

## Supervisor's Recommendation Form

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 provide benefits coaching. The certification does not include supervision and ongoing monitoring of benefits coaching. 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.

### 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.

### Certification Requirements

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

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

***Approximately 51 hours to complete***

The self-paced training will be 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 DBI01 website, and procedures for verifying benefits. The lessons must be completed in a period of three 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.

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

***Approximately 17 hours to complete***

The instructor-led training will be delivered as a series of webinars held over a period of four days. The webinars will 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. *Webinars are generally scheduled Mondays, Tuesdays, and Thursdays from 10:00am–3:00pm, and Wednesdays from 10:00am–12:00pm (schedule subject to change).*

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Certification Requirements, continued:

- **STEP 3: Practical exam**

- ***Approximately 22 hours to complete***

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.

- **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 Hub. 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 Hub.

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**Applicant and supervisor information:**

Applicant's name: \_\_\_\_\_

Supervisor's name: \_\_\_\_\_

Supervisor's email address: \_\_\_\_\_

**Supervisor's recommendation:**

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.

\_\_\_\_\_  
Supervisor signature

\_\_\_\_\_  
Date