# Beneficiary Support Toolkit for Trust Professionals


# Chapter 3: Evaluating Needed Supports and Services

**How Do I Find Supports and Services for My Beneficiary?**

People with disabilities and their families often need public benefits and services, like Medicaid, Medicare, Social Security, welfare payments, SNAP (food stamps), and public housing vouchers or rental assistance, to support their needs and to live as independently as possible.

While these resources are essential to people and their families, the various public benefits systems can be extremely complex and frequently difficult to navigate efficiently. When families support multiple members with disabilities or a family member with multiple disabilities and must navigate two or more systems (e.g., physical, developmental, mental health, and/or aging-related disability systems), this can become even more challenging. Many families give up on working with the system entirely, and they stop informing themselves about needed services and even trying to access this support.

This chapter offers recommendations, tips, and tools you can use to gather insights about needed or wanted services, observe and evaluate potential services or support needs during regular visits, and connect with services in your community. We hope that you find these helpful to you in your work.

**Be aware of available benefits, services, and supports in your community.**

The ability to access and receive public benefits and supports is often an essential component for people with disabilities to live a good, independent life. As a trust professional, you can significantly impact a beneficiary’s quality of life by helping beneficiaries and families identify potential services and connecting them with resources that can help people live the life they want.

[This resource can help you identify potential benefits and supports in your state.](https://thearc.org/wp-content/uploads/2021/12/3.1-Identifying-Public-Benefits-and-Systems.docx) We have organized this by the type of help a person may be seeking and have included contact information to learn more about benefits in each state.

**Learn about current and wanted services, starting on day one.**

From the day you first meet with a prospective beneficiary and their family, start to learn about the services they have, as well as the help they want to achieve their future goals.

We have created [a checklist](https://thearc.org/wp-content/uploads/2021/12/3.2-Learning-about-Existing-and-Desired-Services.docx) you can use with a beneficiary and family to learn more about current supports and services and how the beneficiary would like the trust to help them with future goals.

In addition to this conversation, you may want to consider encouraging your beneficiary and their supporters to create a future plan. A future plan helps a person and their supporters communicate important aspects of their life now, as well as what they want to occur in the future. Beneficiaries and families can sign up for a [Build Your Plan account](https://futureplanning.thearc.org/landing) to maintain their future plan online, share their plan, and get customized To-Do’s to keep planning. Beneficiaries can also [download and complete a printable plan](https://futureplanning.thearc.org/assets/CFP-LOI-225742be9adf0a44017a713dd7ec0d7c2e79514bb29f592a45e4b446e02a52c4.pdf) that they can share with others, including trust professionals.

**Check-in regularly about services and changing needs.**

Make sure to ask questions and recognize changing needs and goals during any regularly scheduled check-ins with beneficiaries and families, regular home visits, and yearly budget-planning meetings.

Scheduling regular check-ins with beneficiaries and families is an important way to:

* Understand what is occurring in a person’s life right now
* Learn about changes that may occur in the future or that a beneficiary wants to occur
* Identify needed services and connect beneficiaries and families to resources

This toolkit includes [a checklist you can use](https://thearc.org/wp-content/uploads/2021/12/3.3-Updating-Support-and-Service-Arrangements-and-Goals.docx) to gather any updates about changes in arrangements from beneficiaries in your check-ins, visits, and other meetings.

**Brainstorm supports or services that may be helpful with the beneficiary, at least yearly.**

Once you know about services a person is interested in and how they want to grow, schedule time to brainstorm with the beneficiary and other supporters about how the trust can support them to achieve their goals and pay for things they need.

Before the meeting, it is a good idea to identify some initial ways the trust could support a person.

We have also included [a list of common supports and services](https://thearc.org/wp-content/uploads/2021/12/3.4-Matching-Supports-and-Services-with-Life-Goals.docx) that people may find helpful, based on some common life goals. This resource may help you suggest these initial ideas.

However, it is equally important to understand that people with disabilities and their families are the experts on the types of supports and services that will help them achieve their goals. While you may have ideas, listen to feedback and alternatives from beneficiaries about what they would like.

**Shift disagreements on disbursements from “we can’t” to “we can.”**

Sometimes, beneficiaries and families may suggest a support or service that does not seem like it would fit into what the trust can pay for. Ideally, this would occur in budget planning for the year, but this sometimes also happens after the beneficiary has already paid for something.

We have included [a checklist](https://thearc.org/wp-content/uploads/2021/12/3.5-Addressing-Disagreements-about-Supports-and-Services.docx) to help you deal with disagreements in planning meetings or if you must reject a reimbursement request. This list can help you to (1) flag why a payment is not able to be made, (2) offer more information on what can be done to support a need or goals, and (3) provide some education on what is or is not permitted under trust rules and regulations.

**Reflection Questions**

1. How and when does your trust begin to learn about current services and future goals and hopes? How can this process be improved?
2. How frequently do you ask beneficiaries about what’s going on in their lives and what the future holds? What steps can you take to learn more about your beneficiary’s hopes and dreams?
3. How frequent are home visits for your beneficiaries? How helpful are these visits to you and the beneficiary?
4. Does your trust have procedures and checklists in place to help observe surroundings during home visits or ask key questions during check-ins? Are there any suggested items on our checklist that you may want to incorporate in your trust organization’s documents?
5. How frequently does your trust tweak a spenddown plan with a beneficiary and supporters? How central is the beneficiary in leading this planning process?
6. Are you aware of all the supports and services in your community? What steps can you take to improve your knowledge and your trust’s knowledge of available supports?
7. How do you currently handle debates or disagreements about rejected disbursement requests? How can your trust shift this conversation?

**Shared Resources**

* [Identifying Public Benefits and Systems](https://thearc.org/wp-content/uploads/2021/12/3.1-Identifying-Public-Benefits-and-Systems.docx)
* [Learning About Existing and Wanted Supports and Services](https://thearc.org/wp-content/uploads/2021/12/3.2-Learning-about-Existing-and-Desired-Services.docx)
* [Updating Support and Service Arrangements and Goals](https://thearc.org/wp-content/uploads/2021/12/3.3-Updating-Support-and-Service-Arrangements-and-Goals.docx)
* [Matching Supports and Services With Life Goals](https://thearc.org/wp-content/uploads/2021/12/3.4-Matching-Supports-and-Services-with-Life-Goals.docx)
* [Addressing Disagreements Around Supports and Services](https://thearc.org/wp-content/uploads/2021/12/3.5-Addressing-Disagreements-about-Supports-and-Services.docx)

**Share With Us**

Did any of these tips and resources spark a memory or story you want to share, or a resource or tool you need? [Complete this form to contact us and share your ideas](https://thearcus.surveymonkey.com/r/7F5N5DC)!

Date Revised: December 8, 2021.