To begin looking at a framework for major practice domains within the arena of benefits planning and assistance Cornell University’s Program on Employment and Disability convened a workgroup of leading national experts in the field to outline an initial framework and set of associated knowledge areas and job functions. The work group identified several primary practice domains or function categories including:

- Outreach;
- Information and referral;
- Data collection and profiling;
- Benefits analysis;
- Scenario advisement and counsel;
- Support planning; and,
- Benefits assistance.

These domains within the BPA&O construct continue to be refined. For example, the Institute on Rehabilitation Issues convened by the Rehabilitation Services Administration as coordinated by the University of Wisconsin-Stout is currently addressing the implications of benefits planning and assistance on the roles of rehabilitation counselors. This Institute, comprised of experts from the Social Security Administration, Rehabilitation Services Administration, state vocational rehabilitation agencies, specific universities, and private service providers, initially seems to further support the flexibility of a service delivery construct that provides for easy access and delivery of services and supports from a broad array of practitioners based on the inherent capacities of these practitioners to deliver specific services.

Virginia Commonwealth University, worked with state projects in Federal Region V to further refine a taxonomy of benefits planning and assistance services that included five service categories: information and referral; problem-solving and advocacy; benefits counseling; long-term benefits assistance; and follow-up services. These service categories and stemming definitions were based largely on the work of the Minnesota and Wisconsin state partnership initiatives.
Introduction

Benefits Planning, Assistance and Outreach

Construct

Information and Referral
Marketing
Systems Intervention
Training

Proactive Benefits Monitoring
and Follow-Up
Support Planning
Benefits Assistance
Long-Term Intervention

Information Gathering, Profiling and Analysis
Problem Solving and Advocacy
Advisement and Counsel
Short-Term Intervention
Benefits Planning

Information Gathering, Profiling, Analysis and Advisement: An important first step in the benefits planning process is that of information gathering and profiling. Inevitably, at some point, a request for support will come in pertaining to an individual’s benefit status. It is at this point that the benefits specialist will need to make a decision as to the complexity of the issue at hand and depth of information that will be needed to provide solid guidance. Often, requests will be short-term in nature and counsel needed provided through problem solving and advocacy. In more complex cases requiring indepth data collection, a customized profile of an individual’s personal demographics, history, benefit status, work status, and other relevant information may need to be developed which will provide a base upon which to give guidance that will support the consumer in making a decision based on their initial request. This profile is an important tool in understanding the individual’s current status so that it can be used as a springboard in proposing future alternatives and scenarios that the consumer may want to consider. Based on this and goals, aspirations, interests and support needs expressed by the individual the benefits specialist will conduct a comprehensive analysis of how the consumer’s current situation may be effected by their purported goals and changes in other variables such as income, resources, living arrangements, supports and subsidies, etc. This analysis culminates in a comprehensive summary of information collected and presents options and recommendations for the consumer’s consideration. An important element of counsel at this point is making sure the individual and their key supporters and stakeholders understand the options report generated and are provided with or connected with other resources to support them in making informed choices as to employment plan development and resulting need for benefits assistance. Counsel should result in informed choice leading to the possible development of actual employment goals.

Information and Referral: Information and referral services and supports really cut across each of the three BPA&O domains. Information may include both spoken and print materials pertaining to SSA and other federal benefit programs. This may also include information on other community rehabilitation and employment programs and federal/state resources that may be available. It is important to recognize that the benefits specialist will not be able to be all things to all people. For example, a consumer may need to access rehabilitation counseling services or special evaluative services to assist them in making an employment decision. In those types of cases, and situations where the consumer’s needs exceed the skills and expertise of the benefits specialist, referral to other community service providers or federal/state agencies for these supports may be appropriate. A comprehensive BPA&O program will have a diverse network of providers to whom they can refer.
Problem Solving and Advocacy: As requests and referrals come in for the benefits specialist, information and counsel will inevitably need to be provided. This type of support is typically classified as either short- or long-term in nature. Most problem solving and advocacy is short-term in nature and consists of questions and needs for information pertaining to eligibility for various benefit programs, utilization of work incentives, and community referral. However, in some cases there may be a need for ongoing or long-term support with problem solving and advocacy. In this type of case, these services and supports are much more of a benefits management nature that will be discussed later in this introduction.

Benefits assistance is critical for individuals who may require long-term BP&O services and supports and picks up where initial planning may end. That is, actually supporting the individual in establishing a plan and developing long-term supports that may be needed to ensure success.

Support Planning: Whether deciding to prepare for employment, attach to work, maintain employment, or advance in work, planning is a core function of a benefit specialist’s duties. It requires the practitioner to be skilled in existing service plan delivery mechanisms and understand how each is designed, implemented, and evaluated across an array of systems. For example, transition-aged youth may often have an Individual Education Program (IEP) and an Individual Transition Plan (ITP) that provides a mechanism by which management goals may become a part of the child’s education program. Individuals currently in the vocational rehabilitation system may have an Individual Plan for Employment (IPE) or individuals in the mental retardation / developmental disabilities system may have an Individual Service Plan (ISP) both of which provide additional mechanisms for integrating benefits management and long-term support into existing service delivery constructs. Should the individual not be attached to a current service delivery system or goals not be appropriate to integrate into existing service delivery plan, the practitioner may need to consider the development of a benefits support plan that outlines support areas, activities, responsibilities, timeframes, and criteria/indicators for successful outcomes.

Benefits assistance: Proactive benefits monitoring is the key to success at this level of support potentially focusing on regular intermittent contact with individuals, consistent communication, crisis management, information and referral, problem solving and advocacy, and assistance with management of the individual’s benefit status. Benefits assistance is known by the long-term nature of services and supports needed by the consumer that may include ongoing data collection, analysis, counsel, and benefits reporting.

Follow-Up: In many cases, some individuals may not need benefits assistance, but rather intermittent spot-checking to maintain their financial well being. Proactive benefits monitoring may also serve as a key to success at this level of support as well.