

Division of Vocational Rehabilitation (DVR) Technical Specifications: Work Incentive Benefits Analysis Services

Effective July 1, 2016 to June 30, 2017

Description of Service Category

Benefits Consultation, Work Incentive Benefits Analysis Meeting, Work Incentive Benefits Analysis Update and Report, and Work Incentive Benefits Plan Meeting are a set of services intended to assist consumers who receive Social Security disability benefits and possibly other public benefits in navigating benefit, entitlement, and economic assistance programs in an effort to address questions or concerns they may have related to work and earnings on their way to achieving self-sufficiency.

One goal of providing this service to DVR consumers is to assist them in determining income levels to achieve economic self-sufficiency. This assistance may include providing information on eligibility criteria, work incentive programs, or different benefit options.

Work Incentive Benefits analysis is intended to support a person with a disability in understanding the relationship between their employment goals and their benefits. These services should be provided throughout the VR process but are especially important when changes to employment or benefits occur. It is generally a point-in-time analysis, and additional information and/or analysis over time may be needed.

There is no set order that services must be provided. Services should be determined based on consumer's current needs.

[Link to Roles and Responsibilities Document\(s\)](#)

Note: All elements listed in the Roles and Responsibilities document serve as part of the technical specifications and are required to be completed by the Service Provider.

SERVICE	Purpose	TIMEFRAME(S)	DELIVERABLES	PAYMENT
Benefits Consultation Period	Assist consumers in understanding how improving their financial progress will impact their benefits.	90 days from date of authorization	1.) Benefit Consultation Report 2.) 3 required contacts with consumer/DVR counselor	\$300
Work Incentive Benefits Analysis Meeting	Detailed analysis of (potential) impact of earnings on the full array of the consumer's benefits.	45 days from date of authorization	1.) Work Incentive Benefits Analysis Report. 2.) Required meeting with consumer/DVR counselor to review report. 3.) Up to 3 additional	\$900

			meetings between consumer and service provider within a 12 month period to address updates, questions, and/or concerns. 4.) For each additional meeting, a report specifying any changes in the initial analysis will be required.	
Work Incentive Benefits Analysis Meeting Update *After 12 month period from original Work Incentive Benefits Analysis. Fee is per referral.	Discuss changes in benefits/status and address consumer questions for appropriate vocational planning.	45 days from date of authorization	1.) Work Incentive Benefits Analysis Meeting Update Report	\$100
Work Incentive Benefits Plan and Meeting *Consumer must have secured employment to receive this service	Assist consumer in accessing work incentives.	45 days from date of authorization	1.) Work Incentive Benefits Plan, Meeting and Report 2.) Required meeting with consumer/DVR counselor to review report.	\$700
Plan to Achieve Self Support (PASS)	Development of a PASS Plan.	30 days	1.) PASS Plan 2.) Required meeting with consumer/DVR counselor to review report.	\$600

An Authorization for Services is required from DVR before any services can begin.

Services Provided-Benefit Consultation Period and Report

- This service may be authorized at any time but is not intended to replace a full work incentive benefits analysis. This service should be used when the consumer has a few questions or concerns they want answered and a full work incentive is not needed.
- This service may serve as the starting point to assist consumers in understanding the benefits that they receive from the federal and local governments; and how improving their financial progress will impact these benefits.

- A consultation period consists of at least three significant contacts with the consumer and counselor as needed over a three month period. This is a requirement. After the three month period, the consumer may be referred for other services. The service is intended to support ongoing benefit consultation with a Work Incentives Benefits Specialist provider as a part of a consumer's resource team.
- Initial planning meeting with the DVR consumer should include all of the following:
 - Complete intake of household
 - Obtain signed releases & verify benefits (after initial meeting)
 - Share handouts and discuss
 - Student Earned Income Exclusion
 - SSI eligibility and general deeming
 - List of time points for changes with benefits such as consumer's change in employment, marriage, new benefits
 - Discuss next steps with family and VR and schedule follow up research and contacts as needed
 - Answer questions/consult as needed as progress is made
 - Consult with DVR counselor and participant to determine when a full work incentive benefits analysis might be appropriate and what to expect from the full analysis.
 - Communication and information should be provided to the consumer in a form which is accessible to their individual needs.
 - Preparation of a plan for future consultation assistance needed and to be provided to the consumer.

[Link to Benefit Consultation Period and Report](#) (DVR-18045-E)

Services Provided-Work Incentive Benefits Analysis, Meeting and Report

- A Work Incentive Benefits Analysis is an individualized, comprehensive, “foundational” benefits counseling service provided to Social Security Administration (SSA) benefit recipients. The purpose of the service is to provide a detailed analysis of the (potential) impact of wages/earnings on the full array of public and private benefits, entitlements, and other forms of economic assistance the consumer receives, to support the his/her ability to make informed decisions about work and earnings toward their goal of becoming self-sufficient.
- Particular emphasis is given to work incentives, provisions in the benefits that are designed to support work and self-sufficiency. A written report detailing the results of the analysis is provided to both DVR and the consumer. ***Please note that all funding sources (please see a list of possible funding sources below) must be verified by the service provider, this includes state, federal, and local benefits.***
- The written findings are reviewed by the service provider with the consumer and DVR Counselor in a 3-way meeting (mandatory for payment for the service). It is recommended this meeting be held in-person, with all parties in attendance, given the complexity of the material that may be discussed. The meeting is an opportunity for both consumer and DVR Counselor to review the information in the report, ask questions, address any specific concerns, and to ensure the consumer has all information relevant to benefit programs and work earnings needed to make informed decisions about employment planning. The meeting will also include discussion on the role of Social Security’s Ticket to Work (TTW) program and the responsibilities of the consumer in reporting income to Social Security and other benefit providers.

