Appendix A —

**JOB DESCRIPTION: BENEFITS SPECIALIST**

**Purpose**: This position will provide benefits planning, assistance and outreach and management support to SSA beneficiaries and recipients with disabilities who are exploring career development, and/or pursuit, maintenance or advancement of employment. The benefits specialist collects data on individual’s current benefit status, provides critical analysis of impact of work and earnings on these benefits, and makes recommendations to the individual and other stakeholders in their life as to safety nets and benefit management plans that should be put into place as the individual develops a plan for employment. This specialist integrates benefit support plans into existing service delivery constructs to ensure continuity of the employment planning and benefits advisement and management process.

**Supervision**: Individual benefits specialists are supervised in accordance with the human resources policy and procedures maintained by the agency/organization they are employed with. Outputs of work should be supervised and evaluated by an individual with an understanding of the complexity of the position. In addition, to ensure the continuous quality improvement of services and supports provided, the specialist regularly seeks customer feedback.

**Major Responsibilities:**

**Network Building / Outreach:**

- Conducts outreach to key stakeholders including: individuals with disabilities; their families, advocates and providers; and employment networks
- Shares information regarding SSA disability/return to work programs and work incentive provisions across stakeholder groups
- Identifies individuals and cultivates SSA-related expertise to expand network of advisement and management supports available in a specific geographic location
- Establish collaborative relationships with relevant agencies and organizations to gain knowledge and access to ongoing information and support
- Maintains strategic plan for outreach and marketing

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1 Note: An individual may not perform these duties on a full-time basis. In fact, often the supports and services outlined within this description are frequently provided as part of the responsibilities of another job classification. For example, job coaches often report between 5-20% of their time being devoted to delivery of services and supports outlined within this description. The same for individuals classified within school districts as transition planners.
Benefits Planning:

- Identifies and documents personal demographics
- Profiles individual’s benefit status including:
  - type and amounts of benefits (SSI or SSDI);
  - types and amounts of unearned income (e.g. unemployment, Veteran’s Benefits, civil service, railroad retirement pension, alimony, child support, private disability insurance, worker’s compensation, etc.);
  - types and amounts of financial needs-based assistance (e.g. Pell Grants, TANF, food stamps, state subsidized housing, HUD, and other subsidies);
  - earned income and/or wages from self-employment;
  - health insurance status; and,
  - for SSDI, number of trial work period and extended period of eligibility months used.
- Assesses and identifies current work status including:
  - supports and subsidy provided;
  - past/present service providers;
  - work history and references; and,
  - history of impact of work on benefits in the past.
- Conducts analysis of forementioned
- Applies different benefit scenarios to study impact and effect of future earnings on benefit status
- Develops report highlighting and outlining options and recommendations for consideration as part of the career development and employment process
- Supports the individual, their key stakeholders, and supporters in understanding the report and defining next steps for both the individual being served and the benefits advisor

If deemed appropriate and needed:

- Assists the individual, their key stakeholders, and their support teams in making informed choices and establishing both employment-related goals as well as needed benefits management supports

Benefits Assistance:

- Evaluates and understands the array of service delivery plans that may be intersecting and dissecting the individual’s life and assists the individual, the key stakeholders and the employment coordination team in incorporating benefits management goals and objectives into existing service delivery planning constructs (e.g. Individualized Education Program, Individual Plan for Employment, Individual Service Plan, etc.)
- Informs the individual, their key stakeholders and their support teams as to touch points they will need to be sensitive to in regard to reporting, reviews, redeterminations, documentation and other areas
- Ensures that a comprehensive plan has been developed that identifies:
  - supports/activities needed;
  - time frames
• Provides or identifies providers of proactive benefits management and monitoring including, but not limited to:
  – intermittent wellness visits (every 3-6 months as prescribed by team);
  – regular ongoing communication via phone, letter, e-mail, etc…;
  – updating knowledge and information sharing of impact of new policies on benefit and employment status;
  – provision of crisis management supports;
  – information and referral; and,
  – problem solving and advocacy.
• Assesses, evaluates and informs on touch point issues regarding SSI including, but not limited to:
  – age 18 redetermination and possible shifts to either SSI as an adult, SSDI/DAC, denial of continued benefits or continuation of benefits if enrolled in an approved vocational rehabilitation program;
  – 1619(b);
  – increase in earned and unearned income;
  – increase in resources;
  – marital status;
  – living arrangements;
  – in-kind supports;
  – over and underpayment;
  – continuing disability review; and,
  – use of work incentives.
• Assesses, evaluates and informs on touch point issues regarding SSDI including, but not limited to:
  – trial work period;
  – extended period of eligibility and grace period;
  – continuing disability review;
  – extended Medicare coverage; and,
  – loss of job.

