



# 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)

## 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](http://www.centerforebp.case.edu/resources/tools/benefits-advocacy-guide)