Client’s First Name Benefit Report

You’ll Get Ahead by Working!

### Income and Health Coverage Snapshot

| When you earn **$ [earnings goal 1] /month**:* + You will have Choose an item. income
	+ Your health care coverage through [program] is expected to [impact of earnings goal 1 on health coverage]

When you earn **$[earnings goal 2]/month**:* + You will have Choose an item. income
	+ Your health care coverage through [program] is expected to [impact of earnings goal 2 on health coverage]
 |
| --- |

Client’s First Name Client’s last name with ‘s Benefit Report

Created by
Benefit Coach’s Organization

***Prepared by Benefit Coach’s Name***

# Your Current Situation & Work Plans

Your Current Benefits

I’ve checked with these agencies: [list of agencies, such as Social Security Administration (SSA), Department of Human Services (DHS), etc.].

I verified that you get:

* $[current SSDI monthly benefit]/month net Social Security Disability Insurance (SSDI)
* $[current SSI monthly benefit]/month Supplemental Security Income (SSI)
* $[current MSA monthly benefit]/month Minnesota Supplemental Aid (MSA)
* $[current GA monthly benefit]/month General Assistance (GA)
* $[current SNAP monthly benefit]/month Supplemental Nutrition Assistance Program (SNAP)
* $[current MFIP monthly benefit]/month Minnesota Family Investment Program (MFIP)
* Medical Assistance (MA) [type and premium/spenddown amount]
* Medicare (Part A, Part B and Part D)
* Medicare Part B premium payment assistance
* Medicare Part D Low Income Subsidy (Extra Help)
* [others]

Your Work Plans

You told me:

* [Description of current work & earnings level, if applicable]
* You get employment services from: [list of agencies]
* You said you may need help with: [Description of supports and services needed to reach goal]

We talked about the following possible future earnings plans:

* Plan 1: $[earnings goal 1]/month
	+ [Description of Goal 1]
* Plan 2: $[earnings goal 2]/month
	+ [Description of Goal 2]

# Your Cash Benefits & Work

## Choose an item.

| Animated picture of person's hand holding a fake Social Security cardYou are in your [Current phase of SSDI work incentives].During this phase:* + When you earn **$[earnings goal 1]/month**: Your SSDI is expected to [impact of earnings goal 1 on SSDI benefit]. Your total income will be [total income with earnings goal 1].
	+ When you earn **$[earnings goal 2]/month**: Your SSDI is expected to [impact of earnings goal 2 on SSDI benefit]. Your total income will be [total income with earnings goal 2].

[You can learn more in DB101’s SSDI article](https://mn.db101.org/mn/programs/income_support/ssdi2/program.htm). |
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## Supplemental Security Income (SSI)

| With SSI, you always have more income when you work, even if your SSI goes down. * + Animated picture with teal background of brown wallet with Social Security card in front, bills coming out of the top and coins coming out of the right hand side.When you earn **$[earnings goal 1]/month**: Your SSI is expected to [impact of earnings goal 1 on SSI benefit]. Your total income will be [total income with earnings goal 1].
	+ When you earn **$[earnings goal 2]/month**: Your SSI is expected to [impact of earnings goal 2 on SSI benefit]. Your total income will be [total income with earnings goal 2].

[You can learn more in DB101’s SSI article](https://mn.db101.org/mn/programs/income_support/ssi2/program.htm). |
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## Minnesota Supplemental Aid (MSA)

| With MSA, you always have more income when you work, even if your MSA goes down.* + Picture of state of MN sillouette, with orange background and a sample Electronic Benefit Transfer (EBT) card overlapping. When you earn **$[earnings goal 1]/month**: Your MSA is expected to [impact of earnings goal 1 on MSA benefit]. Your total income will be [total income with earnings goal 1].
	+ When you earn **$[earnings goal 2]/month**: Your MSA is expected to [impact of earnings goal 2 on MSA benefit]. Your total income will be [total income with earnings goal 2].

[You can learn more in DB101’s MSA article](https://mn.db101.org/mn/programs/income_support/msa/program.htm). |
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## General Assistance (GA)

| With GA, you always have more income when you work, even if your GA goes down.* + When you earn **$[earnings goal 1]/month**: Your GA is expected to be $[GA with earnings goal 1]/monthPicture of state of MN sillouette, with orange background and a sample Electronic Benefit Transfer (EBT) card overlapping. . Your total income will be [total income with earnings goal 1].
	+ When you earn **$[earnings goal 2]/month**: Your GA is expected to be $[GA with earnings goal 2]/month. Your total income will be [total income with earnings goal 2].

[You can learn more in DB101’s GA article](https://mn.db101.org/mn/programs/income_support/ga/program.htm). |
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## Supplemental Nutrition Assistance Program (SNAP)

| * + When you earn **$[earnings goal 1]**/month: Your SNAP is expected to be $[SNAP with earnings goal 1]/monthPicture of state of MN sillouette, with blue background and a sample Electronic Benefit Transfer (EBT) card overlapping. . Your total income will be [total income with earnings goal 1].
	+ When you earn **$[earnings goal 2]/month**: Your SNAP is expected to be $[SNAP with earnings goal 2]/month. Your total income will be [total income with earnings goal 2].

[You can learn more in DB101’s SNAP article](https://mn.db101.org/mn/programs/income_support/food_support/program.htm). |
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## Minnesota Family Investment Program (MFIP)

| * + When you earn **$[earnings goal 1]/month**: [Your/your children’s] MFIP is expected to [impact of earnings goal 1 on MFIP benefit]Picture of state of MN sillouette, with purple background and a sample Electronic Benefit Transfer (EBT) card overlapping. . Your total income will be [total income with earnings goal 1].
	+ When you earn **$[earnings goal 2]/month**: [Your/your children’s] MFIP is expected to [impact of earnings goal 2 on MFIP benefit]. Your total income will be [total income with earnings goal 2].

[You can learn more in DB101’s MFIP article](https://mn.db101.org/mn/programs/income_support/mfip/program.htm). |
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## Section 8 Housing Choice Voucher

| * + Animated picture of a house with a hand dropping a coin in the roof, with purple background.When you earn **$[earnings goal 1]/month**: Your rent is expected to be $[rent with earnings goal 1]/month. [Earned income disregard statement, if it applies]
	+ When you earn **$[earnings goal 2]/month:** Your rent is expected to be $[rent with earnings goal 2]/month. [Earned income disregard statement, if it applies]

[You can learn more in DB101’s Housing article](https://mn.db101.org/mn/programs/income_support/housing/program.htm). |
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## Housing Support (formerly GRH)

| With Housing Support, you always have more income when you work, even if your Housing Support goes down.* + Animated picture of a house with a hand dropping a coin in the roof, with purple background.When you earn **$[earnings goal 1] /month**: The amount you pay your Housing Support provider is expected to be [Housing Support with earnings goal 1].
	+ When you earn **$[earnings goal 2]/month**: The amount you pay your Housing support provider is expected to be [Housing Support with earnings goal 2].

[You can learn more in DB101’s Housing article](https://mn.db101.org/mn/programs/income_support/housing/program2e.htm). |
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# Your Health Coverage

## Medical Assistance (MA)

| * + Animated picture of a red heart with hand holding stethescope over it and a sample Minnesota Health Care Programs card overlapping the heart, all on a teal color background.When you earn **$[earnings goal 1]/month**: Your MA is expected to [impact of earnings goal 1 on MA benefit].
	+ When you earn **$[earnings goal 2]/month**: Your MA is expected to [impact of earnings goal 2 on MA benefit].

[You can learn more in DB101’s MA Overview article](https://mn.db101.org/mn/programs/health_coverage/ma_overview/). |
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## Medical Assistance for Employed Persons with Disabilities (MA-EPD)

| * + Animated picture of a red heart with hand holding stethescope over it and a sample Minnesota Health Care Programs card overlapping the heart, all on a teal color background.When you earn **$[earnings goal 1]/month**: Your MA-EPD is expected to [impact of earnings goal 1 on MA benefit].
	+ When you earn **$[earnings goal 2]/month**: Your MA-EPD is expected to [impact of earnings goal 2 on MA benefit].

[You can learn more in DB101’s MA Overview article](https://mn.db101.org/mn/programs/health_coverage/ma_overview/). |
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## MA-Waiver Programs

| * + When you earn **$[earnings goal 1]/month**: Your [waiver name] is expected to [impact of earnings goal 1 on MA-Waiver program].
	+ When you earn **$[earnings goal 2]/month**: Your [waiver name] is expected to [impact of earnings goal 2 on MA-Waiver program].

[You can learn more in DB101’s MA-Waivers Programs article](https://mn.db101.org/mn/programs/health_coverage/waivers/program.htm). |
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## Medicare

| * + Animated picture of a clipboard with a paper that has a red circle with a white cross in the middle, a hand holding the clipboard and another hand with a pen ready to write on the paper. A sample Medicare card is clipped to the clipboard, all on a blue background.When you earn **$[earnings goal 1] /month**: Your Medicare is expected to [impact of earnings goal 1 on Medicare].
	+ When you earn **$[earnings goal 2]/month**: Your Medicare is expected to [impact of earnings goal 2 on Medicare].

[You can learn more in DB101’s Medicare article](https://mn.db101.org/mn/programs/health_coverage/medicare2/program.htm). |
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## Medicare Part B: Help with Costs

| Right now, the state pays your Medicare Part B premium because [reason – QMB/SLMB/MA-EPD, etc.].* + When you earn **$[earnings goal 1]/month**: Your [name of Part B assistance] is expected to [impact of earnings goal 1 on Part B assistance].
	+ When you earn **$[earnings goal 2]/month**: Your [name of Part B assistance] is expected to [impact of earnings goal 2 on Part B assistance].

[You can learn more in DB101’s Medicare article](https://mn.db101.org/mn/programs/health_coverage/medicare/program4.htm). |
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## Medicare Part D Low Income Subsidy

| * + When you earn **$[earnings goal 1]/month**: Your Part D Low Income Subsidy is expected to [impact of earnings goal 1 on Low Income Subsidy].
	+ When you earn **$[earnings goal 2]/month**: Your Part D Low Income Subsidy is expected to [impact of earnings goal 2 on Low Income Subsidy].

[You can learn more in DB101’s Medicare article](https://mn.db101.org/mn/programs/health_coverage/medicare/program4.htm). |
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# Managing Your Benefits & Reporting Your Income

[Copy and paste results of the “Managing Benefits” DB101 Vault activity here]

**If you have any questions, talk to Disability Hub MN at 1-866-333-2466.**

# Next Steps

| Action Step | Person Responsible | Target Date | Completion Date |
| --- | --- | --- | --- |
| Carefully review this summary and ask for clarification if you have any questions. | Client’s First Name and Benefit Coach’s First Name | [date] |  |
| Contact Benefit Coach’s First Name when you have a job offer to update this report. | Client’s First Name | When job is offered |  |
|  |
| [Third item] | [Person responsible] | [Target date] |  |

# Important Things to Remember

[Include important things to remember here]

Agencies That Can Help

| Agency | Phone | Address/Web Site |
| --- | --- | --- |
| Disability Hub MN | 1-866-333-2466 | [www.disabilityhubmn.org](http://www.disabilityhubmn.org)  |
| [Agency name] | [Agency phone] | [Agency address/website] |

Using This Report

* + Keep this report and come back to it when you have questions about how your employment plans may affect your income and benefits.
	+ Share this report with other people who are helping you with benefits and work.

Changes in your situation may seriously affect the accuracy of this report. **Contact me right away to discuss any changes in your benefits or employment plans, or if you have any more questions about how work may affect your benefits.**

My Contact Information

Benefit Coach’s Name
Benefit Coach’s Phone Number
Benefit Coach’s Email