

DB101 Benefits Coaching Guide



MN DHS
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Executive Summary

This document is intended to be a guide for helping job seekers with disabilities understand the impact of work on their benefits and their total financial well-being.

There are many different aspects to supporting people in their quest for economic advancement. Some of the processes and best practices are laid out in this guide. Others will be developed with new tools, resources and processes specific to your local area and each individual person you support.

When you have questions, consult with a Work and Benefits Planner (WBP) at the Hub, if you have been assigned a mentor, you can reach out to them directly.



Keep in mind this is a relatively new service and with experience, research, analysis and evaluation we are developing new ways of doing business. We need to learn from each other and share experience. If you have feedback on how to improve any process please share that feedback with Abigail Helget, the Benefits Planning Capacity Builder at the MN Department of Human Services, and/or discuss your ideas at the regular Benefits Planning Network meetings.

What this GUIDE is NOT

This Guide does not address your financial education and planning responsibilities. If you have questions about financial education and planning please talk to your Program Manager, Vocational Rehabilitation (VR) Regional Area Manager (RAM).

Main Communications Channels

What do you need	Place to go
DB101 Benefit Lookup	DB101 Vault
Benefit Summary & Analysis (BSA)	Hub Work and Benefit Planner/Mentor
Work and Benefits Technical Assistance	Hub Work and Benefits Planner or DB101 chat
Questions about financial education and planning	VR/IL Program Manager, VR Regional Area Manager

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Financial & Benefits Planning

Step 1: Identify Need and Intake Prep

- Receive referral or identify need for Benefits Planning
- Gather necessary releases from the person that is making the referral (Partner Release, Social Security Administration [SSA], housing, Veteran’s Administration [VA], etc.)
 - Each person will need two SSA-3288 releases signed. They can be found (by VR staff) on the VR Sharepoint site or on the DB101 Partners tab.
 - The release needed to share information between VR, the Centers for Independent Living (CILS), Hub, Department of Human Services (DHS) also known as the Partner release, is required before any personal information about the client can be shared. This release can also be found (by VR staff) on the VR Sharepoint site or on the DB101 Partners tab.
- **Note:** To speed the process, the person making the referral (often VR Counselors) should get the signed releases from the participant and put the Benefit Coach’s name on the release for Social Security.
- Request a Benefit Planning Query (BPQY) from SSA (see instructions on page 8)
 - In some instances the VR counselor will request the BPQY before sending the referral. Work with your local VR office and your supervisor to determine the best practice for your area.
- Create a Contact in the Pro version of [My Vault](#) and Request a Benefits Lookup
 - Create the individuals contact in your Pro Vault so you can do work on their behalf.
 - “Get a Benefits Lookup,” through your own Pro Vault using the Partner Release.
- Schedule Intake Meeting
 - Determine who needs to be in attendance at the intake meeting?
 - VR Counselor, Placement Specialist, guardians, family members, case managers, friends or other informal supports?
 - If key members of the person’s team can not come to the meeting, are there other ways to get information from them? For example a video meeting, phone call, email or separate meeting?
 - Contact the referral source about when the Intake meeting is scheduled

Step 2: Intake (Meeting 1)

- Begin to complete the Benefits Planning Summary in your Pro Vault
 - **When:** This activity should be started as soon as you have information about the person to answer the questions. Start filling the information in as soon as you have it - this may be prior to, during or after the intake meeting. There are some situations that you don’t fill this out, if you have a separate intake that you use, however using the Vault is preferred

- **Why:** This activity is meant to provide a place for you to gather information about the person that is not collected in any other activity. It is available only to people who have the “professional” DB101 Vault role. You can also easily share the information with the person or others on the team.

Tips:

- Before the meeting look through the **Benefits Planning Summary** form and referral paperwork to identify information you already have from other sources.
- Complete as much of it as time allows and as the person feels comfortable with.
- If the person does not have an earnings goal, or needs help figuring out an earning goal contact the referral source to determine if there is already a work goal. You can also help them determine their Living Wage at this website: [Cost of Living in Minnesota](#)
- Introduce DB101
 - Show the [Welcome](#) video (1.5 minutes)
 - Help the person create a MyDB101 account (instructions page 8 - 9):
 - Create a MyDB101 account (may involve helping them get an email address) and keep track of their logon and password,
- In the Vault complete “**Start a Plan,**” through the person’s Vault
 - **When:** This activity should be used when a person is not sure why they are in the Benefits Planning Path, what they need, or what activities they should do. It is generally not useful for professionals doing benefits planning because they already know the person is on public benefits, is interested in work and has questions about how work impacts benefits. This activity is generally helpful for public users who are working on their own, without the help of a Benefit Coach.
 - **Why:** This activity is meant to help users (public) navigate and be sure they are in the right place, completing the right activities so that they have the best information to help them plan and make informed decisions. We want to make it clear that this path, and the following activities are to help understand how work affects benefits. If they don’t have public benefits, aren’t interested in working or don’t have any questions about how work affects benefits, then they are probably not in the right place and we suggest other things like a quick budget, or work and savings.
- Request a **Benefits Lookup** through their DB101 Vault under Paths, Step 1, “Start a Benefits Plan.” Note: You should always assist someone with requesting a Benefits Lookup in their own Vault even if you have completed one in your own Pro Vault already.
 - **When:** This activity should be used for anyone who is interested in understanding how work impacts their specific benefits. Benefit Coaches must get a DB101 Benefit Lookup with every referral for benefits coaching services. The Benefit Lookup must be requested and received at the very beginning, before providing any advisement.
 - At initial referral, as soon as Partner Release is received, request a benefit lookup on behalf of the person.
 - At Intake meeting, help the person request their own benefit lookup.

- **Why:** This activity is necessary to be sure you have the correct information on the person's specific state and federal benefits so that you are giving correct information about benefits and advisement on the effect of work on those benefits. It is also necessary to help ensure the information on file at the benefit office (local county, Social Security, etc.) is accurate and the person is getting all of the benefits they should be getting and not getting a benefit they should not be getting.
- If not already done, have person sign all necessary releases (samples page 23-25)
 - VR/CIL/HUB/DHS
 - SSA
 - Housing (if applicable)
 - Others as necessary
- Build a Benefits Planning Team under Paths, Step 7
- Schedule next meeting (include Work & Benefit Planner or any other people that are part of the employment team, if necessary) Contact the referral source and let them know when the next meeting is scheduled

Step 3: Request Benefits Information and Complete a Benefits Check-up

- Request **Benefit Lookup through your Pro Vault if you have not done this yet** to get benefits and income information from the Department of Human Services (DHS) and review
 - See instructions on page 11-12
- Review the BPQY to get details of SSA benefits and work history
 - VR staff may have already requested the BPQY from BPQY or they have gotten the releases for SSA completed so you will have this ahead of time. There may be times however, that you will have to get the BPQY after the initial meeting..
 - See instruction on page 10-11
- Review BLU to confirm what benefits
- Request and review housing or other benefits verification necessary. Contact each agency to get benefit information not available through DHS or SSA.
- Compare all information gathered to ensure that the individual you are working with is receiving all benefits potentially eligible for and to see if there are any benefits someone is receiving that may not be eligible

Step 4: Complete Benefits Planning Decision Guide

- Complete a preliminary **Benefits Planning Decision Guide** on behalf of the consumer through your Vault to determine if a DB101 estimator session and Benefit Report is enough or if a full BS&A may be needed.
 - **When:** This activity should be completed after verifying benefits, after the intake meeting and again if/when you learn new information about the person's benefits or situation. Benefit Coaches must complete this activity and share it with the Hub Work and Benefit Planner when requesting technical assistance, or a Benefit Summary and Analysis (BS&A).

