

# BenefitU 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](http://www.benefitU.org/service-eligibility). Intakes are scheduled for 60 minutes, or 90 minutes if an interpreter is needed. This meeting is an opportunity for us to ensure eligibility, hear about your needs, and to gather some baseline information. We encourage you to review the list of services BenefitU is and is not able to provide on the next page.

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 / DSB Case Manager, etc.

After the intake, we will identify the next available Benefit Planner to work with you. Depending on 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, we may request additional information and release forms that will allow our team to hit the ground running. We will also do our best to prioritize time sensitive situations. Once connected, your planner will review your information and goals, and coordinate a time to meet.

Benefit planning may range from 1-2 meetings for straight-forward situations to several months for more complex needs.

Once your questions and needs have been addressed, your planner will provide you with a summary of your goals and current benefits, as well as next steps for anything that requires follow up. If additional support or planning is needed in the future, 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](mailto:support@benefitU.org).

Thank you,



**Benefit U Support**

Website Link: [www.benefitU.org](http://www.benefitU.org)

Contact Us: [support@benefitU.org](mailto:support@benefitU.org)



## BenefitU's Services May Include:

- Answer questions and provide information about Social Security disability related benefits to allow you to make an informed and person-centered decisions.
- Verification of Social Security and State benefits received.
- Assist in identifying information that may be beneficial to submit to Social Security or other entities related to current needs or requests, as well as guidance on follow up to ensure your information is received and reviewed accordingly.
- Coaching you and your team to understand how employment and benefits interact.
- Identifying work incentives that allow you to maximize earnings and reach your employment goals while maintaining benefits.
- Provide you with tools and resources to address issues such as overpayments and loss of Social Security, Medicare, or Medicaid benefits.
- When interested, develop strategies to support you in successfully stepping away from benefits that may be limiting your opportunities to earn or build wealth.
- Addressing how changes in personal situation or employment status may impact your benefits.
- Share information and resources for additional benefits and services.

## BenefitU is not able to Provide:

- Legal or tax advice.
- Assistance selecting medical coverage.
- How changes in personal circumstances impact your HUD/Section 8 housing. We encourage you to reach out to your local office to discuss those details directly.
- Completing applications for benefits, Social Security forms, or other required paperwork.