

Benefit U Planning Services: What to Expect

If you have not worked with a Benefits Planner in the past, it may be helpful to know what to expect. The information below provides a general overview of Benefit U's process of getting you ready to work with a Benefits Planner.

If you have not done so already, please schedule an intake at www.benefitu.org/service-eligibility. Intakes will be scheduled for 60 minutes, or 90 minutes if an interpreter is needed. This will be an opportunity for us to hear about your needs and to gather some baseline information. During your intake it is helpful to have the following information available:

- Summary of employment history including employer names, locations, start/end dates, and wage history
- Copies of insurance cards, including Medicare and Apple Health (Medicaid)
- Any letters from Social Security regarding current benefits or concerns
- Contacts for key team members: Employment supports, Guardian, Representative Payee, DD Case Manager, etc.

After the intake, the call center will coordinate with our Benefits Planners to identify the next available person to work with you. Depending on current capacity it may take up to a few weeks to connect you with the planner who can best support you and your needs. During this time, the intake team may collect additional information and release forms that will allow our team to hit the ground running once connected to a planner. We will do our best to prioritize time sensitive situations as best as possible.

Once connected, your planner will review the information collected at intake to ensure they have a clear understanding of your goals. Depending upon your situation, the length of benefit planning may range from 1-2 meetings for straight forward situations to several months for more complex needs.

Benefit U planners will be able to support you by answering questions, exploring options, planning for the future, and helping you understand possible steps if seeking a resolution or change to a benefit status. At this time Benefit U is not able to complete paperwork on behalf of an individual or provide tax and medical plan advice.

Once we have reached a point where your questions or needs have been met, we will provide you with a summary of your goals and outcomes. If additional needs arise, please reconnect with us as a '[return customer](#)' via our website.

We hope that this provides some clarity as we begin our services with you. For additional information, please reach out to us at support@benefitu.org.

Thank you,



Benefit U Support

www.benefitu.org

support@benefitu.org