



Benefits Planning Assistance Outreach

Managing Your BPAO Caseload

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If you are having trouble dealing the volume of calls you are getting for benefits planning services, and/or the amount of time active cases demand from you, it may be that you are not managing your time and effort as efficiently as you could be. To assess your efficiency, ask yourself the following questions.

1. How much time am I spending on people who are not truly eligible for BPAO services? Are you meeting with ineligible people in person or handling their questions by phone? These would include people who are:

- ♦ Under 14 or 65 and older
- ♦ In applicant status or terminated from benefits
- ♦ Receiving Social Security benefits, but not because of disability (i.e.: dependents' benefits or retirement)

2. How much time are you spending with eligible people working on non-employment related issues such as:

- ♦ Unearned income and resource problems for SSI recipients who are not considering employment
- ♦ In-kind support and maintenance (VTR/PMV) issues for SSI recipients who are not considering employment
- ♦ Accessing other federal benefits such as food stamps, HUD, Medicaid
- ♦ Any other non-employment related issue?

3. What is the method you use most often to provide BPAO services? Do you have a procedure for screening by phone before you conduct face-to-face visits? Are you providing face-to-face services to conduct "intakes" or to provide I&R or short term problem solving? For people needing individualized advisement, are you getting benefits verified BEFORE you offer advice or write Benefits Analyses?
4. How much driving are you doing and how many work hours per week are consumed in getting from one location to another? When you do visit remote locations, how do you schedule your appointments and use your time?
5. How much time do you spend on non-service oriented activities such as outreach, presentations, paperwork and meetings? Are there ways you could reduce time spent in these activities?
6. Who are you verifying benefits for and how much time do you spend performing benefits verification? Are your methods of getting information from SSA the most efficient ones you could be using? Have you met with District Office (DO) Managers in your area to discuss methods for getting critical information released?
7. What process is used to determine which customers receive detailed benefits analysis and written benefits planning or advisement? Is this process used for everyone, some people, or no one? Is this decision guided by program policies and procedures, or left to individual staff members to determine on their own? When you develop a benefits analysis and report, how much time does this take?
8. How are you allocating your time between the various BPAO service types? Are your I&R contacts as long as your intensive service contacts? Is there any pattern

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to your distribution of services? Are you only providing I&R or other short-term services, instead of intensive services?

9. How much are you doing for customers as opposed to teaching them to do for themselves? Are you supplying customers with packets of information, handouts, videos or any other materials they can use to learn about various work incentives? Look at the number of PASS plans you have helped develop – are you writing them yourself, or helping the customer to do so? For customers interested in self-employment, how much are you involved in the business planning and income projection stage?
10. How much time are you spending on initial Ticket-to-Work inquiries? Are you referring customers to Maximus or other ENs for more information about the ticket to work program?
11. Do you have a triage system for allocating your services to those who most need them? This means that you have a prioritization plan that is used when your program has reached maximum service capacity. A possible way to prioritize customers might be:

- ♦ First Priority--people with job offers, or who are already employed with benefits issues that could cause employment loss or reduction.
- ♦ Second Priority--people who are seriously considering employment, including those who are considering ticket assignment, or who are already employed but are considering a job change of some sort.
- ♦ Third priority--people who may consider employment in the future and those who just want general information about the effect of earnings on benefits.
- ♦ Last priority--people who are not considering employment, but have other benefits issues they need help with.

12. How much long term benefits assistance are you doing? Are you trying to find other agencies that can be supported to perform this function? What is your procedure for deciding who needs long-term assistance? When you do provide long-term assistance, what form does it take? How do you decide how often and when to provide assistance?
13. How much time are you spending on pro-active follow-up activity? Are you writing letters or calling clients you have not heard from in awhile? What are you telling your customers about the frequency of contact they can expect from you and whose responsibility it is to make contact?
14. How are you interacting with SSA personnel and which staff members are you dealing with? Are you using phone calls, email and faxes or are you going to the FOs in person? How much time are you spending accompanying customers to SSA visits?
15. How much time are you spending to sort out how the other federal benefits work (HUD, TANF, Medicaid, food stamps). Have you gotten formal training on how your state operates these programs? How much effort have you put into developing knowledgeable contact people within these state agencies? Are you working collaboratively with other BPAO projects and staff in your state to get state-specific benefits information or are you working in isolation?
16. When you have a Social Security work incentives question, how do you go about resolving it? Do you search the POMS, call or email your Technical Assistance Liaison, ask other BPAO staff, or get help from SSA personnel? How much time do you spend per week getting answers to questions or researching benefits issues?
17. How much time are you spending on record keeping and client file management? Are there any forms or paperwork procedures that you could dispense with? Are you duplicating any paperwork needlessly? For example, are you entering information into the BPAO data system and re-entering that information somewhere else? Are you wasting time collecting information that you do not need?