- **Why:** This activity is meant to help you determine what level of benefits planning the person needs (Estimator, Estimator + technical assistance, or full Benefits Summary and Analysis), and what type of assistance you might need to understand and explain their benefit and work situation. It is available only to people who have the “professional” DB101 Vault role.
- Use information from the (as available) to gather information needed to complete the **Benefits Planning Decision Guide**.
 - **Referral Paperwork (referral form, VR intake application, etc)**
 - **BPQY,**
 - **DB101 Benefits Look Up**
 - **Benefits Planning Summary and;**

Note: Completing the Decision Guide is an important step and should be done with *every person*. It will help you think through and provide recommendations about the level of assistance you and/or the person you’re working with will need to answer benefit questions. Starting off, you will likely need to connect with a Work and Benefits Planner on the majority of cases. As you learn and develop knowledge, you will be able to answer questions and provide some benefits planning on your own.

Step 5: Complete a Work and Benefits Estimator and Write a Benefit Report

- Complete a **Benefit and Work Estimator** if someone is Path 1 or 2
 - **When:** This activity should be completed after the intake meeting, prior to the planning meeting. It should be used again during the planning meeting with the person, if appropriate. Benefit Coaches should complete this activity on behalf of the person and review and understand the results prior to meeting with the person. This activity is required for most people, except when the person has a situation on Path 3 of the Benefits Planning Decision Guide and the benefit or situation cannot be handled by the Estimator.
 - **Why:** This activity (Benefits & Work Estimator) is meant to help a person see what might happen to their benefits when they go to work so they can plan and set goals.
 - "Share this session" with the Work and Benefits Planner if you need technical assistance, or if you are requesting a BS&A. See pages 14-15 for instructions.
 - Note: When you first start doing benefits planning you should send ALL of your estimator sessions to your mentor for review.
- Write a **Benefit Report** either using the template for someone that is Path 1 and 2 or someone that is Path 3 and needs a BSA. Note: There are separate templates and instructions for these reports.
 - **When:** This activity should be done after completing the Benefits Planning Decision Guide and determining the person may need a full Benefits Summary and Analysis (BSA). It must be done prior to the BSA HotDocs activity.
 - **Why:** This activity is necessary to gather additional information needed to complete a Benefit Summary and Analysis (BSA). It is intended to be used along

with the “Get a Benefits Lookup” activity, and cannot be requested without that activity being done first. It is also necessary to help ensure the information on file at the lead agency is accurate. This activity is only available to certified Community Partner Work Incentives Coordinators who have been assigned this specific professional DB101 Vault role.

- Use information that has been gathered in the **Referral Paperwork, Benefits Summary, BPQY, Benefits Lookup and Benefit and Work Estimator** and any other benefit verifications you have gathered to complete the **Benefits Report**.

Step 6: Requesting Technical Assistance and/or Benefits Summary and Analysis from the Hub

- **Requesting Technical Assistance:**

When you need basic technical assistance related to benefits (help sorting through benefits, work incentives, reviewing the Benefit Report or other issues):

- Reach out to the Work and Benefits Planner or your mentor (if you’ve been assigned one) directly to see if they are available
- Call the Hub 1-866-333-2466,
Or
- Start a DB101 chat

Note: If you reach out directly to the Hub or through DB101 chat, any Options Counselors can help with general questions about benefits, but will connect you with an available Work and Benefits Planner when the question or needed service is beyond their scope.

- **HUB Referral for Benefits Planning (Requesting a Benefits Summary and Analysis or more in-depth Technical Assistance):**

If you would like a Work and Benefits Planner to attend the planning meeting, if you think a Benefits Summary and Analysis (BS&A) may be needed, or if the Work and Benefits Planner who is your mentor is not available, contact the Hub directly by phone or chat.

Step 7: Prepare for Planning Meeting

- Run DB101 Estimator session(s) again if needed using the person’s benefit information (from the **BPQY, DB101 Benefits Look Up and Benefits Planning Summary** form), earning goals, and/or Living Wage amount.
- Review **Benefits Planning Summary** and **Benefit Report Next Steps** to identify any major issues, goals, or follow ups that need to be addressed in next meeting.
- Talk with VR Counselor & Placement Specialist (and others on employment team) about person’s earnings goals, benefit concerns, and needs/wants, that haven’t been addressed yet.
- Gather appropriate resource referrals (use the **Resource Directory, MinnesotaHelp.info**, etc.)
- Gather any additional releases that are necessary (e.g., housing, VA, etc.)

Step 8: Hold Planning Meeting

- Share resources you've gathered
- Have person sign additional releases, if needed,
- Complete steps 3-7 in the individual's Vault if they have not already been completed in the intake meeting
 - **Do a Quick Budget**
 - Adjust earnings and expenses to see how changes to earnings can affect someone's budget
 - **When:** This activity should be used with the person when they need to see what their bottom-line income will look like, including expenses not included in the Estimator.
 - **Why:** This activity is meant to help people see how much money they will have in their pocket at the end of the month after expenses are paid. It is especially helpful for people who are on the fence about working, are unsure of how much they should work, or have financial concerns outside of benefits. It can help people see the whole picture of earned income, benefits, and their most common expenses so that they can make the best decisions.
 - **Make a Work Plan**
 - **When:** This activity should be used after or while you talk with the person about their employment goal(s) and before running an Estimator session. Many people who are referred for benefit coaching services already have a clearly defined work goal, some do not.
 - **Why:** This activity is meant to help the person clearly identify and articulate their work and earnings goal so that
 - **See How Work and Benefits Worker Together (Estimator Session)** again if goals have changed or additional information is needed
 - Have person log into their MyDB101 account and share session with you when done
 - Show how to Talk to an Expert and how to add another earning goal, if appropriate
- Review results and check to make sure they're consistent with financial goals,
- Review the **Benefit Report** (if applicable)
- Check in on goals and/or document new goals,
 - Use the **Benefit Report's** "Next Steps," section
- If necessary, introduce concept of **Benefits Summary and Analysis** and action steps.
 - Remember to coordinate meeting with the Work and Benefits Planner if technical assistance or BS&A is needed. The Work and Benefits Planner may help walk person through any unanswered questions on the **Benefits Planning Summary** and gather information needed to develop the BS&A.
- Schedule follow-up meeting and let the referral source know when it is scheduled for
 - If BS&A is needed, schedule with the Work and Benefits Planner to deliver the BS&A

- If BS&A is not needed, follow up to give person time to digest information and come back with questions, additional goals, etc.
- Send **Benefit Report** to referral source

Step 9: Hold Follow-Up Meeting

- If BS&A:
 - Deliver the BS&A and review with participant
 - Have printed copy of BS&A for the person
 - Explain the Work and Benefits Planner will walk them through the details of the BS&A
 - If the Work and Benefits Planner is joining by phone, watch for body language or cues that the person has questions or is not understanding
 - Provide encouragement and support
 - Along with the Work and Benefits Planner, confirm earning goal
 - Review **Benefit Report Next Steps and Important Things to Remember**
 - Add or change goals or action steps as needed
 - Review who is responsible for doing what
 - Identify any barriers to completing steps and help with solutions
- If no BS&A
 - Ask if they have any follow up questions about the DB101 estimator session, if they'd like to run another estimator session with different earning goals, if they have any questions or concerns about reaching their financial goals given estimator results
 - Review **Benefit Report Next Steps and Important Things to Remember**
 - Add or change goals or action steps as needed
 - Review who is responsible for doing what
 - Identify any barriers to completing steps and help with solutions