Qualifications: Must possess excellent written and oral communication, interpersonal, problem solving, organizational skills, mathematical calculation proficiency, and like working with people. Knowledge of vocational rehabilitation, employment and training is preferred; Bilingual/bicultural helpful. Individuals who have experience as consumers of disability-related services and in providing peer counseling, advocacy and support are encouraged to apply.
Purpose: Advocate - Protection and Advocacy for Beneficiaries of Social Security (PABSS)

Supervision: PABSS Unit Director

Scope: This is a professional position responsible for the provision of services to Social Security Disability Insurance and Supplemental Security Income beneficiaries with disabilities who want to secure or retain employment and need services and assistance to allow them to work.

This position will:

1. Provide information and referral to beneficiaries with disabilities about work incentives and employment, including information on the types of services and assistance that may be available to assist them in securing or regaining gainful employment;
2. Investigate and review any complaint of improper or inadequate services provided to a beneficiary with a disability by a service provider, employer or other entity involved in the beneficiary’s return to work effort;
3. Provide consultation to and legal representation on behalf of beneficiaries and disabilities when such services become necessary to protect the rights of such beneficiaries;
4. And advocate to identify and correct deficiencies in entities providing vocational rehabilitation services, employment services and other support services to beneficiaries with disabilities.

Major Responsibilities:

- Provide information, referral, and advocacy services to obtain services and supports which are commonly recognized as impacting on Social Security beneficiaries’ ability to obtain, maintain, or retain employment including ancillary supports, which may include, but is not limited to, assistance to coordinate transportation services, personal care assistants, childcare, assistive technology, and healthcare.
- Conduct timely intakes to ascertain the facts and issues of client problems, provide accurate information and counsel about individual rights and assume responsibility for the proper handling of individual casework.
- Investigate, research and prepare appropriate responses to requests for information and/or assistance in accordance with Agency program procedures.
- Assist beneficiaries in resolving disputes and differences with providers, employers, attorneys, benefits planning, assistance, and outreach (BPAO) programs, employment
networks, advocacy organizations, and other service providers/entities involved in the Social Security beneficiary’s return to work effort through alternative means of dispute resolution, including fact-finding, facilitation, good-faith negotiation, conciliation, mediation, arbitration, and any combination of procedures, that may be used to address disputes or issues that arise in their return to work efforts.

• Assist beneficiaries secure access to meaningful opportunities to prepare for employment that is consistent with their interest, preferences and capabilities.

• Endeavor to improve programs that provide services to and promote the employment of social security beneficiaries, by working with said agency and reporting/discussing problems with the Program Manager.

• Address any issues related to obtaining, maintaining, or advancing in employment, including those issues, which may interfere with the Social Security beneficiary’s ability to maintain employment.

• Address any issues of discrimination related to a Social Security beneficiary’s employment, be it in the application process or a later failure to provide reasonable accommodation, promotion, etc.

• Represent beneficiaries of Social Security in connection with their return to work efforts.

• Conduct outreach and provide education and training to social security beneficiaries to inform them of the availability of work incentives and VR service providers in both the public and private sectors who can provide them the employment and rehabilitation services they need to enter or return to the workforce.

• Maintain and disseminate resource materials.

• Monitor state/federal regulations and policies pertaining to program area and participates in regulatory advocacy.

• Maintain public contact with organizations, consumer groups, community agencies, and others for the purpose of education and training about beneficiaries of Social Security related issues and benefits and rights and laws.

• Coordinate with civil rights and human service programs that provide services to and promote employment for beneficiaries of Social Security to obtain, maintain, or retain employment, as well as work to educate employers as to Social Security beneficiaries' opportunities to obtain real jobs that pay real wages.

• Participate cooperatively in advocacy unit as part of an interdisciplinary team and participates in regular case unit staffings to review and discuss casework.

• Perform related tasks consistent with skills and abilities and general responsibilities as may be assigned.

Qualifications:

The employee in this position must possess the following knowledge, skills and abilities in order to perform the required duties:

• Knowledge of state/federal laws, programs and issues relating to civil rights and human service programs, specifically as they correlate with the provision of PABSS services to assist beneficiaries of Social Security to obtain, maintain, or retain employment. Specialized knowledge in a disability-related field may be required.

• Sound professional judgment.
Sound reasoning skills, which will allow the employee to effectively analyze complex cases, make decisions about the proper course of action to take in cases and to advocate effectively and persuasively on behalf of beneficiaries of Social Security.

Oral and written communications skills which will allow the employee to effectively and professionally communicate with beneficiaries of Social Security and other individuals over the telephone, in writing and in person, including but not limited to, employers, governmental agencies, benefits planning, assistance, and outreach (BPAO) programs, employment networks, advocacy organizations, and other service providers/entities involved in the Social Security beneficiary’s return to work effort.

Interpersonal skills, which will allow the employee to maintain productive working relationships with all staff members and to work in an interdisciplinary team with other professionals.

Organizational skills, which will allow the employee to manage multiple priorities and tasks and allow the employee to meet self imposed and externally set deadlines.

Ability to take direction, supervision, and comply with the office policies and procedures of the Center.

Education:

- Four-year college degree in rehabilitation, social work, mental health counseling, or a related social service or education degree.
- Five years experience in advocacy or a related field. Education beyond a four-year degree can substitute for experience on a year-for-year basis, not to exceed three years.