Benefits Planning Assistance Outreach

BPAO Service Intakes

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Intakes for Customers Receiving Short-Term BPAO Services:

For beneficiaries receiving short-term information and referral services (I&R), an intake would consist of the following steps:

1. Provide explanation of BPAO services
2. Obtain informed consent for collection and submission of BPAO data
3. Gather BPAO data and contact info
4. Provide information and referral services based upon request
5. Complete staff note describing services rendered or issues discussed
6. Mail out written materials if necessary

For beneficiaries receiving short-term problem solving, an intake would consist of these steps:

1. Provide explanation of BPAO services
2. Obtain informed consent for collection and submission of BPAO data
3. Gather BPAO data and contact info
4. Ascertain problem requiring intervention and what information is needed to resolve the problem
5. Get releases of information forms signed as needed and submit to information sources
6. Complete staff note describing services rendered and issues discussed

Next steps for short-term problem solving:

1. Verify benefits or issues related to the specific presenting problem
2. Call or meet with client to provide information on problem resolution
3. Follow up with written summary of issues discussed and steps to be taken. Include written materials if necessary. Letter should include advisement disclaimer
4. Complete staff note describing services rendered and issues discussed

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Intakes for Customers Receiving Intensive BPAO Services:

For BPAO clients who receive longer term, more intensive services such as benefits advisement, support planning and benefits management assistance, an intake would consist of the steps described above plus some additional steps. In most cases, intensive services are offered after an initial contact during which either I&R or short-term problem solving services were provided. In these cases, the initial intake procedure already would have been performed, including the following steps:

1. Provide explanation of BPAO services
2. Obtain informed consent for collection and submission of BPAO data
3. Gather BPAO data and contact info
4. Ascertain presenting questions or issues which need to be dealt with and what information is required to offer advisement
5. Get releases of information forms signed as needed and submit to information sources
6. Complete staff note describing services rendered and issues discussed

Next steps for intensive services

1. Review BPAO program policies and procedures with client and get signature to verify this information was reviewed.
2. Verify ALL benefits related to the presenting question or issue.
3. Research any issues in which there is any uncertainty
4. Meet with client to provide counseling on presenting issues and any related issues. Use calculation charts, the SSA Redbook or other material to explain and document advice given.
5. Ascertain if additional services are necessary – determine time frame for delivery of additional services.
6. Follow up with written Benefits Analysis. Include written materials if necessary. Letter should include advisement disclaimer.
7. Complete staff note describing services rendered and issues discussed
8. Update BPAO data system to reflect additional services rendered.

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