Step 10: Proactive Follow-Up

- Check in to see if the person is able to accomplish their steps
- Check in to see if resource you referred them to is providing what they needed
- Talk about reporting earnings to various agencies to help avoid overpayments
- Check in on earning goal and if there may be a need to update the estimator session or BS&A
- Check in on benefits – did benefit stop or change when it shouldn't have (or not change when it should have)?
- Identify resources person can use to reach goals and stay on top of action steps
- Use the **Benefit Report** to keep track of what you need to do vs. what others are doing

Appendix

A. Setting up a Consumer in your Pro Vault

- Go to [DB101](#), click on “My Vault”
- Go to the, “Contacts,” tab and click on it
- Next to the search/filter function you can click on the blue box that has a “+” sign and says “Add Contact.” Click on it
- Fill out the contact information and click, “Save,” on the bottom
- The person will now appear in the drop down menu in the Paths tab in the Vault and you can do work on their behalf including:
 - Requesting a Benefits Look Up
 - Completing the Benefits Summary and
 - Completing a Benefits Planning Decision Guide

B. Setting up a MyDB101 Account with a consumer

- Go to www.mn.db101.org, click on “Register” on the top right corner
- Have the person enter (or enter for them) their email address and make up a password
- Choose “None of these” for the Organization and click “Submit”
- Help the person keep track of their user name and password (have them enter in their password app on their phone, write it down in a safe place, keep it in their case file, etc.)

C. Collecting Benefit Information

Requesting a BPQY

- In the metro area (Bloomington, Brooklyn Center, Minneapolis, St. Paul) VR or VR/IL staff fax releases to:
 - Joani Werner, AWIC: 651-290-3811
- In out-state areas VR or VR/IL staff fax releases to the local SSA office:
 - Alexandria: 320-762-2726
 - Austin: 507-437-8681
 - Bemidji: 218-759-9107
 - Brainerd: 218-825--9401
 - Duluth: 218-727-9301
 - Fairmont: 507-238-4794
 - Hibbing: 218-263-9221
 - Mankato: 507-387-4509
 - Marshall : 507-532-2525
 - Rochester: 507-285-0315
 - St. Cloud: 320-252-7870

- Winona: 507-452-3042
 - Fargo 701-239-5474
 - Fergus Falls 218-739-5475
 - Jamestown 701-251-1511
 - Grand Forks 701-772-8622
 - Sioux Falls 605-330-4633
 - Watertown 605-886-9162
 - Yankton 605-665-8087
- Include cover sheet with “Release is for a BPQY for the SSDI Project” noted
 - Put return fax # on cover sheet and release
 - Put your name on the release
- The request will generally be processed within two working days.
 - One copy of the BPQY will be mailed or faxed to you and a copy will be mailed to the person or rep payee at the address on record with SSA.

Requesting a DB101 Benefit Lookup Worksheet

Helping the Person Request a Benefit Lookup Through Their Own Vault

- After they’ve registered and are logged into their DB101 account you can help the person get their own benefits information.
- They can store their benefit information in their DB101 Vault so they have it in the future.
- Click on the “My Vault” tab
- Click on “What happens to my benefits when I work?”
- Click on “Get a Benefits Lookup,” and “Request Lookup”
- Go through the info and click “Next”
- Have the person (or help the person) enter their name, date of birth and one other identifying item (address, county case number or PMI number),
- Check the box that says, “Send a copy of my results to a counselor” and enter your email address,
- Click “Next”
- The person will receive an email when the benefit lookup is done. It will also automatically show up in their Vault and your Vault. Click on the blue notification bell on the top right corner to get the information.

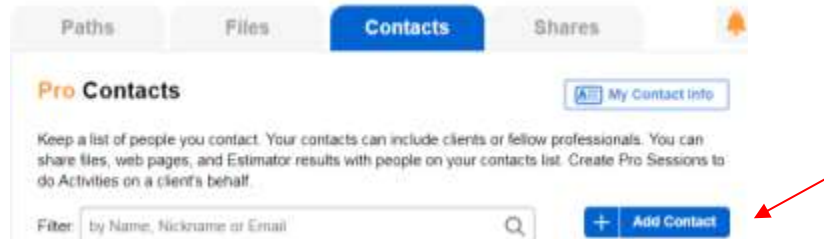
Requesting Benefit Lookup Through the Pro Vault

When you need a benefits look up you can request it on behalf of the consumer through your professional Vault account:

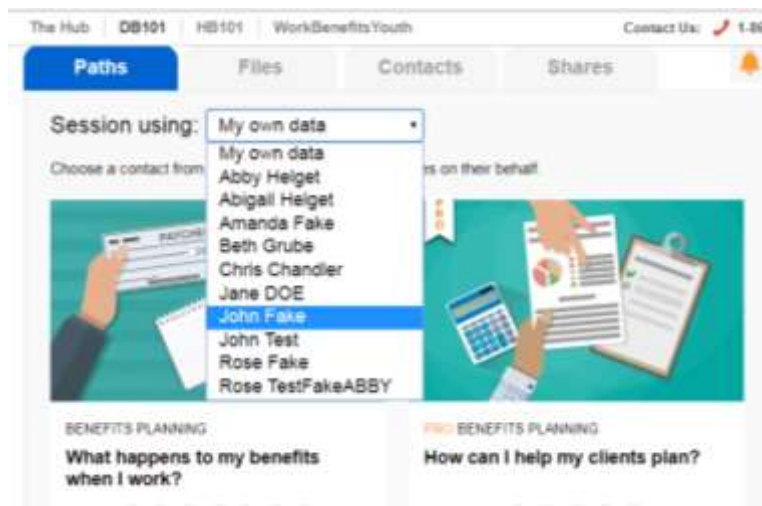
- Go to [DB101](#) and click on “My Vault” tab at the top of the page:



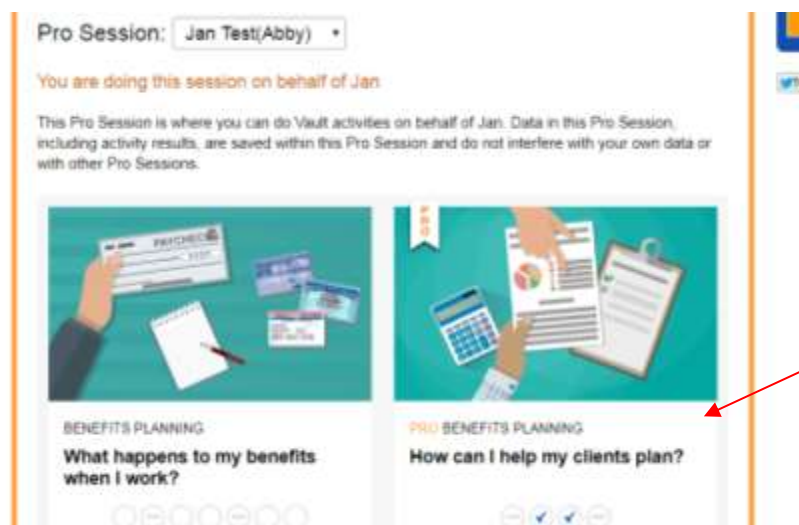
- Create their contact in your Pro Vault
 - Click on the Contacts Tab and “Add a Contact.”



