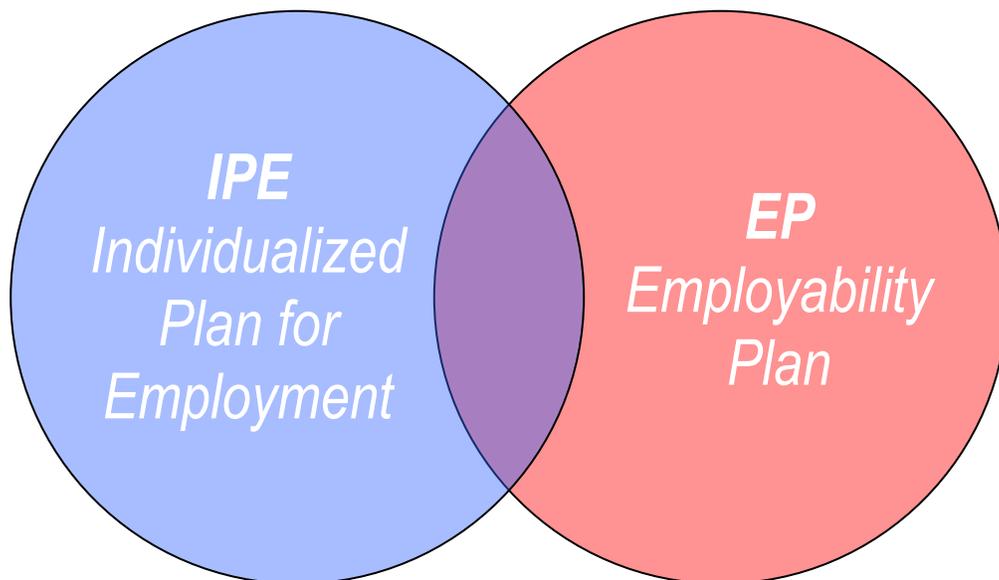


# Technical Assistance Guide

*Working Together to Assist Individuals with Disabilities in Achieving Their Employment Goals*



Wisconsin Division of Vocational Rehabilitation  
&  
Wisconsin Works Program

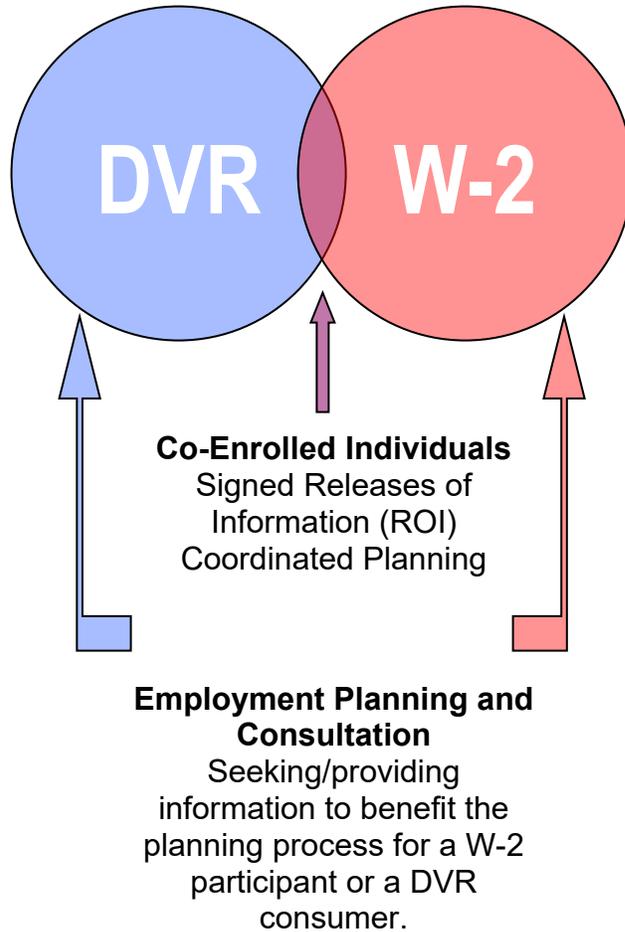
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## **Introduction**

This Technical Assistance Guide (TAG) was developed in partnership between the Wisconsin Department of Workforce Development (DWD) and the Wisconsin Department of Children and Families (DCF). DWD's Division of Vocational Rehabilitation (DVR) and DCF's Division of Family and Economic Security, Bureau of Working Families led the effort. The TAG was specifically designed to assist staff who work with individuals with disabilities who are either consumers in the DVR program or participants in the W-2 program. These individuals may or may not be co-enrolled.



