# Beneficiary Support Toolkit for Trust Professionals


# Chapter 3: Evaluating Needed Supports and Services

**Learning About Existing and Desired Services**

It is important to learn about supports and services a beneficiary already has and what supports or services they may need or be interested in. Services may not include just what people are eligible to receive or know to ask for but also should include supports to help them do the things they want.

Below, we have provided a checklist you can use to learn more about the beneficiary’s current services, what people do each day, what they love and hate, and how they want to grow in their life.

**Services That People Receive Right Now**

[ ]  We asked the beneficiary about whether they receive any help or services to do the following activities:

[ ]  Activities of daily living, like dressing, bathing, grooming, toileting, and moving around

 [ ]  Cooking and eating

 [ ]  Doing household chores

 [ ]  Managing money and budgeting

 [ ]  Transportation

[ ]  Other activities: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  We asked the beneficiary about any of the following benefits that they may receive:

[ ]  Case Manager

 [ ]  Cash or Food Benefits

 [ ]  School-provided services

[ ]  Employment services

 [ ]  Job Coach

 [ ]  Day program

 [ ]  Respite services

 [ ]  Other services: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  We asked the beneficiaries what they do each day of the week. We asked any probing questions to identify:

 [ ]  Any major activities that a person does each day

 [ ]  Any supports or services that were not already listed above

[ ]  We asked the beneficiaries about their mental health services and history. We asked any probing questions to identify:

 [ ]  Any mental health or behavioral health services they use regularly

[ ]  Whether they have had any past hospital stays due to mental health issues

[ ]  We have received the name and contact information for anyone who provides the services or benefits identified above, if the beneficiary or family is willing to provide it.

[ ]  We asked the beneficiary whether they are on the waiting list for any services or benefits and the status of applications.

[ ]  We asked the beneficiary whether they have any devices or tech that they use regularly. If so, we have listed each item and their purpose.

**What Beneficiaries Want From Services**

[ ]  We asked the beneficiary:

 [ ]  What they like and don’t like doing each day

 [ ]  What they want to do more and less of

 [ ]  What help they want but are not getting right now

[ ]  What things they want to do in the future - what their goals and dreams are

[ ]  We asked them who they trust to do more of what they want and less of what they do not want.

[ ]  If the beneficiary shared about mental health issues currently or in the past or is willing to share the information below, we asked them:

 [ ]  Whether there are any triggers or things that upset them

 [ ]  Whether they have any preference on the gender of people they are alone with

[ ]  Whether there have been any issues of hoarding things in the past

[ ]  We asked them about what help they want and expect from the trust to achieve their goals.

[ ]  We discussed ways that the trust could help them get the help or support they need to make these changes.

**For Trust Staff – Next Steps**

[ ]  We have added the information provided by the beneficiary to their records.

[ ]  We have added any current supports and services to our communication records and lists.

[ ]  If we heard concerning information and suspect potential abuse or neglect from those providing services, we have taken next steps in accordance with our trust’s policy on reporting suspected abuse or neglect.

[ ]  We have provided contact information and encouraged the beneficiary to work with trusted supporters to apply for additional public benefits for which they may be eligible.

[ ]  We have looked into ways the trust could support a beneficiary’s goals or wants and taken steps to incorporate those goals into the beneficiary’s budget, when possible.

**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.