- Fill out the contact information for the person you are working with and Click “Save.”
- Go back to the Paths tab in your Vault
- Choose the consumer you want to work with in the drop down menu, “Paths.”



- Once you have chosen the person you want to work with you will see an orange box around the activities. This indicates that you are now working in a Pro Session.
- Click on the Pro Benefits Planning box to begin working on behalf of the consumer



- Under the first tab “Get a Benefits Lookup,” you can now request a benefits look up on behalf of the consumer you are assisting.
 - You will need to upload the Partner Release of Information for the benefits look up to be completed.
 - A benefits lookup request will be sent to staff at the Department of Human Services and they will complete the worksheet within two business days.
 - A copy of the benefits lookup can be sent to the person you are working with as well if they have a Vault account.
 - Once the request has been fulfilled you will receive two notifications letting you know the benefits lookup is complete. One will be an email and the other is a notification in the Vault. You can find this by clicking on the bell on the top right of the Pro Vault activities.

D. Saving Favorites in DB101

- When logged onto MyDB101 you can save favorite articles or tools by clicking on the “Add to favorites” by the article or tool you want to save.



- Favorites will be shown at the bottom of each screen in the “MyDB101” section.



E. Create a Benefit Report

The Benefit Report is the deliverable for every VR referral for benefits coaching services. It is intended to be used in conjunction with the DB101 Benefits and Work Estimator Basic Report PDF, which contains the Estimator results page, and the Estimator Monthly Income and Expense pages for three months (aligning with the “Snapshot” on the Estimator results page).

Instructions for Benefit Report for Path 1 and 2

- Complete the Benefits Report for **every client referral**.
 - Share a copy of the report with the referral source (e.g., VR Counselor) and the person.
- This is a *template*. It includes all of the most common information related to benefits and work.

Be sure to:

 - Delete information or entire sections of this report that are not applicable to the client.
 - Read through the ENTIRE document before printing or sharing to make sure all template text has been removed.
- It is important to begin with a new template rather than editing one previously saved when creating a new Benefit Report.
- Use the “Find & Replace” feature to easily find the brackets [] and enter the correct information throughout the entire document. E.g., [earnings goal 1] find all and replace with the person’s actual earnings goal.
- This document has been made accessible (alt text descriptions have been added to the charts and text boxes). However, if you are working with a person who uses a screen reader or other device to help with reading/vision, it is recommended you remove the charts and text boxes and simply type the information as text in the Word document.

Section-by-section Instructions:

Cover Page “Snapshot”

- Enter the client’s name, your agency name, and your name
- Enter at least one earnings goal and fill in the snapshot information.
- Note: Best practice is to include two earnings goals, whenever possible.

Your Current Situation & Work Plans Section

- Your Current Benefits:
 - List all of the agencies you verified benefits with. Most often you will list the Department of Human Services and Social Security, but may also have others like the landlord, Veteran’s Affairs, etc.
 - Remove any agencies that are listed in the template text that you did not contact.
 - List all of the benefits you verified, and remove any of the benefits they do not get.
 - If they get a benefit you were not able to verify, include the benefit with a note that you were not able to verify it with any agency. Connect with your Hub mentor if you are not sure if you should include the benefit in the Estimator or the Report.
- Your Work Plans: Include a description of
 - Their current work, if any

- Employment services they get (including VR),
- Help they've said they need, (always include "Help understanding what happens to my benefits when I go to work."),
- Future work and earnings goal(s) you've talked about,
- By this time, you should have used the DB101 Vault "Make a Work Plan" activity to document the earnings goal in the Vault. The goal in this report and on the "Make a Work Plan" activity should be the same.

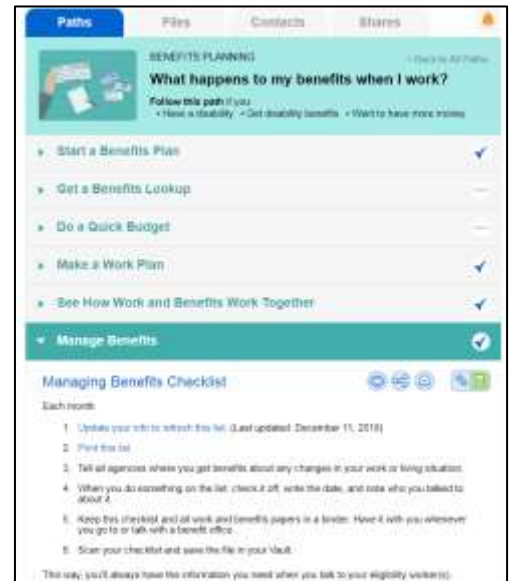
Your Cash Benefits & Work Section

- By this time, you should have completed a Benefits and Work Estimator session. Use information you get from the **DB101 Benefits & Work Estimator Session Results "Monthly Income/Expense"** tab to fill in the "impact of earnings" on each benefit.
 - Talk to your mentor if you don't understand how to read or interpret the Estimator results.
- Only include information listed in the template language. Keep it simple. If there is something important to tell them about the benefit or another benefit that might be helpful, include it in the "Important Things to Remember" section.
- You may also need to include information you get through conversation, documentation and the Vault to complete this section of the report.

Details: Monthly Income/Expense for January 2019	
Auto Body 20 hours	
Results Main Report Taxime Monthly Income/Expense Health Tips Next Steps	
← Previous Month January 2019 New Month →	
Summary Income/Expense Details Health Coverage Details	
Cash Available	
Total Income	\$2,323.96
- Total Expenses	-\$1,179.19
= Cash Available	= \$5,144.00
Total Income	
Work income	\$1,267.50
+ Cash Benefits	+ \$1,127.00
+ Refundable Tax Credits (monthly avg.)	+ \$11.52
+ Property Tax Refund/Flatten/ Credit (monthly avg.)	+ \$84.84
+ Other Unearned Income	+ \$82.00
= Total Income	= \$2,323.96
Total Expenses	
Work expenses	\$2.00
+ Taxes	+ \$83.19
+ Rent/rent	+ \$82.00
+ Recommended health expenses	+ \$249.00
= Total Expenses	= \$1,179.19

Managing Benefits & Reporting Your Income Section

- By this time, you should have complete the **Managing Benefits** activity in the Vault. Copy and paste the information from the results of that activity into this section.



Next Steps section

- Always include “Carefully review this report” and “Contact (your name) when you have a job offer, a change in hours, or a change in pay”
- Include anything the person or someone on their team needs to do in the next few weeks or months to make sure benefits are stable and/or to help move toward their work goal.
 - Examples could include scheduling meetings; applying for a benefit; contacting the Social Security claims rep or county financial worker to report a change or correct an error; or talking to their VR counselor, case manager, teacher, family or someone else about their plans.

Important Things to Remember section

List anything that is important to call out that weren’t included anywhere else in the report. This could include things details about a specific work incentive, a reminder to pay attention to other family member’s benefits, information on other programs or benefit that might be helpful, etc.

Agencies That Can Help Section

By this time, you should have completed the **Build a Benefits Planning Team** activity in the Vault. Use the information from the results of that activity to enter the agencies and individuals who can help the person reach their employment goal and/or deal with benefit issues here. Always include the Disability Hub MN and your agency.



