Refer to Chapter One for a guide to completing this assessment and further definition of specific activities, supports, or services.

Benefits Planning and Assistance Self-Assessment Checklist

Activity/Service/Support: Conduct outreach to key stakeholders
Provided: 
Referral Available: 
Expertise Evident: 
Needs Development: 
Frequency: 
Duration: 

Activity/Service/Support: Information sharing on SSA-related issues with stakeholder groups
Provided: 
Referral Available: 
Expertise Evident: 
Needs Development: 
Frequency: 
Duration: 

OUTREACH
Activity/Service/Support: Identify individuals and cultivate SSA-related expertise to expand network
  Provided:
  Referral Available:
  Expertise Evident:
  Needs Development:
  Frequency:
  Duration:

Activity/Service/Support: Establish collaborative relationships with relevant agencies and organizations
  Provided:
  Referral Available:
  Expertise Evident:
  Needs Development:
  Frequency:
  Duration:

Activity/Service/Support: Market services and supports among external stakeholders and process owners
  Provided:
  Referral Available:
  Expertise Evident:
  Needs Development:
  Frequency:
  Duration:
Activity/Service/Support: Negotiate aspects / purpose of referral
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Contract and monitor services and supports with outside vendors
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other ________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Appendix J  Benefits Planning, Assistance and Outreach

Activity/Service/Support: Other

Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

INFORMATION AND REFERRAL

Activity/Service/Support: Outline specific services and supports that can be provided
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Establish a referral network of practitioners
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Refer for additional needed services and supports as appropriate
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Refer for protection and advocacy
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Monitor case status
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Ensure confidentiality of information
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Provide short-term technical assistance and training
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Share information regarding SSA-related issues across stakeholder groups
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Other:________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other:________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

COUNSELING

Activity/Service/Support: Utilize array of data collection and information gathering strategies
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Formulate effective questions and probing for information
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Verify / triangulate information collected
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Facilitate person-focused planning
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
**Activity/Service/Support:** Define roles, responsibilities, and counseling functions/supports needed

**Provided:**

**Referral Available:**

**Expertise Evident:**

**Needs Development:**

**Frequency:**

**Duration:**

**Activity/Service/Support:** Create supportive environment and build rapport and trust

**Provided:**

**Referral Available:**

**Expertise Evident:**

**Needs Development:**

**Frequency:**

**Duration:**

**Activity/Service/Support:** Network customers for assistance with employment planning, career development, disability adjustment or other specialized counseling areas

**Provided:**

**Referral Available:**

**Expertise Evident:**

**Needs Development:**

**Frequency:**

**Duration:**
Activity/Service/Support: Use repertoire of general counseling skills as needed including
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other:________________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other:________________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
DATA COLLECTION

Activity/Service/Support: Conduct critical interviewing
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Identify and document personal demographics
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Collect and describe information pertaining to individual’s disability
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Develop profile of individual’s financial / benefit status
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Assess and identify current work status
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Identify current attachment to service delivery systems
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Identify other critical stakeholders
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Compile information into a comprehensive profile
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other:_____________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Other: ______________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

BENEFITS ANALYSIS

Activity/Service/Support: Review stated employment goals and/or request for short-term technical assistance or education
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Conduct analysis of information contained in the benefits profile or information requested
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Apply different benefit scenarios to study impact and effect of future earnings on benefit status
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Identify long-term benefit planning and assistance support an individual may need
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Identify existing service delivery systems and plans in which long-term benefits planning and assistance supports can be incorporated
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Appendix J  Benefits Planning, Assistance and Outreach

**Activity/Service/Support:** Explore individual’s past success/failure in self-managing benefits
**Provided:**
**Referral Available:**
**Expertise Evident:**
**Needs Development:**
**Frequency:**
**Duration:**

**Activity/Service/Support:** Identify needed safety nets to minimize risk and fears
**Provided:**
**Referral Available:**
**Expertise Evident:**
**Needs Development:**
**Frequency:**
**Duration:**

**Activity/Service/Support:** Evaluate services and supports provided across each primary domain considering information obtained to continuously improve deliverables
**Provided:**
**Referral Available:**
**Expertise Evident:**
**Needs Development:**
**Frequency:**
**Duration:**
Activity/Service/Support: Other: ____________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other: ____________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

SCENARIO ADVISEMENT

Activity/Service/Support: Provide short-term technical assistance pertaining to specific scenarios being explored
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Provide education and training as requested
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Disseminate print information as requested
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Develop a comprehensive report for consideration as part of the career development and employment process
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Recommend long-term benefit planning and assistance support an individual may need
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Show how benefits planning and assistance supports can be infused within existing service delivery systems and plans
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Develop and/or recommend self-management tools and strategies for managing benefits
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Recommend potential safety nets to minimize risk and fears
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Support the individual and their key stakeholders in understanding the report and defining next steps
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Provide counseling support to assist the individual in making an informed choice as to options and goals to pursue
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Inform the individual, their key stakeholders and their support teams as to touch points they will need to be sensitive to

Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other: ____________________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other: ____________________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Assist the individual, their key stakeholders, and their support teams in making informed choices and establishing goals

Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Evaluate and understand the array of service delivery plans that may be intersecting and dissecting the individual’s life and provide assistance in incorporating benefits management goals

Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Ensure that a comprehensive support / employment plan has been developed

Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Maintain case recording and documentation
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Negotiate conflict and establish mutual gains
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Assess, evaluate and inform on touch point issues regarding SSI
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Continue to inform the individual, their key stakeholders and their support teams as to touch points
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Manage case load responsibilities
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Monitor case progress
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:
Activity/Service/Support: Evaluate effectiveness of services and supports provided
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other:__________________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration:

Activity/Service/Support: Other:__________________________________________
Provided:
Referral Available:
Expertise Evident:
Needs Development:
Frequency:
Duration: