

Instructions for Completing the Benefits Summary and Analysis

Although there is no required format for the BS & A, suggested formats are located in the WIPA National Training Manual. There are, however, essential elements that should be covered in all BS & As.

- **A summary of the current benefits situation.** This section would include a summary of any verified publicly- funded cash benefits received by the beneficiary or family members that could be affected by the beneficiary becoming employed, including SSA disability benefits, VA, TANF, unemployment compensation; healthcare benefits such as Medicaid and Medicare, Tri Care, CHAMPA, SCHIP, etc., and other federal benefits such as Food Stamps and HUD.
- **A summary of the Beneficiaries employment plan of goals.** The content of this section would be based on the information you have gathered from working with the beneficiary so far. It may include a formal employment goal, of may be less formal, and subject to change. For more guidance in this area, see the WIPA Manual, Module 6, competency unit 2.
- **An Analysis of how employment plans may affect all publicly-funded benefits.** Here is where you will address all of the benefits you summarized at the beginning of the report. This section should be organized into categories so that it is easy for the beneficiary to find the information. Categories would include SSA disability benefits, healthcare benefits, and other publicly-funded benefits.

When addressing benefits issues, be sure to include any information about the possible use of work incentives, with a reference to any calculation sheets that are being used as supporting documents. Keep in mind the concept of just-in- time benefits counseling, and try to address the relevant information only. Also include any information about employment-related benefit issues that may need to be resolved. Remember to examine the impact of employment on family members, if applicable.

- **Benefit issues not related to employment.** In this section you would address information about issues related to non-employment aspects of the beneficiary,

situation, such as the effect of marriage or living arrangements on publicly-funded benefits.

- **Employment services or supports needed.** Since the WIPA program is all about employment, you will want to have a section in the BS& A that summarizes current services or supports, addresses any unmet needs for services and supports that have been identified so far. Also include any relevant referral information.
- **Important points for the beneficiary to remember.** This section would include reminders about dates or deadlines related to benefits, reporting requirements and recordkeeping tips.