My Contact Information Section

Enter your name, phone number and email address.

Instructions for Benefit Report for Path 3

General Instructions:

- Complete a Benefit Report for **every client referral**.
 - Write the Benefit Report, even if the person is on Path 3 of the Decision Guide and will need a full Benefit Summary and Analysis (BS&A). Use the “BS&A Required Benefit Report” template.
 - Share a copy of the report with the referral source (e.g., VR Counselor) and the person.
- The Benefit Report is a *template*. It includes all of the most common information related to benefits and work.

Be sure to:

- Delete information or entire sections of this report that are not applicable to the client.
 - Read through the ENTIRE document before printing or sharing to make sure all template text has been removed.
- It is important to begin with a new template rather than editing one previously saved when creating a new Benefit Report.
- Use the “Find & Replace” feature to easily find the brackets [] and enter the correct information throughout the entire document.
- This document has been made accessible (alt text descriptions have been added to the charts and text boxes). However, if you are working with a person who uses a screen

reader or other device to help with reading/vision, it is recommended you remove the charts and text boxes and simply type the information as text in the Word document.

Section-by-section Instructions:

Cover Page “Snapshot”

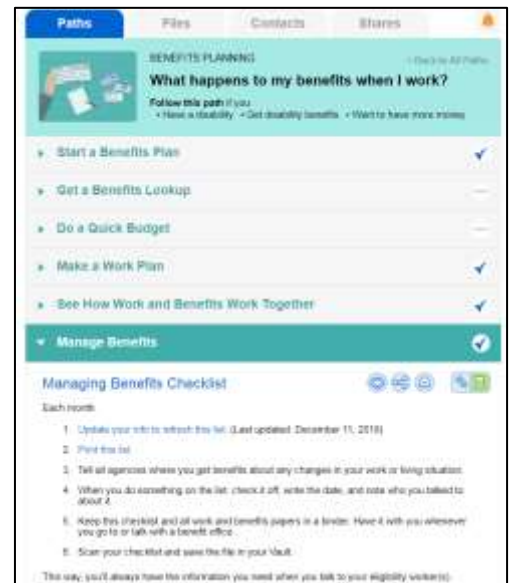
- Enter the client’s name, your agency name, and your name
- Enter the reason a BS&A is needed and the name of the Hub Work and Benefit Planner who will be writing the BS&A in the text box.

Your Current Situation & Work Plans Section

- Your Current Benefits:
 - List all of the agencies you verified benefits with. Most often you will list the Department of Human Services and Social Security, but may also have others like the landlord, Veteran’s Affairs, etc.
 - Remove any agencies that are listed in the template text that you did not contact.
 - List all of the benefits you verified, and remove any of the benefits they do not get.
 - If they get a benefit you were not able to verify, include the benefit with a note that you were not able to verify it with any agency. Connect with your Hub mentor if you are not sure if you should include the benefit in the Estimator or the Report.
- Your Work Plans: Include a description of
 - Their current work, if any
 - Employment services they get (including VR),
 - Help they’ve said they need, (always include “Help understanding what happens to my benefits when I go to work.”),
 - Future work and earnings goal(s) you’ve talked about,
 - By this time, you should have used the DB101 Vault “Make a Work Plan” activity to document the earnings goal in the Vault. The goal in this report and on the “Make a Work Plan” activity should be the same.

Managing Benefits & Reporting Your Income Section

- By this time, you should have complete the **Managing Benefits** activity in the Vault. Copy and paste the information from the results of that activity into this section.



Next Steps section

- Always include “Carefully review this report,” “Contact (your name) when you have a job offer, a change in hours, or a change in pay,” and “Schedule meeting with (Hub mentor’s name) to review BS&A” with your name listed as person responsible.
- Include anything the person or someone on their team needs to do in the next few weeks or months to make sure benefits are stable and/or to help move toward their work goal.
 - Examples could include scheduling meetings; applying for a benefit; contacting the Social Security claims rep or county financial worker to report a change or correct an error; or talking to their VR counselor, case manager, teacher, family or someone else about their plans.

Important Things to Remember section

List anything that is important to call out that weren’t included anywhere else in the report. This could include things details about a specific work incentive, a reminder to pay attention to other family member’s benefits, information on other programs or benefit that might be helpful, etc.

Agencies That Can Help Section

By this time, you should have completed the **Build a Benefits Planning Team** activity in the Vault. Use the information from the results of that activity to enter the agencies and individuals who can help the person reach their employment goal and/or deal with benefit issues here. Always include the Disability Hub MN and your agency.



My Contact Information Section

Enter your name, phone number and email address.

F. Connecting with the Disability Hub MN Work & Benefits Planners

All Options Counselors at the Hub are trained and can help with general questions about benefits and work. You can call the HUB at 1-866-333-2466 any time with general questions or chat online at DB101.org.

HUB Work and Benefit Planners are Options Counselors who are certified Community Work Incentive Coordinators (CWIC) and have a deeper level of expertise. Once you have completed the Benefits Coach certification process, you will be partnered with a Work and Benefit Planners (WBP) mentor. Your WBP mentor is available to provide technical assistance and write full **Benefit Summary and Analyses (BS&A)** for people who need them. WBP's can also help answer questions about DB101 estimator session results, complicated benefits, work incentives, and thinking through the **Benefits Planning Decision Guide** and reviewing the **Benefit Report**. They can provide case consultation and participate in meetings, as time allows (in-person, phone or video conferencing). Be sure to coordinate scheduling of meetings if you would like them to attend. When getting technical assistance from a Hub WBP, be prepared to share all information you have about the person you're working with, including:

- VR Application/Applicant Information (if available)

- Benefit Planning Query (BPQY) (required)
- Benefits Planning Decision Guide (required)
- Benefit Lookup (required)
- Financial Inventory (if available)
- Benefits Planning Summary (if available)
- Benefit Report (if available)
- Additional Releases of Information (as necessary, e.g., housing)

G. Completing & Sharing DB101 Estimator Sessions

Prior to meeting with the participant:

- Develop your DB101 session strategy in your Pro Vault based on whether someone is ready to work off benefits or is hesitant to work off benefits.
- Build out an initial estimator session with information collected in your Vault

Idea: Enter in different amounts to make sure you know what scenarios will lead to someone being better off working. Remember if someone is worse off, the Estimator will tell them what they need to do to be better off. This will help you set some initial benchmarks to try.

- When done - *Share this Session* with your assigned Work and Benefits Planner for review.
- Share completed session with participant
 - On "Your Results" page, click on "Share this Session" on the right hand of screen and follow instructions or you can share the session through the Pro Vault feature of [DB101](#)
 - Explain to the participant that they will receive a copy of the session that they can view or change
- Come back and update session(s) along the way to educate, demonstrate, or build in changes as people's goals and questions evolve

H. Related Worksheets and Forms

Name	Purpose	Who fills out
1. VR Application or Applicant Information Form	Collects information to determine eligibility for VRS services.	VR Counselor
2. Release of Information	Gives permission to get person's benefit information	VR Counselor or Benefit Coach
3. BPQY	Gives beneficiary's benefits and work history as stored in SSA's electronic records.	Social Security
4. DB101 Benefit Lookup Worksheet	Gives state benefits and other information needed to complete a DB101 Estimator Session (stored in county/DHS' electronic records)	DHS – DB101 Chat or Vault (Requested by Benefit Coach)
5. Benefits Planning Decision Guide	Determine if WBP consult or BSA needed. Initiates the BSA Development Process	Benefit Coach & WBP
6. BSA Benefit Verification	Officially starts BSA development, provides more in-depth verification of benefits to complete BSA	DHS (Requested by WBP)
7. Benefits Planning Summary	Gives information about benefits and income not provided on the BPQY or DB101 Benefit Lookup Worksheet	Benefit Coach & WBP
8. Benefit Report	Deliverable to the referral source. Pulls together information from the Benefit Summary, Benefits Lookup and estimator session (separate attachment).	Benefit Coach
9. Referral for Benefits Coaching	Requests benefits coaching services from IL/VR Benefit Coach	VR Counselor

Sample SSA 3288 - Release of Information (two required, one shown here)
(actual forms available on DB101 Partner Tab & VR Sharepoint site)

Social Security Administration Form Approved
OMB No. 0960-0566

Consent for Release of Information

You must complete all required fields. We will not honor your request unless all required fields are completed. (*signifies a required field).

