**Menu of Services**

**Social Security Disability Benefits Planning/Counseling**

Service includes: identify and verify existing benefits, services and supports received. Inform individual of the impact of working on each benefit they receive to include Social Security, housing and healthcare. Services individualized to customers situation. For example, blind persons or youth. Provide examples to the customer. Assist customer to take action steps, if needed.

Outcome: Customer makes informed decisions about work.

Process:

MRS:

* Customer signs two SSA Release of Information forms
* Complete referral form
* Provide authorization

Benefits Planner:

* Request SSA BPQY from SSA.
* Schedule appointment with customer
* Provided education and guidance on benefits and work incentives.
* Complete two reports: MRS counselor Summary Report and Customer Summary Report.

**Social Security Benefits Support Services**

A service to assist individual who benefit from additional support to understand their current benefits and eligibility for additional benefits. Services includes 2-3 appointments. Examples of assistance include:

* Applying for benefits/programs through DHHS and/or SSA and other governmental programs and assistance with related paperwork.
* Support to report earnings to SSA. A focus will be on guiding the individual to develop a routine to ensure timely reporting guidelines are met.

Outcome: Customers apply information learned about benefits to their situation long-term.

Process:

* Contact individual to schedule appointment.
* Complete one summary of services report for MRS counselor. Customer will be provided handouts/information as needed.

**TRANSITION AGE BENEFITS PLANNING CHECKLIST**

**Social Security**

* Provide information on each benefit provided by Social Security
* Childhood Disability Benefits (CDB), if applicable
* Age 18 redetermination, if applicable
* Work Incentives, including SEIE
* Ensure claimant is aware of the benefits of working and earning work credits.

**Department of Health and Human Services**: Bridge Card

**Health care options**

* Medicaid
* Medicare
* Cost Savings Programs

**Future Planning**

* Housing
* Guardianship and alternatives to guardianship (provide information on process)
* Community Resources
* Shelter Funds options (Able Accounts and Special Needs Trust)