlines etc. The benefits specialist's or planner's ability to act in a timely manner is essential and the supervisor must stay informed about staff's performance in this area. A tracking tool is an effective way to monitor the workflow and workload of your benefit specialist. The Sample Tracking Form found in Appendix D was created by Employment Resources, Inc. to allow the manager to monitor the status of each customer assigned to a benefit specialist and to determine if established timelines are being met. It can also serve as a tool for organizing the tasks involved in a typical benefits analysis.

Supervision and Support

Supervision should be individualized and based on the benefits specialist's or planner's prior knowledge and experience, skills, personality, learning style, need for support, recognition of skill deficits, etc. There are no hard or fast rules about how quickly an individual should progress from training to independent benefits specialist or planner, nor is it possible to predict which techniques will be most useful in training, supporting, and supervising your benefits specialist or planner.

Actively involving the individual in defining time-lines for learning and in identifying what kind of supervision has worked for them in the past can help you establish some guidelines. Some experimentation will be necessary, and close attention should be paid to staff's performance, without hesitating to modify what doesn't work. "Unconventional" training and supervision strategies should be explore



Appendix A:

Resume Screening Tool

Resume Screening Tool

Applicant name _____

Screening date _____

Apply one point for each of the following characteristics that are addressed in the cover letter or resume:

1. Experience with people with disabilities
 - Personal
 - Professional
 - Volunteer
2. Experience working with government benefits
 - Personal
 - Professional
 - Volunteer
3. Mention of work incentives in resume or cover letter
4. Mention of barriers to work for people with disability
5. Vocational experience assisting people with disabilities to work
6. Cover letter is well written—grammar, punctuation, spelling
7. Cover letter specifically provides the information requested in the job posting or specifically responds to the job posting—not a cookie-cutter cover letter
8. Cover letter makes the case for why a good candidate for this specific job
9. Resume is well written—conveys information clearly, grammar, punctuation and spelling.
10. Education in vocational rehabilitation, human services or law. (or equivalent life experience—2–4 years)
11. Other—something positive or creative that catches your attention.

Total points:

Scoring system:

Assign one point to each item/characteristic met by the candidate through their cover letter and resume. Total the number of points. Use number to prioritize who you will interview.

Variation in scoring:

Change the items or add to them to make them specific to your situation and agency.

Assign same number of points as years of experience in items 1, 2, and 5. Score one point for all other items (3,4,6-11) met by the candidate through their cover letter and resume.

Assign weighted points to items that are most important to you.

RESUME / INTERVIEW EVALUATION CHECKLIST: Benefits Specialist / Planner

Candidate: _____

Reviewer: _____

Date: _____

Exceptional = 5

Acceptable = 3

Marginal = 1

Unacceptable = 0

Criteria Required Skills	Relevant Levels of Experience and Training for Each Criterion*	Score	Weight	Total
Benefits planning experience	<i>Exceptional</i> - Five or more years directly related experience <i>Acceptable</i> - Less than five year related or experience in training <i>Unacceptable</i> - Little or no related experience		3	
Reporting writing experience and writing skills	<i>Exceptional</i> - Five or more years experience <i>Acceptable</i> - Less than five year related or experience <i>Unacceptable</i> - Little or no related experience		3	
Computer and mathematical skills and application of technology	<i>Exceptional</i> - Proven use of computer technologies and mathematical computation <i>Acceptable</i> - Some experience / use <i>Unacceptable</i> - Little or no related experience		3	
Counseling and communication experience	<i>Exceptional</i> - Five or more years directly related experience <i>Acceptable</i> - Less than five year related experience <i>Unacceptable</i> - Little or no related experience		3	
Marketing experience	<i>Exceptional</i> - Five or more years of experience <i>Acceptable</i> - Less than five years of experience <i>Unacceptable</i> - Little or no prior experience		3	
Knowledge of special topics (i.e. state benefits, Medicaid, transition planning, etc.)	<i>Exceptional</i> - Three or more specialized topics <i>Acceptable</i> - Less than three specialized topics <i>Unacceptable</i> - Little or no knowledge of special topics		2	
Systems intervention experience	<i>Exceptional</i> - 5 or more years directly related experience <i>Acceptable</i> - Less than five year related or experience <i>Unacceptable</i> - Little or no related experience		2	
Experience in conducting community outreach and education	<i>Exceptional</i> - 5 or more years directly related experience <i>Acceptable</i> - Less than five year related or experience <i>Unacceptable</i> - Little or no related experience		2	
Experience networking with community schools, adult service providers, families, and the disability community	<i>Exceptional</i> - 5 or more years directly related experience <i>Acceptable</i> - Less than five year related or experience <i>Unacceptable</i> - Little or no related experience		2	
Networking statewide	<i>Exceptional</i> - 5 or more years directly related experience <i>Acceptable</i> - Less than five year related or experience <i>Unacceptable</i> - Little or no related experience		1	
Networking on a national level	<i>Exceptional</i> - 5 or more years directly related experience <i>Acceptable</i> - Less than five year related or experience <i>Unacceptable</i> - Little or no related experience		1	
Writing skills as applied to promotional writing	<i>Exceptional</i> - Significant demonstrated experience in professional writing, development of promotional materials and other related writing skills <i>Acceptable</i> - Some demonstrated experience in these skills <i>Unacceptable</i> - Little or no related experience in these skills		1	
Grantmanship	<i>Exceptional</i> - Demonstrated success in securing grants <i>Acceptable</i> - Some experience in grant writing <i>Unacceptable</i> - Little or no related experience		1	
CANDIDATE TOTAL				