TO: Social Security Administration

*My Full Name	*My Date of Birth (MM/DD/YYYY)	*My Social Security Number

I authorize the Social Security Administration to release information or records about me to:

***NAME OF PERSON OR ORGANIZATION:**

***ADDRESS OF PERSON OR ORGANIZATION:**

Minnesota Department of	
Employment and Economic Development -	
Vocational Rehabilitation Services	ATTN:

***I want this information released because:**

We may charge a fee to release information for non-program purposes.

I want to participate in benefits planning and financial self-sufficiency counseling as part of a vocational rehabilitation plan under the Ticket to Work program.

***Please release the following information selected from the list below:**

You must specify the records you are requesting by checking at least one box. We will not honor a request for "any and all records" or "my entire file." Also, we will not disclose records unless you include the applicable date ranges where requested.

1. Social Security Number
2. Current monthly Social Security benefit amount
3. Current monthly Supplemental Security Income payment amount
4. My benefit or payment amounts from date _____ to date _____
5. My Medicare entitlement from date _____ to date _____
6. Medical records from my claims folder(s) from date _____ to date _____
If you want us to release a minor child's medical records, do not use this form. Instead, contact your local Social Security office.
7. Complete medical records from my claims folder(s)
8. Other record(s) from my file (you must specify the records you are requesting, e.g., doctor report, application, determination or questionnaire)

Benefits Planning Query - cash benefits, health insurance, medical review dates, SSDI and SSI work activity and earnings.

I am the individual, to whom the requested information or record applies, or the parent or legal guardian of a minor, or the legal guardian of a legally incompetent adult. I declare under penalty of perjury (28 CFR § 18.41(d)(2004)) that I have examined all the information on this form, and any accompanying statements or forms, and it is true and correct to the best of my knowledge. I understand that anyone who knowingly or willfully seeks or obtains access to records about another person under false pretenses is punishable by a fine of up to \$5,000. I also understand that I must pay all applicable fees for requesting information for a non-program-related purpose.

*Signature: _____ *Date: _____

*Address: _____

Relationship (if not the subject of the record): _____ *Daytime Phone: _____

Witnesses must sign this form ONLY if the above signature is by mark (X). If signed by mark (X), two witnesses to the signing who know the signee must sign below and provide their full addresses. Please print the signee's name next to the mark (X) on the signature line above.

1. Signature of witness	2. Signature of witness
Address (Number and street, City, State, and Zip Code)	Address (Number and street, City, State, and Zip Code)

Sample Partner Release of Information (two pages)

(actual form available on DB101 Partner Tab & VR Sharepoint site)

Authorization to Release/Obtain Private Information with Partners Providing Benefits Planning

Vocational Rehabilitation Services is asking for your okay - your permission - to give and/or exchange information about you to the agencies listed on this form. We can't release information without your permission. This form explains what we want to release or exchange and why we want to release or exchange it. You have the right to look at this information before you give your permission to release it. Talk to your counselor if you want to look at the information.

Name:

I give my okay - my consent - to the following agencies to exchange information about me to provide benefits and financial planning services for me:

Vocational Rehabilitation Services

Minnesota Department of Human Services

Disability Hub MN– Southeastern Minnesota Center for Independent Living

Disability Hub MN – Metropolitan Center for Independent Living

Center for Independent Living (initial the local Center that will be providing services):

_____ ACCESS NORTH Center for Independent Living of Northeastern Minnesota (CILNM)

_____ Freedom Resource Center for Independent Living

_____ Independent Lifestyles, Inc. – A Center for Independent Living (ILICIL)

_____ Metropolitan Center for Independent Living (MCIL)

_____ OPTIONS Interstate Resource Center for Independent Living

_____ Southeastern Minnesota Center for Independent Living (SEMCI)

_____ Southern Minnesota Independent Living Enterprises and Services (SMILES)

_____ Southwestern Center for Independent Living (SWCIL)

Sample Partner Release of Information (page 2)

MINNESOTA DEPARTMENT OF EMPLOYMENT AND ECONOMIC DEVELOPMENT
Vocational Rehabilitation Services

Information to be exchanged verbally or in writing (initial all that apply):

____ Name
 ____ Social Security number (SSN: []-[]-[])
 ____ Social Security benefits
 ____ Other public benefits such as food support, housing assistance
 ____ SSA medical review dates
 ____ Public health benefits
 ____ Date of Birth ([]) (Month, Day, Year)
 ____ Other (please specify): [] _____

Reason for Disclosure: Your financial specialist needs to know the type and amounts of benefits you receive in order to provide you with accurate information about Social Security work incentives, and how earned income will impact your public benefits. Vocational Rehabilitation Services has contracted with the regional Centers for Independent Living and the Disability Linkage Line to help provide Social Security beneficiaries with this information.

Vocational Rehabilitation may use an internet-based program called *Disability Benefits 101* to verify your benefits and to show you how various levels of income will impact your public benefits. This program is operated by the Minnesota Department of Human Services and the Disability Linkage Line.

Expiration: I understand I may withdraw or amend my authorization to release/exchange information at any time by notifying Vocational Rehabilitation Services of my desire to do so. This consent expires when my vocational rehabilitation services end.

Re-disclosure Notice: I understand that the information disclosed through this authorization may not be re-disclosed by Vocational Rehabilitation Services without my informed written consent. If I give my consent the information may no longer be protected by federal privacy standards.

You do not have to sign this form. If you don't, Vocational Rehabilitation Services may not be able to get the information needed to provide you with accurate information on how income will impact your public benefits.

Your Signature: _____ Date: [] _____

 Parent/Guardian/Conservator/Authorized Representative, if needed Date: [] _____

Benefits Planning Query (BPQY) Sample (First page only)

(Requested by VR or Benefit Coach. Shared with WBP.)

Benefits Planning Query (BPQY)		
Confidential Social Security Data		
NAME: EMILY CLAIMANT		SSN: XXX-XX-1234
	Social Security Disability Insurance (SSDI)	Supplemental Security Income (SSI)
RECORD	See Below	See Below
<u>CASH</u>		
Type of Benefit	Disabled Worker	Disabled Individual
Current Status	Current Pay	Current Pay
Statutory Blindness	No	No
Date of Disability Onset	07/02	05/99
Date of Entitlement	12/02	05/99
Full Amount	\$292.70	\$331.00
Net Amount	\$292.70	\$331.00
Others Paid on this Record	No	No
Total Family Cash Benefit	\$292.70	Not Applicable
Overpayment Balance	\$0.00	\$0.00
Monthly Amount Withheld	\$0.00	\$0.00

DB101 Benefits Lookup (Pro Vault)

(Requested by Benefit Coach, completed by DHS.)

