

Benefits Analysis Review Tool

Rating Scale: Each item should be measured on a scale of 1 to 4.

1 = not adequate/needs improvement, 2 = adequate/needs improvement, 3 = satisfactory/needs improvement, 4 = Excellent

	Max	Score	Description	Reviewer Comments
1. Specific to Consumer				
Work Goal Addressed	4		The consumer's work goal and current work situation are clearly described in the report. This information is incorporated into the use of work incentives and other benefits. If goal of consumer is not specified, then it must be indicated within the report.	
Consumer Information Consistent	4		Income, family size, and disability information remains consistent throughout the report.	
Report is original to consumer	4		Report was written for individual. Consumer's questions and concerns are clearly stated and addressed in report. The consumer is able to use the information in the report for his/her specific work goal and situation because it applies to his/her benefits.	
Section Total:	12			
2. Benefits are Verified				
Verification of benefits is in writing	4		None of the information in the report is based on conjecture or assumptions. The report contains evidence that the benefits specialist contacted the appropriate agencies (SSA, County Economic Support, etc.) to verify all of the benefits the consumer receives.	
Section Total:	4			
3. Appropriate Information Provided				
All benefits person is eligible for are included	4		Report includes all benefits the person is receiving and is eligible for.	
Information not pertaining to work & benefits is not included	4		Information that does not impact the individual's work goals or benefits is absent from report. The report does NOT include benefit information that does not apply to the consumer's situation.	
Section Total:	8			
4. Language and Readability				
Acronyms Described	4		Acronyms are explained before used in report. Acronyms are accurate.	
Sentence structure	4		Sentences are of reasonable length. Sentences do not include more than two concepts, and should not be more than 15-20 words.	
Spelling/Grammar	4		Report is free of spelling, grammar and punctuation errors.	
Readability/Formatting	4		Things such as white space, headings, bullets, indentation, etc. are used to support readability.	
Section Total:	16			
5. Organization				
Information provided in logical order	4		Benefits are fully explained in the way in which they affect each other. As an example, SSI would not be described before SSDI if a person is receiving both benefits.	
Information grouped appropriately	4		Topics are organized in a logical order. For example, SSI would not be explained before SSDI as SSI is affected by SSDI. Also, all topic related information is found in the same section of the report. For example, all SSDI information can be located in the same section of the report.	
Report volume	4		The information provided to the consumer in the report matches the consumer face sheet checklist. Information is not repeated resulting in the report being longer than necessary.	
Consumer specific information can be found easily	4		The consumer specific information is easily identifiable and clearly marked within the report. For example, the amount of TWP months available to a person are not buried in a paragraph. This information is highlighted, or otherwise marked for the reader.	
Section Total:	16			
6. Accuracy				
Social Security Benefits	4		All information pertaining to Social Security Benefits and contact information is accurate. The rules and policies are clearly defined.	
Health Insurance	4		All information pertaining to Health Insurance Benefits and contact information is accurate. The rules and policies are clearly defined.	
Other Benefits and Work Information	4		All information pertaining to other benefit programs and work information is accurate. The rules and policies are clearly defined.	
Section Total:	12			
7. Referrals				
Contact information and referrals are included	4		Agency contact information is included for each benefit identified in report. Also, referrals to possible programs to assist the individual while working are included in report.	
Section Total:	4			
Total Score				
Grand Total:	72			