Surviving to Thriving

Enhancing informed choices about benefits and work.

| Learn that residents can work and manage their benefits ... | ■ Attend basic benefits training  
  ■ Get resources about benefits programs (see Recommended Resource below) |
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| Discuss benefits when talking about work ... | ■ Help residents make informed choices with accurate information. Ask ...  
  ■ “What are your questions about benefits?”  
  ■ “What have you heard about work and benefits?” |
| Ask residents who they want to include in discussions about benefits and work ... | Some examples include the following:  
  ■ Housing providers  
  ■ Employment service providers  
  ■ Behavioral healthcare providers  
  ■ Friends and family members |
| Help people access accurate information ... | ■ Learn how to identify quality benefits-planning services  
  ■ Learn about benefits-planning resources in your community (e.g., Work Incentives Planning and Assistance (WIPA) programs; other benefits planners) |
| Help residents develop a simple system for gathering and storing documents ... | Examples of things to gather:  
  ■ Letters and reports from benefits providers and benefits-planning services  
  ■ Employment documentation (e.g., pay stubs, W-2s, photo i.d.)  
  Examples of simple systems for storing documents:  
  ■ Pocket, accordion, and manila folders; large clasp envelopes  
  ■ Scanning documents into a computer |
| Help residents anticipate and avoid surprises ... | ■ Report earnings from work and other income (e.g., alimony, inheritance, lottery)  
  ■ Plan for and help interpret letters from benefits providers  
  ■ Offer to review and help modify personal budgets as income changes |
| Help residents report income and changes to benefits providers ... | ■ Ask this question: “Have you reported your income? If not, how can I help?”  
  ■ Discuss reasons for and concerns about reporting income to benefits providers  
  ■ Report changes, such as ...  
  ■ Address and phone number  
  ■ Cost of disability-related materials or services needed for work (e.g., medications)  
  ■ Household composition (e.g., marriage, divorce, child birth/adoption, someone moving in or out of residence) |
| Provide ongoing support about benefits ... | Help residents understand matters, such as ...  
  ■ Inquiries from benefits providers  
  ■ Adjustments of benefits (e.g., overpayments, underpayments)  
  ■ Disability reviews by Social Security  
  ■ State hearings, appeals, and waivers |
| Assist with long-term financial planning ... | Ask residents ...  
  ■ “What would you like your life to look like in the future?”  
  ■ “What would help you get there?”  
  ■ “How do benefits fit into this picture, if at all?” |

Recommended Resource: www.centerforebp.case.edu/resources/tools/benefits-advocacy-guide