▼ Get a Benefits Lookup

Your Current Benefits

State records say these are your current benefits as of February 21, 2018.

Customer Information

First name	Last name
<u>Rose</u>	<u>TestFakeABBY</u>

Current Income

Current Reported Earnings	\$	<u> </u>
SSDI (Social Security Disability Insurance)	\$	<u> 200</u>
SSI (Supplemental Security Income)	\$	<u> 327</u>
MSA (Minnesota Supplemental Aid)	\$	<u> 81</u>
DAC (Disabled Adult Child)	\$	<u> </u>
Child Social Security Benefit	\$	<u> </u>
General Assistance (GA)	\$	<u> </u>
SNAP	\$	<u> 115</u>
MFIP	\$	<u> </u>
Workers' Comp	\$	<u> </u>
Other Unearned Income	\$	<u> </u>

Current Health Coverage

Free Medical Assistance (MA)

MA with a spenddown

MA-EPD

MA-TEFRA

MinnesotaCare

Medicare

Other Benefits

PASS (Plan to Achieve Self-Support)

Housing Support (formerly Group Residential Housing) benefits

Services paid for by Housing Support

Comments

 PAY CLOSE ATTENTION HERE

QMB and private health insurance through Blue Cross/Blue Shield.

See a mistake? Call [Disability Hub MN](#) at 1-866-333-2466.

What next? Share your [Benefits Lookup Report](#) with your county worker, counselor, or anybody else who needs to know about your benefits.

How might a job affect your benefits? Try a [Benefits Planning Estimator](#). The Estimator will start off using these real-life benefits.

Benefits Planning Summary (3 screens; Basics, Work and Health)

(Completed by Benefit Coach with follow-up by WBP. Available on DB101 Partners Tab)

▼ Benefits Planning Summary
⋮

Benefits Planning Summary 🏠

The goal of the Benefits Planning Summary is to collect information about a person that is not collected in other Vault activities.

Answer all of the questions and note the primary source of information for each section.

Personal Information

Basic Information

Main source of basic information: *

Person

WBP

VR Applicant Info

Address:

Street:

City:

State:

Zip:

 ?

Citizenship Status: ?

US Citizen

Qualified Alien

Other legal resident

Undocumented or non-immigrant

Disability Status: ?

Yes. I have a disability determination.

Yes. I have been determined blind.

Not yet. I am waiting for SSA or the state to decide.

... I do not have a disability.

Determining Agency:

- Social Security
- SMRT



Household Information

Main source of household information: *

- Person
- BPQY

Living Situation:

- Group home/Foster care/Board and Lodge
- Shared home (roommates)
- My own place
- Someone else's place



Living expenses:

- Pays fair share of household expenses
- Pays monthly rent:
- Gets a rent subsidy:
- Pays a monthly mortgage:



Marital status:

- Never married
- Married, living with spouse
- Married living apart
- Legally separated
- Divorced
- Widowed
- Biological or adopted children under age 18?

Supports

Main source of supports information: *

- Person
- BPQY
- WBP

- Is a veteran
- Has a social worker
- Has a financial worker
- Has a guardian or rep payee

These 4 expand when clicked allowing the support person's contact information to be entered.

Other agencies the person currently works with (check all that apply):

- American Indian VR services
- Centers for Independent Living
- Child Protective Services
- Community Rehabilitation Program
- Consumer organ/Advocacy group
- Corrections
- Education - High School
- Education - Post Secondary School
- Employer
- Employment Network (TTW)
- Medical provider
- Mental health provider
- Public Housing Authority
- School financial aid
- Social Security Administration
- Veterans' Administration
- Workforce Center
- Workers Compensation
- Other

Benefits Planning Summary



Work



Work History

Main source of work history information: *

- Person
- BPQY
- WBP
- VR Counselor
- VR Wage Detail Report

Any work during the last year?

Any work now?

If not working, kind of work the person would like:

List past jobs. Start with the most recent job:

Name of Employer (and city, state)	Job Title	From:	To:	Hourly Wage:	Reason left
<input type="text"/>	<input type="text"/>	<input type="text"/> (mm/dd/yyyy)	<input type="text"/> (mm/dd/yyyy)	\$ <input type="text"/>	<input type="text"/>
Job details: <input type="text"/>					
<input type="text"/>	<input type="text"/>	<input type="text"/> (mm/dd/yyyy)	<input type="text"/> (mm/dd/yyyy)	\$ <input type="text"/>	<input type="text"/>
Job details: <input type="text"/>					
<input type="text"/>	<input type="text"/>	<input type="text"/> (mm/dd/yyyy)	<input type="text"/> (mm/dd/yyyy)	\$ <input type="text"/>	<input type="text"/>
Job details: <input type="text"/>					
<input type="text"/>	<input type="text"/>	<input type="text"/> (mm/dd/yyyy)	<input type="text"/> (mm/dd/yyyy)	\$ <input type="text"/>	<input type="text"/>

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		 (mm/dd/yyyy)	 (mm/dd/yyyy)		
Job details: <input type="text"/>					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
		 (mm/dd/yyyy)	 (mm/dd/yyyy)		
Job details: <input type="text"/>					

Work and Benefits

Main source of work and benefits information: *

- Person
- BPQY

Comfort with benefits changing while working:

- Fearful of benefit changes when working. Does not want to disrupt or work off cash benefits.
- Cautious about benefit changes when working. Wants to work and keep cash benefits.
- No major concerns about benefit changes when working. May consider working off cash benefits.
- Wants to work off cash benefits.

Possible work incentives:

- Any Impairment Related Work Expenses (IRWE) expected once employed?
- Any other work-related expenses expected once working?
- PASS: Any major costs to achieve employment that might make a good Plan to Achieve Self-Support (PASS)?
- Subsidy: Any extra help needed or lower production on the job?

Note any questions, concerns, and comments related to benefits and work

Basics

Work

Health

Next »

Health Coverage and Unearned Income

**Health Coverage**

Main source of health coverage information: *

 Person BPQY WBP Has Medicare

Frequency of use of Part A:

 Weekly Monthly Quarterly Yearly Rarely

Frequency of use of Part B:

 Weekly Monthly Quarterly Yearly Rarely

Frequency of use of Part D:

 Weekly Monthly Quarterly Yearly Rarely Has Medical Assistance (MA)

Frequency of use of MA:

 Weekly Monthly Quarterly

Monthly

Quarterly

Yearly

Rarely

Types of MA services used:

VA health coverage



Parent's employer health coverage



Tribal health coverage

MNsure plan



MinnesotaCare



Spouse's employer-sponsored health coverage

Individual's own employer health coverage



Other health coverage

Unearned Income (Other than SSI, Title II, and state benefits)

Main source of other income information:

Person

BPQY

Include other unearned income the person gets, but *don't include SSI, Title II (SSDI) or state benefits*

Unemployment Insurance

Private short-term and long-term disability insurance

Spousal support

Energy Assistance

VA Pension or Compensation

Other:

Note: SSI, Title II, and state benefits should be documented separately with a Benefits Lookup (BLU).

