

Completing the Benefits Summary & Analysis Planning Sheet

Work Incentives Related to the Title II Disability Cash Payment (CDB, SSDI, DWB)	Work Incentives Related to the SSI Cash Payment
<p>List information in this section related to specific work incentives that apply to the beneficiary.</p> <p>Information listed here will be discussed in the BSA section “how your plans affect your SSA benefits”</p>	<p>List information in this section related to specific work incentives that apply to the beneficiary.</p> <p>Information listed here will be discussed in the BSA section “how your plans affect your SSA benefits”</p>
Employment Related Issues or Problems Associated with Title II Disability Benefits	Employment Related Issues or Problems Associated with SSI Benefits
<p>List any information from the BPQY that appears to be incorrect related to employment, such as: undeveloped earnings, incorrect SGA level, work incentive usage not identified, etc.</p> <p>List other issues, such as: incorrect SGA determination notification, improper calculation of earnings (counting vacation or sick pay), etc.</p> <p>Information listed here will be discussed in the BSA section “other things we discussed”. Specific solutions should be offered.</p>	<p>List any information from the BPQY that appears to be incorrect related to employment, such as: undeveloped earnings, work incentive usage not identified, etc.</p> <p>List other issues, such as: 1619(b) status not automatic, improper calculation of earnings, etc.</p> <p>Information listed here will be discussed in the BSA section “other things we discussed”. Specific solutions should be offered.</p>
Non-Employment Related Issues or Problems Associated with the Title II Disability Benefit	Non-Employment Related Issues or Problems Associated with the SSI Benefits
<p>List any problems related to benefits such as: garnishments, marriage issues, auxiliary issues, incarceration, CDB’s parent status, etc.</p> <p>Information listed here will be discussed in the BSA section “other things we discussed”. Specific solutions should be offered.</p>	<p>List any problems related to benefits such as: VTR or PMV, excess resources, change in living arrangement, changes in spouse or parent income or resources, future entitlement to other benefits, marriage, etc.</p> <p>Information listed here will be discussed in the BSA section “other things we discussed”. Specific solutions should be offered.</p>

<p align="center">Medicare Issues (Includes Medicare Savings Programs and Other Special Help with Medicare Expenses)</p>	<p align="center">Medicaid Issues (Includes Medicaid Waivers, Spend-Down/Medically Needy Program, and Medicaid Buy-In)</p>
<p>List discussion points related to Medicare and employment such as: EPMC, QMB/SLMB changes, changes to low income subsidy for Part D.</p> <p>Information listed here should be discussed under a separate heading of “healthcare” in the “how your plans affect your SSA benefits” or in the “how your plans affect other benefits” section. On the alternate BS&A template, there is a separate section specifically for healthcare issues.</p>	<p>List discussion points related to Medicaid and employment such as: 1619(b), Medicaid waiver, medically needy or “spend down”.</p> <p>Information listed here should be discussed under a separate heading of “healthcare” in the “how your plans affect your SSA benefits” or in the “how your plans affect other benefits” section. On the alternate BS&A template, there is a separate section specifically for healthcare issues.</p>
<p align="center">Other Federal, State or Local Benefits</p>	
<p>List all discussion points and work incentives related to employment impact on other federal, state or local benefits received, such as: earned income disregards and time limits related to food stamps, HUD programs, TANF; impact to worker’s comp or veteran’s benefits; etc. Information listed here should be discussed in the BSA section “how your plans affect other benefits”.</p>	
<p align="center">Referrals for Employment Services and Supports</p>	
<p>List any appropriate referrals to other agencies, such as: ENs/VR, One Stop services, transportation providers, adaptive equipment providers, childcare providers, and any other referral source that would assist the beneficiary in meeting their employment goals.</p> <p>Information listed here should be discussed in a separate paragraph in the “other things we discussed” section of the BSA.</p>	