Appendix B1:

Work Incentives Problems and Scenarios – Benefits Specialist Position

Work Incentives Problems and Scenarios Benefits Specialist Position

NAME:

DATE:

You have two hours to complete this test. A calculator is provided for your convenience. The Acronyms list and the Red Book on Work Incentives can be used as reference materials. Other materials are not allowed. Be sure to show all of your work in answering these questions.

1. Name and describe in your own words, two of the primary work incentives associated with SSI.

2. Name and describe in your own words, two of the primary work incentives associated with SSDI.

3. Name a work incentive that is common to both the SSI and the SSDI programs.

4. What is the current FBR amount?

5. Define the FBR and explain how it is used.

6. What is the current SGA amount for individuals who are not blind?
7. Who does SGA apply to?
8. Name the public health care program most people on SSI use to pay their medical expenses.
9. Name the public health care program that is attached to receiving SSDI.
10. Why is 1619 (b) important?
11. What is PASS?
12. Gina has been receiving \$800 SSDI each month since February 2001. Gina has not used any of her TWP. On April 1, 2002 Gina starts a job at Wal-Mart earning \$880 per month. Is Gina eligible to receive SSDI cash benefits for April 2002? (Circle answer): YES or NO
13. Mike began receiving SSDI since 1/97. He started working for the first time in 3/98 and has worked at several different jobs since then. The TWP level was \$200 from 1998 through 2000. The SGA level was \$500 prior to July 1999 when it became \$700. The SGA increased to \$740 in January 2001 and increased again to \$780 in January 2002. Mike's earnings have been as follows:

03/98.....\$210	05/99\$496	07/00 \$642	09/01 \$505
04/98.....\$300	06/99\$442	08/00 \$696	10/01 \$596
05/98.....\$199	07/99\$489	09/00 \$696	11/01 \$598
06/98.....\$678	08/99\$485	10/00 \$697	12/01 \$597
07/98.....\$605	09/99\$492	11/00 \$644	01/02 \$557
08/98.....\$ 0	10/99\$485	12/00 \$668	02/02 \$586
09/98.....\$235	11/99\$ 0	01/01 \$678	03/02 \$595
10/98.....\$187	12/99\$ 0	02/01 \$698	04/02 \$698
11/98.....\$562	01/00\$ 0	03/01 \$687	05/02 \$799
12/98.....\$578	02/00\$ 0	04/01 \$698	06/02 \$868
01/99.....\$518	03/00\$495	05/01 \$686	07/02 \$885
02/99.....\$468	04/00\$496	06/01 \$699	08/02 \$845
03/99.....\$480	05/00\$625	07/01 \$489	09/02 \$790
04/99.....\$488	06/00\$545	08/01 \$ 0	10/02 \$650

- A. When does Mike’s TWP begin?
- B. When does Mike’s TWP end?
- C. When does Mike’s EPE begin?
- D. When does Mike’s EPE end?

14. Kelly receives SSI payments of \$545/month. She also receives the State Supplement of \$81/month and Medicaid at no cost. Kelly begins working for Target in February 2002. Her February earnings total \$580.

- A. Do Kelly’s February earnings count as a Trial Work Period month?
 YES or NO
- B. What is the amount of SSI payable based on Kelly’s earnings?

SHOW YOUR CALCULATIONS

C. Is Kelly still eligible for the State Supplement? YES or NO Why?

D. Is Kelly eligible for Medicaid? YES or NO Why?

15. Kelly increases her work to full-time in March 2002. She earns \$300 gross per week and receives four paychecks in March.