This guide can be used as a framework for improved communication, coordination, and provision of services for individuals with disabilities who are working to obtain, maintain, or advance in employment. It covers areas such as:

- Employment Planning and Consultation
- Referral and Eligibility Determination
- Coordination and Employment Planning for Co-Enrolled Individuals
- Services Provided by DVR and the W-2 Program
- Funding and Cost Sharing
- Frequently Asked Questions
- Program and Other Related Information

A listing of acronyms and definitions used in this guide can be found in Appendix 1.

## **Enhancing Communication with Program Participants**

The following information is provided to both DVR and W-2 staff and is meant to enhance communication and understanding by program staff and individuals with disabilities throughout the process of assisting program participants in achieving their employment goals.

### **Modes of Communication and Accommodations:**

- Both DVR and W-2 are responsible for ensuring that information is shared in an appropriate format for an individual's needs.
- The best way to learn if an individual has any specific needs is to ask them directly.
- The individual should be provided assistance and accommodations as needed.

Examples:

- An individual with a visual impairment may need documents provided in large print.
- Individuals may prefer written information, verbal information, or both.

### **Benefits of coordination**

When an individual is co-enrolled, federal and state laws require that the W-2 and DVR programs each develop a plan for employment. W-2 uses an Employability Plan (EP) and DVR uses an Individualized Plan for Employment (IPE). However, the two agencies can and should coordinate the two plans and the services necessary to support them. The individual's goals for each program may relate to a similar career path, but the timelines for each program's goals may differ. For example, W-2 may provide job skills training that will help the individual with their short-term employment goal. Upon completing the job skills training, DVR may support the individual in obtaining a post-secondary degree that will enable them to fulfill their longer-term employment goal(s).

When an individual may be served by both DVR and W-2, or if they are currently co-enrolled in both programs, it is vital for staff to explain the importance and benefits of allowing for coordination of services. Coordination between DVR and W-2 may:

- Give the individual access to a greater range of supports and services to meet their needs.
- Expedite the achievement of the individual's employment goals.
- Allow the individual access to the expertise, skills, and knowledge of both DVR and W-2 staff.
- Ensure that the individual's IPE and EP align as much as possible and, when appropriate, work toward the same outcomes.
- Count certain services and supports provided under the IPE toward W-2 participation requirements under the EP.
- Eliminate repetition of similar activities and reduce the individual's overall workload.

## **Individual Informed Choice**

It is imperative for program participants to be:

- Involved in all decisions made throughout the process (e.g., employment goals, services, service providers, progress measures, etc.).
- Allowed time for discussion and questions throughout the process.
- Aware of how their decisions will impact their participation in the DVR and W-2 programs.

Examples:

- An individual is co-enrolled in both programs, but has not signed the release of information for DVR and W-2 to communicate. The individual is requesting transportation services from DVR. DVR is required to seek comparable benefits. DVR is unable to verify if the consumer is receiving the same service from W-2. In this situation, DVR services may be delayed or denied.
- An individual may feel they are not benefiting from one or the other program, and chooses to continue to work with only one, ending services with the other.
- An individual may make the decision that either program may not support or provide funding for services or accommodations identified.

## Employment Planning and Consultation Not Currently Co-Enrolled

Employment planning and consultation includes providing technical assistance between the W-2 program and DVR. For individuals with disabilities who are not currently co-enrolled, the agency representatives from W-2 and DVR may consult for the purposes of improving employment outcomes. Employment planning and consultation may also be provided for a W-2 participant who has been found eligible for DVR services but is currently on the waitlist.