- The results will be explained to the consumer in his/her preferred mode of communication. In addition; ***up to 3 additional meetings between the consumer and service provider are to be made available within a 12 month period*** following the initial meeting, to discuss changes in benefits/entitlement/funding status and address additional consumer questions/concerns as necessary for appropriate vocational planning.
 - An updated report specifying any change in the initial analysis is required to be provided to the consumer and DVR.

Potential Funding Sources (Note: This list is not exhaustive; the Service Provider is responsible for determining benefit/funding/economic assistance sources in each individual case):

- Social Security Administration (SSA) disability programs and work incentives (SSDI, SSI, Ticket to Work, deeming)
- Private disability insurance programs
- Veteran's Benefits
- Unemployment Insurance
- Worker's Compensation
- Health insurance programs
 - Medicaid
 - Medicaid Purchase Plan (MAPP)
 - Long Term Care (Medicaid Waivers, Family Care/I Respect I Self Direct/ Self Directed Supports, etc.)
 - Medicare
 - Medicare Savings Programs (MSP)
 - Medicare Part D low income subsidy
 - BadgerCare Plus
 - Private health insurance
 - Other insurance programs as appropriate for the individual (e.g. BadgerCare Plus, Medicare Supplemental policies, Medicare Advantage Plans)
- FoodShare
- Housing assistance programs
- Energy assistance
- Information on spouse and children's benefits and entitlements, if relevant

[Link to Work Incentive Benefits Analysis Meeting and Report](#) (DVR-18046-E)

Services Provided-Work Incentive Benefits Analysis Meeting Update and Report

- This service is additional meetings between the consumer and service provider after the 12 months following the initial work incentive benefits analysis meeting to discuss changes in benefit/entitlement/funding status and address additional consumer questions/concerns as necessary for appropriate vocational planning.
- An updated report specifying any changes in the initial analysis will be provided to the consumer and DVR. This service can be used multiple times if needed. This service can be used to update the Work Incentive Benefits Analysis to reflect the consumer's current job information when obtaining employment.

[Link to Work Incentive Analysis Meeting Update and Report](#) (DVR-18047-E)

Services Provided-Work Incentive Benefits Plan, Meeting and Report

- This service can be authorized when the consumer has employment and would like help accessing work incentives.
- A comprehensive Work Incentive Benefits Plan must outline specific action steps to be taken, the responsibilities of the individual, resolution of benefits issues, and deadlines for completion of tasks to use work incentives.
- The report and meeting will also include the role of Ticket to Work and the process and responsibilities and the responsibilities of the consumer in reporting income to Social Security and other benefit providers. . The provider will be available to answer questions/consult as needed as progress is made towards accessing work incentives.
- The results are reviewed with the consumer, DVR Counselor, and the service provider in a mandatory 3-way meeting. This meeting is an opportunity for both consumer and DVR Counselor to review the information in the report, ask questions, address any specific concerns, and to ensure the consumer has all needed information relevant to benefit programs and work earnings. The results will be explained to the consumer in their preferred mode of communication.

[Link to Work Incentive Benefits Plan Meeting and Report](#) (DVR-18048-E)

Creation of a Plan to Achieve Self-Support (PASS)

- As an addendum to a Work Incentive Benefits Plan, Meeting, and Report, the development of a Plan to Achieve Self-Support (PASS) can be included for an additional fee. This sub-service cannot be authorized unless a Work Incentives Benefits Plan has been previously completed. The PASS is a specific work incentive and thus, must be authorized following or in conjunction with the Work Incentives Benefits Plan, Meeting, and Report.
- The objective of a PASS is to foster economic self-sufficiency among consumers receiving monthly SSI and/or SSDI benefits and simultaneously pursuing or sustaining employment. Ideally, the creation of a PASS is authorized when consumers have additional expenses to achieve a work goal that is not paid for by a third party (e.g., family members, Division of Vocational Rehabilitation, managed care). It requires the beneficiary to pay a portion of the expenses by setting aside monthly benefits and/or other income to fund the employment-related expense(s). A PASS must outline a specific employment goal and be tailored to the needs of the individual. It includes a projected timeline for completion of the goal and the interval steps that will be taken for its achievement.
- The PASS must be completed on form SSA-545 for review by the Social Security Administration. It must be signed by the consumer and his/her representative payee, if applicable. The contents of a PASS must be developed by the consumer, with assistance from the service provider, using the consumer's preferred mode of communication. The finalized PASS must be jointly reviewed by the consumer, the DVR counselor, and the service provider.
- Service covers through submission of PASS to SSA, including resubmittals needed to achieve approval from SSA.

Service/Reporting Requirements

Statewide DVR service and reporting elements are located in the required reporting template(s) found here: [Link to Required DVR Statewide Service Report\(s\)](#)

Reports are due within 5 business days of the end of the service or previous month if the service is continuing.

****If the service provider is seeking to use their own reporting template, the report must contain all the elements and follow the same sequence in the required DVR reporting template. Please email the DVR Program Development Specialist at DVRSpecialContracts@dwd.wisconsin.gov to submit a reporting template and request for approval.*

Billing Requirements

Invoices for services should be submitted as described on the Authorization for Services, also referred to as the purchase order. Invoices must be received by DVR within 60 days of completion of the service. Properly submitted invoices will be paid within 30 days of receipt when reports and services have been delivered and accepted as specified.