



BENEFITS ADVOCACY & PLANNING

Relationships supporting recovery

Making The Case

Many people with disabilities rely upon benefits programs to help meet their basic needs and often feel protective of these lifelines. They fear that income earned from a part-time or full-time job will make them ineligible for benefits—that they will lose important medical and prescription coverage and other assistance.

Despite these fears, in most cases, people with disabilities can earn a regular paycheck and still retain benefits. They can also earn income and choose to reduce and gradually leave benefits programs over time. Examples of benefits include but are not limited to the following:

- Medicaid
- Medicare
- Supplemental Security Income (SSI)
- Social Security Disability Insurance (SSDI)
- Work incentives
- Food stamps
- Housing subsidies
- Energy assistance



A Little Know-How Helps A Lot

Individuals with disabilities need clear and accurate benefits information to make informed decisions about their financial future and employment goals. Therefore, our Center supports the development of benefits services in organizations that provide help to people with disabilities.

Learn more on back page.

**CENTER FOR
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ADVOCACY & PLANNING

Our Center makes an important distinction between *benefits advocacy* and *benefits planning* as we help organizations develop and enhance their capacities for both. We present advocacy and planning as a continuum of skills and services that complement each other.

Benefits Advocacy

A *benefits advocate* is a service professional, family member, or friend who learns basic information about benefits programs to help people with disabilities

- Understand basic benefits requirements (rules) and other regulations related to benefits and employment
- Transform any misconceptions about the impact of employment (making money) upon benefits
- Assist with reporting income to different benefits providers
- Assist with identifying and documenting available work incentives
- Assist with preventing potential benefits crises by identifying and reporting changes in life circumstances or employment status which might impact benefits

- Assist with interpretation and explanation of letters and documentation from various benefits programs
- Serve as an important bridge to more detailed benefits planning services

Benefits Planning

A *benefits planner* is typically a professional who has been trained to understand all the details of benefits programs. Benefits planners

- Conduct a comprehensive and detailed assessment of benefits needs
- Calculate the impact that income from employment will have upon various benefits
- Provide ongoing assessment (follow-along services) to help individuals understand how changes in employment status (like starting a job or increasing or decreasing hours of work) might impact benefits
- Help identify and resolve potential benefits problems
- Provide an individualized report to the person who receives benefits (beneficiary) which details the impact of employment upon the full range of benefits that are received by him or her

IMPROVE OUTCOMES

Enhance your organization's *benefits advocacy* and *benefits planning* services and achieve the following:

Decrease

- Fears about loss of benefits
- Unemployment and underemployment
- Vulnerability to poverty
- Dependence upon SSI & SSDI
- Staff frustration with benefits issues

Increase

- Ability of people with disabilities to make informed choices
- Family support for employment
- Positive employment & treatment outcomes
- Job retention
- Purchasing power
- Savings
- Quality-of-life
- Happiness and health
- Staff skills and satisfaction

CONSULTING & TRAINING

Our Center's goal is to help organizations become self-sufficient with *benefits advocacy* and *benefits planning* by providing the following:

- Introductory and advanced training
- Onsite consulting (coaching) that complements training
- Consulting for supervisors and team leaders
- Program and organizational consultation

About Us

Our consultants and trainers have worked in a variety of direct-practice settings, including vocational rehabilitation, mental health services, and services for people with other disabilities (e.g., visual, hearing, or cognitive impairments; mental retardation; chronic medical conditions). We emphasize

the importance of experiential learning and provide consulting and training with a variety of methods in many settings.

MULTIPLE DISCIPLINES

Our Center provides consultation and training about benefits information to a variety of professional disciplines, including the following:

- Mental health
- Substance abuse (addiction services)
- Supported employment
- Vocational rehabilitation
- Residential treatment
- Housing
- Healthcare for chronic medical conditions
- Visual and hearing impairments
- Cognitive impairments
- Developmental disabilities

The Center for Evidence-Based Practices at Case

Western Reserve

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between the **Jack, Joseph**

and Morton Mandel School of Applied Social Sciences

and the **Department of**

Psychiatry at the Case

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