DVR may act as consultant to the W-2 agency to:

- Provide information and training on the DVR program, including referral and application procedures, eligibility requirements, scope of services, policies, and processes.
- Assist the W-2 agency in identifying disability-related resources available within a W-2 participant's community such as qualified assessing agencies, treatment providers, disability advocates, and other organizations whose mission includes serving individuals with disabilities.
- Provide technical assistance to the W-2 Financial and Employment Planner (FEP) in applying recommendations from a disability or vocational assessment in the development of the W-2 employability plan. This may include:
  - Recommending work and training activities that are appropriate for the W-2 EP to help move the participant toward employment in the local labor market.
  - Identifying specific disability accommodations and assistive technology to make work and training accessible to a W-2 participant.
- Determine if referral of a W-2 participant for DVR services is appropriate (See the [Referral and Eligibility](#) section of this document, Page 9.). In cases where the participant is unsure how participation in DVR would be beneficial or what impact receiving DVR services would have on other benefits they are receiving, it may be appropriate to schedule a meeting with the participant, the FEP, and a DVR representative to discuss how the two programs could coordinate to help the individual achieve their employment goal(s).

**Note:** *DVR is a voluntary program. If a W-2 participant is not receiving DVR services, DVR can explain the program and possible benefits of DVR services to help the individual make an informed choice about whether to participate in DVR.*

- Share general information regarding disability-related topics.
- Provide referral and technical assistance to W-2 participants who are on a DVR waitlist. Any technical assistance that can be provided while the individual is on the waitlist can be of benefit to the participant in achieving their EP goal.

## **W-2 may act as consultant to the DVR agency to:**

- Provide information and training on the W-2 program, including referral and application procedures, eligibility requirements, scope of services, policies, and process.
- Offer technical assistance to help identify resources available within the DVR consumer's community, such as financial assistance, supportive services for children and families, domestic violence support services, and AODA treatment.
- Determine if referral of a consumer to the W-2 program is appropriate (See the [Referral and Eligibility](#) section of this document, Page 9.).

## **Successful Agency Practices**

W-2 and DVR agencies who serve people in the same geographic region should establish and maintain communication. All regions are encouraged to have monthly or quarterly gatherings of W-2 and DVR case managers to network, share information, and provide updates about their respective programs. This could also include providing up-to-date contact lists to the other agency.

The following additional recommendations could be put into practice to coordinate services:

- Designate liaisons at the W-2 and DVR agencies to develop cross-program relationships and act as consultants when contacted by the other agency.
- Designate a first point of contact at the W-2 and DVR agencies who would direct questions or requests to the appropriate staff person. This point-of-contact should have working knowledge of the responsibilities that both the W-2 and DVR agencies have as part of this TAG.
- DVR and W-2 staff may schedule hours to be available in each other's office to serve as a resource and to meet with co-enrolled individuals. By having a joint presence, staff are also available to consult, answer questions related to their programs, and become familiar with staff from the other program.
- Hold joint staffings with co-enrolled individuals as a means of coordination (See the [Coordination of Employment Planning for Co-Enrolled DVR & W-2 Individuals](#) section of this document, Page 11.).
- Schedule trainings for each other's program staff.

## **Referral and Eligibility Information** **Not Currently Co-Enrolled**

The decision to make a referral to either the DVR program or the W-2 program should be determined by the DVR consumer or W-2 participant (and support team if appropriate).

The following are general guidelines to assist in the decision-making process. Staff from both the DVR and W-2 programs are encouraged to contact one another to consult when it is unclear if a referral would be appropriate.

A DVR consumer or W-2 participant may choose to make a self-referral to either program at any time.

**A referral by W-2 to DVR should be made if all the following criteria are met:**

- The W-2 participant has a disability
- The participant has perceived barriers to employment
- The participant is interested in gaining competitive and integrated employment
- The participant has been informed of potential DVR services and is interested in applying for services

If a W-2 participant is applying for SSI/SSDI benefits and is unsure about DVR's potential impact on their benefits, contact DVR staff to discuss. The participant has the primary responsibility, but the Financial and Employment Planner (FEP) should support the individual in a secondary role.

### **DVR Referral and Eligibility Process**

A referral for DVR services form can be requested by calling or visiting a local DVR office, or is available online at [https://dwd.wisconsin.gov/dvr/referral\\_request.htm](https://dwd.wisconsin.gov/dvr/referral_request.htm). For DVR program and eligibility information, please refer to [Appendix 2](#).

When a completed referral is received, the individual will be scheduled for either an interview or an orientation meeting within 30 days of the date of referral, unless the individual requests otherwise.

At this meeting, DVR will share information on the DVR program, including the roles and responsibilities of DVR and consumers, to assist the individual in making an informed choice about applying for services.

If, at this meeting, the individual is interested in applying for DVR services, the individual or their guardian, if appropriate, can complete and sign an application for services. If the individual is over the age of 18 and has a court-appointed guardian, documentation of guardianship is required before DVR can accept the application.

Information and documentation of an individual's disability is needed to determine eligibility. An eligibility determination must be made within 60 days of application unless an extension is requested and approved. For information on the DVR waitlist and eligibility criteria for the DVR program, refer to [Appendix 2](#).

Contact and location information for each DVR office can be found at <https://dwd.wisconsin.gov/dvr/locations/>.

**A referral by DVR to W-2 should be made if:**

- The DVR consumer is a custodial or non-custodial parent of a dependent child, and
- The family's income is at or below 115% of the Federal Poverty Level (FPL).

Other financial and non-financial eligibility criteria are part of the eligibility process.

**W-2 Eligibility Process**

An application for W-2 can be requested by calling or visiting a local W-2 agency or Job Center. Contact and location information for each agency can be found at <https://dcf.wisconsin.gov/w2/parents/locator>.

Information on what to bring when applying for benefits can be found at <https://dcf.wisconsin.gov/files/publications/pdf/2372.pdf>.

The FEP must determine W-2 eligibility using all financial and non-financial eligibility criteria no later than seven (7) working days after the first meeting with the applicant. In the case that an applicant needs additional time to gather verification, the agency may extend the eligibility process for up to 30 days from the date the agency receives the signed Application Registration form.

**Successful Practices**

For questions about whether someone should be referred, the W-2 participant, DVR consumer, W-2 FEP, or DVR staff can contact the other program to consult on the circumstances specific to the case.

DVR and W-2 staff may be contacted to obtain information related to the other program to share with the W-2 participant or DVR consumer. This information may be verbal, written, shared in a joint meeting, etc.

If DVR and W-2 staff schedule hours in the other program's office, staff can be available to provide employment planning consultation and answer questions related to eligibility and referral. Additionally, a DVR and W-2 staff contact list should be kept up to date.

Both DVR and W-2 staff should ensure that information being shared with the individual is provided in an appropriate format, that the individual is provided accommodations and assistance as needed, and that the individual understands the information shared.

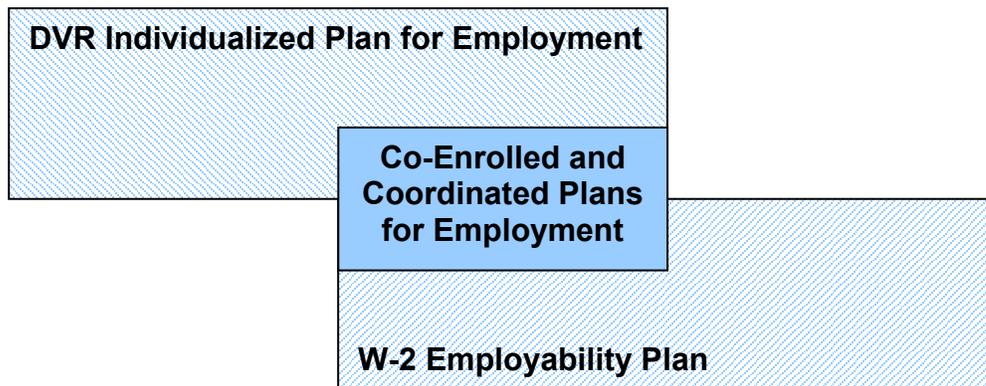
When a referral is being made, have the individual sign a release of information (ROI) to allow DVR and W-2 staff to follow-up with each other and share information related to and necessary for referral, eligibility, and coordination. This information could be shared in various formats - email, fax, phone call, etc. A signed ROI is required by each program.

See [Appendix 2](#) and [Appendix 3](#) for links to appropriate forms.

## Coordination of Employment Planning For Co-Enrolled DVR and W-2 Individuals

When an individual is co-enrolled in the W-2 and DVR programs, coordination between both programs and the individual is beneficial to all parties. Through coordination, both DVR and W-2 will:

- Increase successful employment outcomes for individuals with disabilities served;
- Maximize available resources and reduce duplication of efforts; and
- Increase program and resource knowledge of DVR Counselors and W-2 FEPs.



Coordination between DVR and W-2 can assist co-enrolled individuals in the following five areas:

### 1. Initial Communication

Both the W-2 and DVR agencies share in the responsibility for initiating contact when an individual is co-enrolled. As methods of communication between agencies are established at the local level, the process of initiating coordination will become easier. Critical steps include:

- Understanding the local service delivery system
- Obtaining necessary releases of information (See [Appendix 2](#) & [Appendix 3](#))
- Identifying key people who should be part of the coordination process, to include:
  - The co-enrolled individual and any authorized representatives
  - Primary staff from the DVR and W-2 programs
  - Case managers from any other program(s) who play a critical role in the individual's plan for employment
- Coming to agreement about which staff person (W-2 or DVR) will take the lead and facilitate coordination meetings
- Scheduling the first meeting in a location conducive to the planning process

If an individual is currently on a DVR waitlist, DVR may not provide services until the individual is activated from the waitlist. DVR, however, may provide consultation services during this time (see [Employment Planning Consultation](#), Page 7).

## **2. Coordination Meetings and Identification of Employment Goal(s)**

The purpose of coordination meetings is to facilitate communications to help a co-enrolled individual achieve his or her employment goal(s). The coordination meeting should be attended by the co-enrolled individual, his or her authorized representative, others as determined appropriate by the individual, and representatives from both programs.

- A discussion of the individual's involvement with each program, expectations, and identification of roles should occur.
- The co-enrolled individual's employment goal(s) should be developed based on his or her skills, abilities, interests and local labor market information.

In many cases, individuals who become co-enrolled will have already been through a process of assessment and employment planning with one or both agencies before coordination occurs between the two programs. Once the coordination process has begun, it is critical that the employment goals identified on the DVR IPE and the W-2 EP are aligned and coordinated, though they may not always have the same goal or timeframes.

- Federal and state law requires each program to develop a plan for employment. However, the two agencies may coordinate the two plans and the necessary supportive services to the benefit of the co-enrolled individual and both agencies.
- Federal law requires the DVR program to afford people with disabilities the opportunity to make informed choices. Informed choice means the DVR consumer must have the opportunity to understand their choices and the pros and cons of those choices. Informed choice does not require DVR to provide financial support for a specific choice. Informed choice means choosing among options, whether those options are supported by DVR or not.
- The W-2 and DVR agencies will not always share equal responsibility for all recorded goals (for example, W-2 may take primary responsibility for achieving the short-term employment goal, while DVR may take primary responsibility for achieving the longer-term employment goal).
- The co-enrolled individual must be able to leave the coordination meeting with a clear understanding of how the two programs are going to assist in meeting the individual's employment goal(s).

## **3. Identification of the Co-Enrolled Individual's Needs to Achieve the Goal(s)**

As determined appropriate, the co-enrolled individual, DVR, W-2, and other stakeholders (e.g., other case managers, family members, etc.) should discuss the individual's identified goal(s) and what he or she will need to achieve the goal(s).

- What barriers does the individual have that need to be addressed, both related and not related to disability?
- What resources and strategies are needed to assist the individual to reach their goal?
- What skills does the individual need to qualify for the job?
- What does the individual need to complete the essential functions of the job?  
Examples of services, supports and activities include:
  - Work experiences (short-term work training for assessment, skill development, etc.)
  - Job skills training
  - Adult Basic Education
  - English as a second language (ESL) classes
  - Job search/job readiness assistance
  - Work place accommodations
  - Vocational guidance and counseling
  - Rehabilitation technology (e.g., telecommunications, sensory and other technological aids and devices.)
- The individual should be as involved as possible in identifying their needs to get and keep a job matching their job goal.
- Identification of the agency responsible for providing the services and supports is not currently specified. However, program staff should know if their funds can pay for the identified services and supports.

#### **4. Coordination of Supports and Services**

- After the individual's goal and needs (services, supports, activities, etc.) related to achieving the goal are identified, all options to locate the supports and services needed to achieve the individual's employment goal(s) should be discussed.
- Both W-2 and DVR must contribute resources within the framework of their programs, policies, and procedures. The agencies must develop cost-sharing agreements on a case-by-case basis (see [Funding and Cost Sharing](#) section, Page 19).

#### **5. Agree on Follow Up Steps**

- Agree, in writing, which agency has responsibility for each part of the plan and incorporate this information into the EP and IPE.
- Schedule periodic meetings with DVR, W-2, and other stakeholders (e.g., other case managers, family members, etc.), as appropriate, to assess progress and adjust the plan as needed.
- Ensure clear understanding between agencies and the individual on next steps when an employment goal is achieved (follow-up services, case closure, etc.).
- Keep lines of communication open among key players.

## Coordination Scenarios

### Scenario One

Ellen has a back injury and requires a sedentary job. She completed the 9<sup>th</sup> grade and then dropped out during her sophomore year of high school. Previous work experience has included dishwashing in the kitchen at a local restaurant and farm work on her family's dairy farm. Ellen recently became eligible for W-2 and has already participated in a job readiness/motivation workshop through the W-2 agency. The workshop provided training on soft skills and resume development.

Ellen's goals identified on her W-2 Employability Plan are to:

- Complete her GED; and
- Obtain a full-time job as an office assistant

After consulting with a local Vocational Rehabilitation Counselor (VRC), Ellen's W-2 FEP referred her to DVR and helped her to apply for DVR services. Ellen was found eligible for DVR services. A meeting was held to discuss Ellen's background and disability, current activities assigned under W-2, and barriers to employment.

Through the coordination process, Ellen and the two agencies agree to work toward Ellen's education and employment goals.

### *Identification of Supports and Services*

Through the coordination planning process, Ellen, her W-2 FEP, and her VRC determine that for Ellen to achieve her goals, she will need the following W-2/DVR supports and services:

- Adult basic education courses to improve her math and reading proficiency so she can complete the GED requirements
- Basic computer skills training
- Work experience at a local business or charitable organization that will help Ellen practice general work place habits and soft skills in an office setting
- Assistance with transportation costs to participate in the various activities
- Rehabilitation technology assessment/devices (e.g., specialized work chair)
- Job search assistance

### *Coordination of Supports and Services*

The W-2 and DVR case managers agree on the cost-sharing strategy below.

**W-2** will:

- Cover costs of participation in adult basic education classes with a goal of improving Ellen's math and reading skills to the level needed to begin working on GED requirements within one year

- Connect Ellen with a work experience at a local business as an office assistant
- Pay for transportation costs for work experience

**DVR** will:

- Enroll Ellen in a four-week training course on basic computer skills
- Pay for a rehabilitation technology assessment and necessary devices
- Pay transportation costs for training and job search
- Assist with job search

## **Scenario Two**

William is a high school graduate with a very brief work history. He lives with his elderly parents and he is the single parent of a five-year old son. After graduating from high school, William began working at an automotive shop repairing cars. Shortly thereafter, he started having panic attacks that were so severe he stopped showing up for work and was eventually fired. William was later diagnosed with an anxiety disorder. It is difficult for him to be in public places, especially if he is required to interact with strangers. Activities such as grocery shopping, classroom participation, and community events are very difficult for him. William's parents have financially supported him and his son throughout his period of unemployment. With the aid of medication and counseling, William feels he is ready to start working again.

William first applies for DVR, knowing that his disability may qualify him for some employment services. At the initial appointment, the VRC explains to William that there is currently a waitlist for DVR services, and they discuss other resources that may be available in his community, including W-2. William is found eligible for DVR services and is placed on the waitlist. William decides to apply for W-2 and is found eligible.

As part of the informal assessment process required for W-2 applicants, the W-2 FEP contacts the VRC who meets with William and requests that the counselor act as a consultant on William's W-2 case to make recommendations for appropriate activities and workplace accommodations that may help William re-enter the workforce. William signs the necessary release of information forms to enable the W-2 FEP and the DVR counselor to speak directly about his case.

William's goals include:

- **Short-term:** Obtain a full-time job in the automotive industry that will allow him to financially support his family and build his confidence.
- **Long-term:** Complete an associate degree in automotive technology that will enable him to fulfill his career goal of managing an automotive service repair business.

The W-2 agency will work with William toward his goal of full-time employment in the automotive industry. As a consultant, the VRC can recommend strategies for the W-2 agency to use to help William with his employment search and accommodations that could help William adjust to a work situation.

When William is activated from the DVR waitlist, DVR will help William further explore his goal of completing an associate degree and needed services to reach his employment goal.

# Program Service Provision

## DVR and W-2

### DVR Services

Wisconsin DVR can provide employment and training services to eligible consumers. The services provided will depend on the consumer's job goal and what he or she needs to reach that goal.

- Career guidance and counseling
- Job search and placement assistance
- Information and referral services
- Transition-to-work services for high school students with disabilities
- Supported employment services for persons with severe disabilities, includes time-limited, on-the-job supports
- Rehabilitation technology
- Vocational and other training
- Disability and employment assessment
- Transportation
- Occupational licenses, tools and other equipment
- Assistance in small-business plan development
- Interpreter services
- Rehabilitation teaching services
- Diagnosis and treatment
- Post-employment services
- Any other services needed to reach an appropriate job goal

### W-2 Services

The W-2 program provides employment preparation and retention services, case management and cash assistance to eligible families.

- Assessment
- Employability planning
- Community and partner referrals
- Adult Basic Education
- Job skills training
- Short-term technical college programs
- Work experience

- Job search
- Job development and Placement
- Job retention
- Supportive services

The program is available to low-income parents with minor children who meet eligibility requirements and who are willing to work to their ability. Each W-2 eligible participant meets with a Financial and Employment Planner (FEP), who helps the individual develop an Employability Plan.

W-2 has the following paid placements: Community Service Jobs (CSJ), W-2 Transition (W-2T), Caretaker of an Infant (CMC), and At-Risk Pregnancy (ARP).

W-2 also provides education and training opportunities in conjunction with work or work-related activities to facilitate an attachment to the workforce.

More information about W-2 and other family support services can be found at <https://dcf.wisconsin.gov/files/publications/pdf/11890.pdf> (Also, see [Appendix 3](#)).

## Funding and Cost Sharing

When an overlap of employment services for co-enrolled individuals occurs, a cost-sharing arrangement may be negotiated between DVR and the W-2 program. The following are general guidelines to help understand how decisions can be made.

**Test 1:** If the service will help the individual achieve an IPE goal, DVR is primarily responsible for the service.

**Test 2:** If the service will help the individual achieve an EP goal, W-2 is primarily responsible for the service.

**Test 3:** If the same goal and service appears on both the IPE and the EP, DVR and W-2 are responsible for negotiating a cost-sharing arrangement. Conflicts between W-2 and DVR are to be resolved using the conflict resolution process outlined in [Appendix 5](#).

### Examples of Cost Sharing

- All parties (i.e., DVR, W-2, and the individual) have agreed that the individual will need specialized job placement services to assist the individual in gaining employment. DVR agrees to provide the job development services and W-2 agrees to cover transportation costs associated with this service.
- An individual's EP and IPE list an employment goal of part-time employment in childcare. W-2 agrees to provide the short-term childcare training, and DVR agrees to fund a rehabilitation technology assessment to determine the individual's accommodation needs when working in this field.
- All parties have agreed that the individual's EP will have a short-term goal of employment as a CNA, and the IPE will have a long-term goal of employment as an RN. The individual must complete CNA training to become an RN, and will work as a CNA while going to school to become an RN. W-2 funds the CNA training and DVR funds the RN training.
- All parties have agreed that W-2 will assist the individual with obtaining employment in a job that meets the individual's current financial needs (does not necessarily tie into IPE goal) while DVR continues to assist the individual with training and future employment to meet their IPE goal.

### Successful practices

- If there are any questions or concerns at the meeting regarding which program should pay for services, both DVR and W-2 should schedule an additional meeting to finalize this decision. This will allow time to consult with respective agency supervisors. If the issue cannot be resolved, staff should work with their supervisors following the process outlined in the conflict resolution in [Appendix 5](#).
- Allow for creativity while still ensuring that all policy and purchasing procedures are followed for both programs.

## Frequently Asked Questions

### **Who is responsible for obtaining a release of information?**

Both DVR and W-2 staff are responsible for ensuring the confidentiality of the individuals in their programs. Each program should obtain signed releases of information, allowing them to release necessary information, as appropriate, that meet their standards and are required by their policies. The DVR consumer and W-2 participant should be informed of his or her rights related to confidentiality as well as the limits of it.

