



Tips for Completing the BS&A Planning Sheet

January 2021

Summary of Current Benefits Situation

In the BS&A, address the beneficiary's Social Security and other benefits. Focus on benefits that work and earnings could affect. For each benefit, note in the BS&A any issues you identified during the verification process that you'll need to address.

- List of benefits verified:
- List of benefits needing verification:

Tips for CWICs:

- In this section, list all publicly funded cash benefits the beneficiary, family members, or both receive; health care benefits; and any other federal, state, or local benefits.
- For benefits you've already verified, note any issues that need to be resolved. For example, for Title II and SSI benefits, list any information from the BPQY related to employment that appears to be incorrect, such as undeveloped earnings or unidentified work incentive usage. For benefits still needing verification, indicate the source you'll use to verify.

Summary of Current Employment and Future Employment Plans

Current employment situation:

- Job title:
- Start date:
- # hours/per week and rate of pay:

- Monthly earnings estimate:

Future employment plans and earnings goals identified:

Type of job or job title:

Start date:

hours/per week and rate of pay:

Monthly earnings estimate:

How Employment May Affect Your Benefits

List of Title II disability work incentives to address in the BS&A, based on current employment and earnings situation or future employment plans:

Tips for CWICs:

In this section, list the Title II work incentives that apply to the beneficiary, as well as key points to address in the BS&A on how the current earnings or earnings goal will affect the Title II benefit.

List of SSI work incentives to address in the BS&A based on current employment and earnings situation or future employment plans:

Tips for CWICs:

In this section, list the SSI work incentives that apply to the beneficiary, as well as key points to address in the BS&A on how the current earnings or earnings goal will affect the SSI benefit.

List of health insurance components that current employment and earnings situation or future employment plans may affect:

- **Medicaid** (include all categories of coverage such as Medically Needy, HCBS Waiver, or Medicaid Buy-in, if applicable)
- **Medicare** (include Medicare Savings Program and Part D low-income subsidy if applicable)
- **Other health insurance options**, if applicable (e.g., TRICARE, VA, or employer plans)

List of other federal, state, or local benefits (SNAP, HUD, rental subsidies, etc.) and associated work incentives to address for each, based on current employment and earnings situation or future employment plans:

Tips for CWICs:

In this section, for each benefit identified, list all discussion points and work incentives related to the impact of the current earnings or earnings goal. Examples include earned income disregards and time limits related to SNAP, HUD programs, TANF, effect of earnings goal on Worker’s Compensation or Veterans benefits, etc.

Employment Services and Supports

List of employment services the beneficiary is currently receiving:

List of recommended employment services, supports, or both that could help the beneficiary to achieve his or her employment/earnings goal:

Tips for CWICs:

List any appropriate referrals to other agencies such as ENs/VR, American Job Center services, transportation providers, assistive technology services, childcare providers, and any other service or support provider that may help the beneficiary meet his or her employment goal.

Other Topics

List any additional benefit issues you’ll need to address:

- **Issues related to Title II disability benefit** (e.g., potential eligibility on another work record, conversion to retirement, overpayment issues, etc.)
- **Issues related to SSI benefit** (e.g., in-kind support and maintenance, excess resources, deeming, marriage, etc.)
- **Issues related to other Federal or State benefits** (i.e. housing, SNAP, ABLE, etc.)

Important Things For You to Remember

List all issues requiring immediate action you’ll need to address:

Tips for CWICs:

Highlight steps or actions the beneficiary or representative should address immediately or within a short period of time.

Important dates or deadlines:**Tips for CWICs:**

Highlight steps or actions the beneficiary or representative should address related to reporting or collecting receipts/documentation to provide to Social Security and/or any other agency.

Attachments

List any materials that provide additional information (e.g., SSI calculation sheets, TWP/EPE tracking chart, fact sheets, etc.)