

Alaska Works Initiative



Benefits Analysis Checklist

Client:

<input checked="" type="checkbox"/>	Items to be included:	Comments
<input type="checkbox"/>	Written in an understandable manner?	
<input type="checkbox"/>	List ALL benefits currently receiving (VA, APA, SSI, SSDI, Medicaid, unearned income, subsidized housing, etc) Important to VERIFY this information.	
<input type="checkbox"/>	Conduct a thorough interview to include: marital status, family/dependents, their benefits, etc.	
<input type="checkbox"/>	Have you explained any gaps, why isn't the client receiving certain benefits? (Keep it clear and simple)	
<input type="checkbox"/>	Do you have a signed release form from ALL agencies and relevant parties?	
<input type="checkbox"/>	Have you stated in the report if you are not able to verify information included?	
<input type="checkbox"/>	Is it clear exactly where the consumer is in their TWP?	
<input type="checkbox"/>	Have you included all state and federal benefits and work incentives the client may be eligible to receive?	
<input type="checkbox"/>	Have you included all calculations in the report? These can be an attachment.	
<input type="checkbox"/>	Have you included SSI payment standards & APA breakeven points?	
<input type="checkbox"/>	If information is available, when writing the report during the last quarter (October – Dec), state the new SGA amounts for the following year, state other amounts if known.	
<input type="checkbox"/>	If reporting a TWP from years ago, have	

	you included the SGA during that period?	
<input type="checkbox"/>	Have you explained the EZ Back On provision? How to get reinstated? This can be reassuring to know.	
<input type="checkbox"/>	Have you included 1619B, Medicaid, and Medicaid Buy-In? Need to know threshold amount.	
<input type="checkbox"/>	Include resource limits, \$\$ in savings, APA, SSI, value of home, vehicles, etc.	
<input type="checkbox"/>	Important that report/information is presented in an understandable fashion, for both the consumer and counselor. Report may be complicated, but it is essential that this information be clearly presented to the client in a face-to-face meeting.	
<input type="checkbox"/>	Include a contact list of who was talked to and when so that if follow-up is necessary, the client and their supports know who was spoken to.	

Reviewed By: