

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

### Effective July 1, 2014 to June 30, 2015

Benefits Analysis, Work Incentives Benefits Planning and Work Incentives Benefits Planning Follow-up are a set of services intended to assist persons with disabilities, who receive Social Security disability benefits and other public benefits, in negotiating benefit, entitlement, and economic assistance programs with issues relating to work and earnings.

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

Benefits assessment is intended to support a person with a disability in understanding the relationship between their employment goals and their benefits. Benefit Analysis may be provided throughout the VR process but especially 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.

#### **Services Provided**

Benefit Analysis, Meeting and Report

Work Incentive Benefits Plan, Meeting and Report

Work Incentive Benefits Plan Follow-up Support, Report, and/or Meeting

#### **Referral Process for all Services**

1.) Consumer and Counselor meet and discuss service to be provided and responsibilities and roles of each party. Consumer makes a choice of provider available using standard information. Note: Consumer may elect to conduct research prior to selection of service provider with assistance from DVR.

2.) Counselor/DVR staff contact service provider and provide final meeting date options to the provider to schedule the required meeting within 60 days of service authorization. No meeting is required for the Work Incentive Benefits Plan Follow-up service. Referral information required at time of authorization: consumer name, phone number, written description of reason and purpose for authorization, any special accommodation needs, preferred communication/learning style and any specific questions or concerns to address. Service is authorized.

3.) Meeting is scheduled with DVR consumer, DVR staff and service provider, takes place and report is provided.

## **Reporting/Billing Requirements**

A report meeting the technical specifications should be completed within five (5) days of completion of the service and not to exceed 60 days from referral/receipt of authorization for Benefit Analysis and Work Incentive Benefits Plan services, and not to exceed 30 days from referral/receipt of authorization for Work Incentive Benefits Plan Follow-up services. DVR will pay the applicable fee for the Benefits Analysis Service upon completion of an acceptable report (one that meets the technical specifications), and the final face to face meeting requirement. The follow-up service does not require a meeting though one can be requested by the DVR consumer. No additional fees will be provided for requested meetings.

## **Service Provided - Benefit Analysis, Meeting and Report**

This service is a highly individualized, comprehensive written summary of all benefits, entitlements, and economic assistance programs relevant to a particular consumer. Clear, concise information is provided on how work earnings can affect all of those programs. Particular emphasis is given to work incentives, provisions in the benefits that are designed to support work. The Benefits Analysis should enable a consumer to make informed choices about work and earnings. A Benefits Analysis is considered a comprehensive, "foundational" benefits counseling service.

The written findings are reviewed with the consumer, DVR Counselor, and the benefit specialist 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 meeting will also include discussion on the role of Social Security's Ticket to Work program, and if appropriate, the process and responsibilities of the consumer in reporting income to DVR for the required time period. The results will be explained to the consumer in their preferred mode of communication. It will preferably be conducted prior to IPE development process, but may be provided later in the VR process to provide more information for refinement of an employment goal.

### **Required Service Elements;**

- Direct contact with the consumer via phone or face to face meeting,
- Individualized to the consumer,
- All benefit information must be verified from the appropriate sources,
- Mandatory meeting between the consumer, DVR counselor and benefits specialist within 60 days of authorization.
- Communication and benefits analysis information discussion should be conducted in a manner meeting the individual needs of the consumer.

### **Required Reporting Elements:**

- Written in an organized, clear, concise, and readable style including definitions of acronyms,
- Current work and/or work goal information (to the extent to which the work goal has been developed)
- Consumer demographic information relevant to benefits programs (living arrangement, marital status, dependents, age, etc.),
- Written statement verifying accurate receipt of all public and private benefits, entitlements and assistance programs (with a description of each),
- Description of associated work incentives,

- Ticket to Work eligibility (description of program, access and resource information, Employment Networks, Maximus website and other contact information),
- Thorough explanation of wage reporting requirements for Ticket to Work if applicable,
- Other individualized benefit information including current amount received for each and/or nature of benefit,
- Accurate information on all relevant public and private benefits, entitlements and assistance programs.

**Programs May Include:**

- Social Security Administration (SSA) disability programs and work incentives
  - SSDI
  - SSI
  - Ticket to Work
- 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 Core, BadgerCare Plus Basic, Health Insurance Risk Sharing Plan, Medicare Supplemental policies, Medicare Advantage Plans)
- FoodShare
- Housing Assistance Programs
- Energy Assistance
- Information on spouse and children's benefits and entitlements if relevant

## **Service Provided - Work Incentive Plan, Meeting and Report**

A Benefits Analysis is required before a Work Incentive Plan can be developed. A Benefits Analysis is considered a comprehensive, “foundational” benefits analysis service. An authorization and referral for this service can be done for DVR consumers with an established employment goal, those interested in maximizing earnings, or have previously identified actions that must be taken to access work incentives. It may be conducted prior to Individualized Plan for Employment development process for consumers with a clear employment goal and intending to work and maximize earnings, but could be done later. Information will be used to provide a comprehensive work incentive plan using the components identified in the benefits analysis along with specific action steps, the responsibilities of the individual, resolution of benefits issues, and deadlines for completion of tasks to use work incentives. The report must include an outline of what would be required to achieve economic self-sufficiency with employment, work incentives and other resources. The report and meeting will also include the role of Ticket to Work, the process and responsibilities of the consumer in reporting income to DVR for the required time period.

The results are reviewed with the consumer, DVR Counselor, and the benefit specialist 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. It will preferably be conducted prior to IPE development process, but may be provided later in the VR process to refine an employment goal.

### **Required Service Elements:**

- Direct contact with the consumer via phone or face to face meeting,
- Individualized to the consumer,
- Benefit information must be verified from the appropriate sources,
- Mandatory meeting between the consumer, DVR counselor and benefits specialist within 60 days of authorization,
- Communication and benefits analysis information discussion should be conducted in a manner meeting the individual needs of the consumer.

### **Required Reporting Elements:**

- An outline of what would be required to achieve economic self-sufficiency with employment, work incentives and other resources,
- A written plan outlining specific task(s), the person(s) responsible, target dates and completion dates,
- Ticket to Work information if the consumer will be working at trial work wage level or more (description of program, access and resource information, Employment Networks, Maximus website),
- A thorough explanation of wage reporting requirements for Ticket to Work if applicable,
- Categories for the development of specific action steps must include:
  1. Utilization of Employment Services and Supports (DVR, Family Care, etc.)
  2. Resolving Existing Benefits issues (SGA level, overpayments and notification, etc.)
  3. Managing Federal, State or Local benefit programs (coordination with payee, etc.)
  4. Managing SSA Benefits and Work Incentives (organize pay stub collection, establishment of an IRWE, etc.)

5. Planning for future healthcare needs (Application for BadgerCare, etc.)
6. Follow-up contact plan (Who to contact for help with SSA review, etc.)

**Required Meeting Elements:**

- Detailed discussion of rationale for possible follow-up service need based on individual disability or circumstance,
- Beneficiary background information,
- Employment and earnings,
- Resources and access to other benefit eligibility (housing, child care, eldercare, etc.),
- Federal and State benefits,
- Health insurance eligibility,
- Work expenses,
- Work incentives individualized access,
- Work scenarios based on the stated employment goals
- Answers to specific referral questions,
- Ticket to Work if the consumer will be working at trial work wage level or more (description of program, access and resource information, Employment Networks, Maximus website)
- A thorough explanation of wage reporting requirements for Ticket to Work,

**Service Provided - Work Incentive Benefits Plan Follow-up Report, and/or Meeting**

A Benefits Analysis and Work Incentive Benefits Plan are required before a Work Incentive Plan Follow-up Report can be developed. A Benefits Analysis is considered a comprehensive, “foundational” benefits analysis service. A Work Incentive Benefits Plan is considered to be a “how-to” guide for use of work incentives. Before the follow-up service can be authorized the consumer and DVR counselor must review the previous assessment reports and other information and make a determination about if they can readily obtain the needed information from resources previously provided. This service can be authorized when a consumer has a job offer that varies dramatically from a work scenario already provided, or when they already have a job but need more information in order to make a decision about accepting a raise, going from part time to full time, etc. It may also be authorized based on individual high level of support need to implement the benefits plan as previously discussed.

It will generally be conducted after employment is obtained and can be provided as a post-employment service. This report will be very specific to the consumer. This report will use current actual employment wage and benefit data for the DVR consumer to understand the impact and timeline of changes in their benefits due to their participation in employment. The results will be explained to the consumer in their preferred mode of communication, the consumer can ask to have a face-to-face meeting to clarify and discuss the results. The report and/or meeting will also include the role of Ticket to Work when applicable, the process and responsibilities of the consumer in reporting income to DVR and others for the required time periods. If the time needed to provide the follow-up service exceeds 3 hours (not including a requested meeting) based on a complex situation, additional hours may be authorized at the discretion of the DVR on a case by case basis though this is thought to be a rare occurrence.

**Required Service Elements:**

- Direct contact with the consumer via phone or face to face meeting,
- Individualized to the consumer,
- All benefit information must be verified from the appropriate sources,

- Communication and benefits analysis information discussion should be conducted in a manner meeting the individual needs of the consumer.

**Required Reporting Elements:**

- Updated work wage, hours and benefit information.
- Ticket to Work if the consumer will be working at trial work wage level or more (description of program, access and resource information, Employment Networks, Maximus website)
- A thorough explanation of wage reporting requirements for Ticket to Work,
- Impact of potential changes in wages, hours and benefits
- Selection, use and benefits of Employment Networks
- Reporting responsibilities and timelines for all public or private benefits

Other related services (PASS plans) may need to be separately negotiated based on the needs of the consumer. The services detailed here are intended to provide a framework for commonly used and widely available services. If the descriptions do not meet the needs of the individual consumer please consult with the DVR consumer, The DVR counselor, the DVR Supervisor and/or the service provider to determine the best course of action.