

Application for Benefits Coach Certification

The benefits coach certification is awarded by Disability Hub MN (the Hub) to professionals who support people with disabilities in understanding the effect of earnings on benefits.

The certification will help ensure that the professionals have the knowledge and skills to effectively provide benefits coaching services.

What is expected of a Benefits Coach?

- Benefits coaches must spend at least 10 hours each week providing information about benefits and work. Ideally, professionals delivering benefits coaching would do so in a full-time capacity.
 - Benefits coaching must be provided using a person-centered approach that supports informed choice.
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Benefits Coach Certification Requirements

Certification candidates must successfully complete benefits coach training, plus the subsequent exams.

• **Step 1: Benefits coach initial self-paced training**

The self-paced training is virtual, hosted on a learning management system. The lessons provide detailed information on benefit program rules, an overview of the benefits coaching service and the DB101 website, and procedures for verifying benefits. The lessons must be completed in a period of four weeks, with quiz scores for each lesson of 80% or higher within two attempts. When the candidate has successfully completed step one, they may move on to step two.

Timing and pace for step 1: The pace of training is dependent on each individual. The content for Step 1 will be available to the applicant 4 weeks in advance of Step 2, for the applicant to fit in the training at their own pace.

• **STEP 2: Benefits coach initial instructor-led training**

The instructor-led training is delivered as a series of webinars that focus on the skills needed to deliver benefits coaching, doing a benefits checkup, completing a benefits and work estimator session, writing a benefits report, explaining results and helping a person make financial decisions about work. Candidates have several required activities that will be graded by the instructor. When the candidate has successfully completed step two, they may move on to step three.

Timing and pace for step 2: The instructor-led training webinars are held over a period of four days during one week. Webinars are generally scheduled Mondays, Tuesdays, and Thursdays from 10:00am–3:00pm, and Wednesdays from 10:00am–12:00pm (schedule subject to change).

Certification Requirements, continued:

- **STEP 3: Practical exam**

Candidates will be required to demonstrate the benefits coaching skills that do not involve interacting with a customer, like:

- determining the appropriate level of service,
- scrutinizing benefit verifications,
- completing an estimator session and interpreting the results.

The exams will be posted on the learning management system and candidates will submit their responses on the learning management system. Some of the exams will be auto-graded and others will be manually graded by the instructor. When the candidate has successfully completed step three, they may move on to step four.

Timing and pace for step 3: The pace of this final required step is dependent on the individual, and applicants have 3 weeks to complete this step.

- **STEP 4: Practical evaluation (recommended but not required)**

When the practical exam is complete, candidates are encouraged to demonstrate their benefits coaching skills. Typically, the supervisor attends a benefits coaching meeting with a customer to observe the candidate as they present the information gathered and explain how work will impact benefits.

Successful completion:

Candidates who successfully complete steps one through three will receive documentation of certification. The certification is valid for one year. To maintain certification in subsequent years, the benefits coach must complete the required maintenance and recertification activities.

Failure to complete one or more certification requirements:

- **Training:** Candidates who cannot complete the required training by the deadline may request an extension. The request must be made prior to the deadline and requires approval by the supervisor and the course instructor. If the extension is not approved, the training will need to be retaken from the beginning.
- **Self-paced quizzes:** Candidates will be given two attempts to achieve a score of 80% or higher on each self-paced quiz. If a candidate does not achieve 80% or higher within 2 attempts, a remediation plan must be created and approved by the supervisor and the course instructor.

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Applicant Information

General information:

Name (first and last): _____

Employer: _____

Job title: _____

Role:	Lead agency	Employment Service Provider	VRS/SSB
	School	Advocacy Organization	Other

Years of experience assisting people with disabilities:	1-5 years	6-10 years	11-20 years
	21-30 years	31-40 years	40+ years

Contact information:

Work address: _____

Work city: _____ Work state: _____ Work zip code: _____

Work email address: _____

Work phone: _____

Acknowledgments:

As a professional in disability services applying for the Benefit Coach Certification process, I acknowledge that I have read the Benefits Coach Certification Requirements outlined in this document and expect that I will be able to meet the requirements as outlined.

I acknowledge that I have completed the Hub’s online [Level 1](#) and [Level 2](#) Benefits Planning trainings.

I acknowledge the time commitment required to complete all required steps of this training and will work with my supervisor to ensure I can meet the time commitments.

Applicant signature

Date



Supervisor's Recommendation

To become a benefits coach, applicants need the approval of their direct supervisor. Please have your supervisor complete the information and recommendation below.

Supervisor information:

Supervisor's name: _____

Supervisor's email address: _____

Acknowledgments:

As the applicant's supervisor, I acknowledge that I:

- Have read the Benefits Coach Certification Requirements outlined in this document,
- Recommend the applicant named above for benefit coach certification training,
- Expect that the applicant will be able to meet the training and certification requirements.
- Will ensure the applicant is allowed the time needed to complete the training and certification process.

I understand that the certification does not include supervision and ongoing monitoring of benefits coaching, and that the supervisors of the professionals are responsible for monitoring the benefits coaching to ensure that the service is delivered in a manner consistent with the benefits coach performance standards.

Supervisor signature

Date

Submitting your application

Submit your complete and signed application by emailing it to benefitsplanning@disabilityhubmn.org