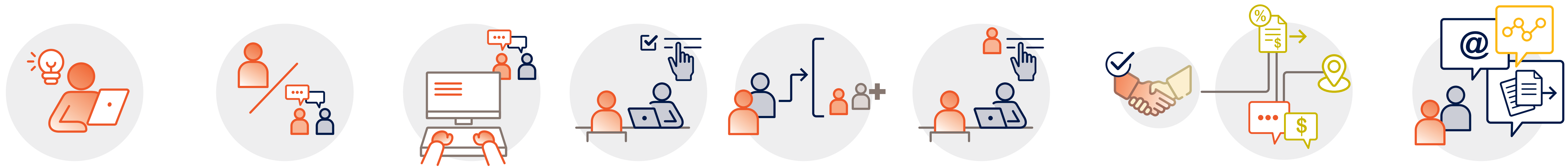
Service model
Increasing access to benefits with the Disability Benefits Compass

The process of applying for disability benefits can be complex and overwhelming. There are many different disability benefits – each with different requirements and eligibility criteria. It is often unclear to people what they need to do to enable a successful application.

This map details an access to benefits service model for organizations to use, with the Disability Benefits Compass, to provide no-cost services to support people with disabilities to access the government benefits that they are eligible for.

This map was developed through consultation with the Access to Benefits for Persons with Disabilities project partners: Disability Alliance BC, Plan Institute, and Social Research and Demonstration Corporation. The Access to Benefits for Persons with Disabilities project is funded by the Government of Canada's Social Development Partnerships Program Disability.

	Learn about disability benefits	Client self-advocates and/or requests meeting with advocate	Prepare for meeting with advocate	Meet with advocate	Apply for benefits	Meet again with advocate	Staff books referral meetings (Tax filing, money conversation, other)	Follow-up action items
Steps 1	1.1. Inbound request (via email, phone, walk-in, online signup)	1.2. Wait for meeting with advocate	1.3. Schedule first meeting between the client and advocate	1.4. First meeting between client and advocate	1.5. Get benefit application completed	1.6.a. Book follow-up meeting between client and advocate 1.6.b. Client refuses a follow-up meeting with advocate	1.7. Meetings with advocate completed 1.8.a. Staff refers client to tax filing program and/or books referral meeting for client 1.8.b. Staff refers client to money conversation, makes referral to other programs and/or gives tools and resources for self-study 1.8.c. Staff refers client to other organizations and/or books referral meetings for client	1.9. Staff follows-up with client
Client 2	2.1. Contact support organizations	2.2. Use the **Disability Benefits Compass, Benefits Wayfinder** and DABC resources	2.3.a. Receive meeting date with advocate 2.3.b. Prepare for advocate meeting using **Disability Benefits Compass** and checklist. Return completed consent and intake forms	2.4.a. Arrive for meeting with advocate 2.4.b. Bring completed consent and intake forms, if not already sent 2.4.c. Bring any questions and information needed for benefit application or inquiry	2.5. Bring missing or additional information required to complete application. Set up medical practitioner appointments, request supplementary documents/medical files	2.6. Gather any missing information for follow-up appointment	2.7. Meetings with advocate completed 2.8.a. Note tax-filing meeting date or schedule own meeting 2.8.b. Note money conversation meeting date or schedule own meeting and/or review tools and resources received 2.8.c. Note other organization meeting dates or schedule own meeting	2.9. Contact advocate if application is denied or if it is time for reapplication



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3 Administrative	3.1.a. Receive inbound request and pre-screen for service 3.1.b. Refer client to **Disability Benefits Compass** and **Benefits Wayfinder**, refer to another organization, schedule with an advocate or put on waitlist 3.1.c. Log in client tracking database/spreadsheet	3.2.a. Schedule meeting with advocate or place client on waitlist. Send **Disability Benefits Compass** with instructions to client to review and prepare questions and documents for meeting with advocate 3.2.b. Refer client to other support organizations	3.3.a. If not already sent to client, send **Disability Benefits Compass** to review and to prepare questions and documents for future meeting with advocate 3.3.b. Send consent form to client to return before meeting with advocate					3.4.a. Book tax-filing meeting for client or give client the contact information of the referral agency 3.4.b. Book money conversation meeting for client or give client the contact information of the referral agency or give client financial literacy tools and resources for self-study 3.4.c. Book other organization meeting for client or give the client the contact information of the referral agency	
4 Advocate	4.1.a. Receive inbound request and pre-screen for service 4.1.b. Action inbound request 4.1.c. Log in client tracking database/spreadsheet	4.2. Meet with other clients as scheduled	4.3.a. Review waitlist, contact client once meeting is scheduled 4.3.b. Review referral spreadsheet, contact client and update client database 4.3.c. Send client consent and intake forms to complete. Send **Disability Benefits Compass** with instructions to review and prepare questions before meeting	4.4.a. Complete client consent and intake forms 4.4.b. Complete client data sheet 4.4.c. Work with client on their inquiry and/or application 4.4.d. Schedule follow-up appointment with client if needed	4.5.a. Help client complete application 4.5.b. Update client files 4.5.c. Training and refresher courses for advocates (use of **Disability Benefits Compass** and **Benefits Wayfinder**), keep materials and tools current 4.5.d. Track tasks in online management tool	4.6. Track client progress and continue application completion	4.7. Update client tracking spreadsheet	4.8.a. Follow-up with client 4.8.b. Book tax-filing meeting for client or give client the contact information of the referral agency 4.8.c. Book money conversation meeting for client, give client the contact information of the referral agency, or give client financial literacy tools and resources for self-study 4.8.d. Book any other referral organization meeting for client or give the client the contact information of the referral agency	4.9.a. Call, email or meet with client in 3 months 4.9.b. Annual or periodic check-in with client 4.9.c. Restart process if client requests support on denied or renewal applications 4.9.d. Close client file if no client reply after 6 months
5 Organization actions	5.1.a. Collect website metrics 5.1.b. Track metrics of client requests and actions taken in client database/spreadsheet 5.1.c. Workshops on the **Disability Benefits Compass**, **Benefits Wayfinder**, DABC and other organizations' resources				5.2. Maintain **Disability Benefits Compass** by informing Prosper Canada about new disability benefits, changed eligibility, new FAQ, new tips				5.3. Track metrics of client requests and completion status in client database/ spreadsheet

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