Basics

Work

Health



Next: Results

Benefits Planning Decision Guide (Pro Vault)

(Completed by Benefit Coach and send to the WBP. Included in referral to WBP)

Benefits Planning Decision Guide
☰

Benefits Planning Decision Guide

🏠

The Benefits Planning Decision Guide helps you see whether you need input from a Work and Benefits Planner (WBP) about a person's situation. If so, it can help figure out what technical assistance the WBP can offer, including whether to do a Benefits Summary & Analysis (BSA). If not, the Decision Guide may recommend you do a Benefits and Work Estimator session with the person you're helping.

Answer all of the following questions about the person you are working with and indicate where you got that information.

Does the person...	How determined
<input type="checkbox"/> Get Title II Disability <i>and</i> have TWP- or SGA-level work not yet reviewed by SSA?	: <input type="radio"/> BPQY <input type="radio"/> Wage Data <input type="radio"/> DHS BLU <input type="radio"/> Other:
<input type="checkbox"/> Have interest in creating a PASS?	: <input type="radio"/> Person <input type="radio"/> DHS BLU
<input type="checkbox"/> Have possible SGA-level work within 12 months of disability onset?	: <input type="radio"/> BPQY <input type="radio"/> Wage Data <input type="radio"/> WBP <input type="radio"/> DHS BLU <input type="radio"/> Other:
<input type="checkbox"/> Want to proactively use work incentives (IRWE/Subsidy for Title II Disability or SEIE/IRWE/BWE for SSI)?	: <input type="radio"/> Person <input type="radio"/> DHS BLU
<input type="checkbox"/> Have Title II Disability or SSI overpayment due to earnings?	: <input type="radio"/> BPQY <input type="radio"/> WBP <input type="radio"/> DHS BLU

	<input type="radio"/> DHS <input type="radio"/> BLU <input type="radio"/> Other:
<input type="checkbox"/> Have child support deductions, garnishment, or overpayments for other benefits (like MFIP, GA, Housing Support, SNAP, etc.)?	: <input type="radio"/> BPQY <input type="radio"/> WBP <input type="radio"/> DHS <input type="radio"/> BLU <input type="radio"/> Other:
<input type="checkbox"/> Have actual or potential DAC, Pickle, or DWB disregard for MA purposes?	: <input type="radio"/> BPQY <input type="radio"/> WBP <input type="radio"/> DHS <input type="radio"/> BLU <input type="radio"/> Other:
<input type="checkbox"/> Have subsidized housing, or housing costs that haven't been verified?	: <input type="radio"/> Hsg. Auth. <input type="radio"/> WBP <input type="radio"/> DHS <input type="radio"/> BLU <input type="radio"/> Other:
<input type="checkbox"/> Have dependents drawing off his/her record?	: <input type="radio"/> BPQY <input type="radio"/> WBP <input type="radio"/> DHS <input type="radio"/> BLU <input type="radio"/> Other:
<input type="checkbox"/> Have family members who get need-based benefits (like MFIP, MA, SNAP, etc.)?	: <input type="radio"/> BPQY <input type="radio"/> WBP <input type="radio"/> DHS <input type="radio"/> BLU <input type="radio"/> Other:
<input type="checkbox"/> Is nearing early-retirement age or full-retirement age (generally 60 or older)?	: <input type="radio"/> Date of Birth

Have family members who get need-based benefits (like MFIP, MA, SNAP, etc.)? :

- BPQY
- WBP
- DHS
BLU
- Other:

Is nearing early-retirement age or full-retirement age (generally 60 or older)? :

- Date
of Birth
- SSA
Letter
- DHS
BLU
- Other:

Have benefits not covered by the Estimator (like Unemployment Insurance, Workers' Compensation, VA Pension, Long-term Disability Benefit, Housing Support service rate, MFIP, etc.)? :

- BPQY
- WBP
- Other:

Currently have a PASS? :

- BPQY
- WBP
- Other:

Have dual Title II entitlement (e.g. SSDI on own record DAC) *and* is TWP/EPE for each claim on different timelines *and* is planning to earn above the TWP level? :

- BPQY
- WBP
- Other:

Is in the Initial Reinstatement Period (IRP)? :

- BPQY
- Other:

Have Title II Disability *and* have a self-employment goal with project profits of \$500/month or more? :

- Person
- BPQY



Start Over



Next: Results

Have dependents drawing off his/her record?	No
Have family members who get need-based benefits (like MFIP, MA, SNAP, etc.)?	No
Is nearing early-retirement age or full-retirement age (generally 60 or older)?	No
Have benefits not covered by the Estimator (like Unemployment Insurance, Workers' Compensation, VA Pension, Long-term Disability Benefit, Housing Support service rate, MFIP, etc.)	No
Currently have a PASS?	No
Have dual Title II entitlement (e.g. SSDI on own record DAC) <i>and</i> is TWP/EPE for each claim on different timelines <i>and</i> is planning to earn above the TWP level?	No
Is in the Initial Reinstatement Period (IRP)?	No
Have Title II Disability <i>and</i> have a self-employment goal with project profits of \$500/month or more?	No

Next Step

Do a DB101 Benefits and Work Estimator Session with the person you are helping.

If you are in doubt, it is always best to consult a Work and Benefits Planner and work together to figure out which path is best for the person. If you decide to do so, use the DB101 Vault to share the following files about the person with the Work and Benefits Planner:

Use the DB101 Vault to share the following files about the person with the Work and Benefits Planner:

- A release of information (ROI) signed by the person you are helping.
- These Benefits Planning Decision Guide results.
- A Benefits Lookup Worksheet (BLU).
- The Benefits Planning Summary worksheet
- A Benefits Planning Query (BPQY) from Social Security.
- Results from any relevant Benefits and Work Estimator session which you have already completed.
- The Vocational Rehabilitation (VR) Application.
- The VR Applicant Information sheet.

How to: Share each file, one by one, from the Pro Session you created for the person you're helping. You can access it by using the Vault's Contacts tab and viewing the person's contact information. If there are any files missing, you can upload them by clicking the Pro Session's documents icon.



Change My Answers



Next Activity

Referral for Benefits Coaching Services (page 1)

(Completed by VR Counselor, sent to Benefit Coach. Available on DB101 Partner Tab)

BENEFITS COACHING REFERRAL

DATE OF REFERRAL: ____/____/____

CUSTOMER NAME: _____ DATE OF BIRTH: ____/____/____

PHONE NUMBER: (____) _____ ADDRESS: _____

DISABILITY: _____

GUARDIAN NAME: _____ PHONE: (____) _____

REP PAYEE NAME: _____ PHONE: (____) _____

REFERRING VR STAFF: _____ PHONE: (____) _____

EMAIL: _____@STATE.MN.US

WORK GOAL

TYPE OF WORK DESIRED: _____ SELF-EMPLOYMENT? YES NO

RATE OF PAY: \$ _____ PER _____ NUMBER OF HOURS/WEEK: _____

EMPLOYMENT STATUS: CURRENTLY WORKING* START DATE: ____/____/____

HAS JOB OFFER; EXPECTED START DATE WITHIN A MONTH*: ____/____/____

EMPLOYMENT EXPECTED WITHIN A MONTH BUT NO JOB OFFER

HAS A JOB IN MIND, BUT NO JOB OFFER

INTERESTED IN WORKING BUT NO JOB IN MIND

*PRIORITY WILL BE GIVEN TO PEOPLE CURRENTLY WORKING AND PEOPLE WITH CURRENT JOB OFFERS.

HUB General Number: 1-866-333-2466

HUB Work & Benefits Planners

Name	Office Location	Contact
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