A. What is the amount of SSI payable based on her increased earnings?

SHOW YOUR CALCULATIONS

- B. Is Kelly eligible for Medicaid? YES or NO Why?
- C. Does she have a Medicaid spend-down? YES or NO
16. Dan receives \$350 SSDI and \$215 SSI each month. He also receives \$81 State Supplement monthly and has Medicaid at no cost. Dan begins working at Burger King in March 2002 and he earns a total of \$400.
- A. What is the amount of Dan's SSI payment in March 2002?
- B. What is the amount of Dan's SSI payment in April 2002?
- C. What is the amount of Dan's SSI payment in May 2002?

SHOW YOUR CALCULATIONS

- D. Is Dan still eligible for the State Supplement? YES or NO Why?
- E. Is Dan still eligible for Medicaid? YES or NO Why?
17. You are a Benefits Specialist for one of your State's BPAO projects. Two consumers have asked you how the increase in the SGA on January 1st affects them. Sam is on SSDI and Sharon is on SSI. Both are working part-time. What will you tell each of them about the impact of the increase in SGA?

18. You are working alone late one afternoon at the BPAO office. You take a phone call from a frantic caller who has to call a prospective employer first thing in the morning to accept a job offer. The caller wants to know what will happen to all of his benefits when he takes this job. You know that you will not be able to give him a thorough analysis of his situation. What will you do?

19. Margaret just received an overpayment notice from the Social Security Administration (SSA). She calls you, sounding very upset and saying that she is going to quit her job since she believes that SSA is “out to get her” because she is working. What will you do?

20. Jim, one of the consumers you worked with recently, calls you sounding angry and agitated. He accuses you of causing him to lose his SSDI benefits. He believes you gave him inaccurate information. He tells you that you are incompetent. What steps will you take to handle this call and to resolve the problem?

FREQUENTLY USED TERMS/ACRONYMS RELATED TO GOVERNMENT ENTITLEMENT PROGRAMS

EPE.....Extended Period of Eligibility

FBRFederal Benefit Rate

PASSPlan for Achieving Self-Support

SGA.....Substantial Gainful Activity Level

SSI.....Supplemental Security Income

SSDI.....Social Security Disability Insurance

TWPTrail Work Period



Appendix B2:

Work Incentives Problems and Scenarios – Benefits Specialist Position

Work Incentives Problems and Scenarios Benefits Specialist Position

NAME:

DATE:

-
1. List two of the major barriers to employment for people with disabilities.
 2. Discuss the values and viewpoints you have regarding people with disabilities.
 3. Which disability group(s) are you most comfortable working with? Which group(s) are you least comfortable working with?
 4. Name two of the primary work incentives/employment supports associated with SSI.
 5. Name two of the primary work incentives/employment supports associated with SSDI.

6. What is the current SGA limit for individuals who are not blind?
7. What is the current FBR amount?
8. Name the public health care program most people on SSI look to, to pay their medical expenses.
9. Name the public health care program that is directly connected to receiving SSDI.
10. List the steps you usually take to establish rapport with new people.



Appendix C1:

**Benefits Counseling and
Analysis Survey**

Appendix C1 Employment Resources, Inc.

BENEFITS COUNSELING AND ANALYSIS SURVEY

1. Were you employed when you received the Benefits Counseling Services?
 Yes
 No
2. For some individuals, the fear of losing benefits like SSI or SSDI or Medical Assistance by returning to work is a real barrier preventing them from seeking employment. Was the potential loss of benefits a barrier to employment for you?
 Yes
 No
3. If the potential loss of benefits was an employment barrier for you, did the Benefits Counseling process help remove that barrier for you?
 Yes
 No
Please explain:
4. Work incentives include programs such as Section 1619 that allows individuals who receive SSI to go to work and maintain their Medical Assistance (MA) coverage or IRWE, which are employment-related work expenses that reduce the amount of countable income for Social Security purposes. Did you know about work incentives prior to participating in the Benefits Counseling Process?
 Yes
 No
 Somewhat

5. Did you learn from the Benefits Specialist which work incentives were available to you?

Yes

No

If “Yes” can you name one or two of the work incentives you learned about?

6. During this process, if you had an immediate concern or question regarding benefits, how quickly did the Benefits Specialist respond?

Within 1 day

Within 2 days

Within a week

After 1 week

Not at all

Can't remember/don't know

7. How long did the entire Benefits Counseling/Analysis process take?

Less than 1 month

Between 1-2 months

Between 2-3 months

Over three months

Can't remember/don't know

8. What did you like about the Benefits Counseling process?

9. What didn't you like about the process?

10. Were you given the information you needed to make an informed decision about whether to return/go to work?

Yes

No

11. If you already were working when you received your Benefits Analysis, did the results of the analysis change your work plans?

Yes.

If so, how?

No

12. How did the Benefits Analysis affect your employment planning process, if at all?

13. Did you feel confident in the information you received from the Benefits Specialist?

Yes

No

Please explain:

14. Do you remember anything you learned in the Benefits Counseling process?

Yes

No

If "Yes" please explain:

15. Would it be helpful to receive Benefits Counseling over a longer period of time than what was provided? For example, if you were not employed when you received a Benefits Analysis, would it be helpful to work with a Benefits Specialist for a period of time after you begin working to assess the impact that earned income has on your benefits?
- Yes
- No
16. Did you receive a written Benefits Summary?
- Yes
- If “Yes” could you understand it?
- No
- If “No” would a written summary have helped?
17. What might ERI do differently in preparing that final written summary for you that would make it more useful to you?
18. Why did you access this service in the first place?
19. After having participated in the Benefits Counseling process, do you feel better able yourself to figure out the impact working will have on your benefits?
- Yes
- No
20. If no, what additional steps might have helped you or would help you now?
21. Do you have any other thoughts or ideas regarding the Benefits Counseling services you received that you would like to share?

Thank you for completing this survey!



Appendix C2:

Satisfaction Survey



♥ TAKE HEART! USUALLY, WE SEND YOU LOTS OF STUFF TO READ. THIS TIME, WE JUST NEED YOU TO CHECK SOME BOXES AND GIVE US YOUR OPINION! ♥

Satisfaction Survey *Spring 2002*

Please TELL US WHAT YOU THINK about the Minnesota Work Incentives Connection!

There are 3 easy ways you can respond to the attached survey:



Mail it back in the enclosed envelope.

(Sorry, but you'll need to supply the stamp. We're not just cheap. We're saving your tax dollars.)



Fax it to us at (651) 632-5121.



Complete it over the phone by calling us at:

(651) 632-5113 or 1-800-976-6728

Choose whichever option is easiest for you, but please, please, *please* do respond by **May 1, 2002**. We really need your feedback!

Please don't make us beg you to respond....

Okay, okay...we're begging....

It'll only take a few minutes.
Honest!

We'll be eternally grateful
if you do this.
Thanks in advance!






Give us a piece of your mind!





The Minnesota Work Incentives Connection helps people with disabilities go to work with clear, accurate information about the effects of work on government benefits. It's a joint project of the Minnesota Departments of Economic Security and Human Services, funded by the Social Security Administration.

Minnesota Work Incentives Connection Satisfaction Survey

1. Please check the rating that best describes your experience(s) with the Minnesota Work Incentives Connection:

	Very DISsatisfied 	DISsatisfied 	Neutral 	Satisfied 	Very Satisfied 
Clarity of information provided					
Usefulness of information provided					
Staff members' knowledge/expertise					
Friendliness and courtesy of staff members					
Overall satisfaction					

2. What's your opinion of Connection services you have used? *(Please check all that apply.)*

SERVICE(S) USED	DISsatisfied 	Satisfied 	Haven't Used
Called with a question about work and benefits.			
Received a comprehensive, written Benefits Analysis about my personal situation.			
Participated in a half day or full day Training session			
Attended a 1- 2 hour outreach presentation in or near my community, or at a conference I attended.			
Read the Connection's newsletter.			

3. If you could say something positive about our services, what would it be?

Continued on next page

4. If you could change something about our services, what would it be?

5. Please give us your zip code: _____

(If you prefer, you can give us just the first 3 digits of your zip code. This will tell us how well we are serving different parts of Minnesota.)

6. Please check the category that best describes your role when you used the services of the Minnesota Work Incentives Connection.

*(A lot of you talented people wear multiple hats, but **please choose only one.**)*

Consumer with a disability looking for assistance with my personal situation

Family member or friend of a person with a disability

Advocate

Provider *(private voc rehab, CSP, counselor, other non-govt. service provider)*

Employer *(if supported employment, check "Provider" above)*

County case manager or social worker

County financial worker

MN Rehabilitation Services or State Services for the Blind staff member

Social Security representative

Other government (Please specify: _____)

Other non-government (Please specify: _____)

Name (optional): _____

Phone (optional): _____

Thank you for completing this survey. Your feedback helps us improve the benefits planning and assistance services we provide.

Thank you, thank you, thank you, thank you, thank you, thank you, thank you, thank you.....



Appendix D:

Benefits Planning and Assistance Sample Service Tracking Form

Tracking Sheet # _____

Appendix D

Benefits Planning and Assistance Sample Service Tracking Form

Staff Member _____

NUMBER	Consumer Name	Date of First Inquiry/Contact	Referral Source	Date of First Consultation/Intake	Date Releases		Benefits Profile Complete (mo/yr)	Benefit Verification	Follow-up	Benefits Analysis Complete (mo/yr)	Meeting with consumer (mo/yr)	Follow-up needed? Y/N	Follow-up Date (mo/yr)
					Sent	Returned							