### **Should a W-2 participant be referred to DVR to determine if the participant has a disability?**

A referral to DVR should never be made solely for the purposes of determining if a W-2 participant has a disability. A referral should be made to DVR if the participant has a disability and is interested in competitive, integrated employment.

### **How will an individual's W-2 benefits be impacted by receiving services from DVR?**

When an individual is eligible for both W-2 and DVR, the goal of the two programs should be to work in coordination (see [Coordination of Employment Planning for Co-Enrolled DVR & W-2 Individuals](#) section, Page 12) to ensure that the individual's IPE and EP align as much as possible and are working toward the same outcomes. This will allow some types of services and supports provided through DVR to count toward W-2 participation.

If an individual who is co-enrolled in both programs refuses to allow coordination to occur between W-2 and DVR, it could be more difficult for the individual to fulfill program requirements, which could lead to reductions in the W-2 benefit.

### **What if an individual will not allow communication between DVR and W-2?**

If a co-enrolled individual will not allow communication between DVR and W-2, the W-2 FEP and DVR counselor should explain the benefits of coordination, as well as informed choice and the possible benefits and consequences of the choices being made (see [Enhancing Communication with Program Participants](#) section, Pages 5-6).

### **What are comparable benefits under the DVR program?**

Prior to providing any DVR services to a consumer, DVR staff must determine if comparable benefits or services exist under any program and whether those benefits or services are available to the consumer. If available, the comparable benefits and services shall be used in whole or in part to cover the cost of VR services. There are some services that are exempted from comparable benefits as well as provisions of when they would not be required. DVR can be contacted for further information.

### **Is there currently a waitlist for DVR services?**

When DVR does not have enough resources to serve everyone who is eligible for DVR services, new consumers may be placed on a waitlist. For information on the status of the waitlist, or to find out if a waitlist is currently in effect, contact your local DVR office.

### **If a co-enrolled individual is on the DVR waitlist, what can W-2 do in the meantime to assist the individual?**

W-2 staff should continue to work with the W-2 participant on his or her EP. DVR can be consulted as needed while the individual is on the waitlist (see [Employment Planning Consultation](#) section, Page 7).

### **What is the eligibility criteria for DVR services?**

See [Appendix 2](#).

### **How can I find out whom I should contact at DVR?**

Each W-2 agency is encouraged to develop and maintain a DVR contact list to share with W-2 staff in the geographic region.

### **How can I find out whom I should contact at W-2?**

Each region is encouraged to develop and maintain a W-2 contact list to share with the DVR staff in their region.

### **What if an individual is not released to work by his or her medical provider(s)?**

If an individual is not released to work by his or her medical provider(s), DVR may still be able to assist the individual in moving toward employment. In Wisconsin, DVR assumes that all individuals with disabilities can benefit from services. By working closely with the medical provider and individual, trial work experiences and other employment services can be provided to assist the individual in attempting to work. In some cases, a consumer can work with accommodations in the right employment setting. If a consumer is interested in gaining employment, but unsure if they will be able to work due to their disability and limitations, DVR can be contacted to discuss the specifics of the case and possible benefits from services.

### **Should the EP and IPE goals match?**

There are times when the EP and IPE have the same goal. Sometimes, the EP goal will be a short-term goal to assist the individual with immediate employment, and the IPE goal will be the longer-term goal. It depends on the needs of the individual and what is determined through the coordination process.

**Who is responsible for paying for services?**

See the [Funding and Cost Sharing](#) section on Page 19.

**What services can W-2 and DVR provide?**

See the [Service Provision](#) section on Page 18.

**What do each agency's employment plans look like?***DVR's Individualized Plan for Employment (IPE)*

The DVR IPE can be found at:

[https://dwd.wisconsin.gov/dwd/forms/dvr/doc/dvr\\_12726\\_e.doc](https://dwd.wisconsin.gov/dwd/forms/dvr/doc/dvr_12726_e.doc)

*W-2's Employability Plan (EP)*

The W-2 EP can be found at:

<https://dcf.wisconsin.gov/files/forms/pdf/10788.pdf>

# Appendix I: Glossary

## ACRONYMS

**DVR:** Division of Vocational Rehabilitation

**EP:** Employability Plan (W-2)

**EPC:** Employment Planning and Consultation

**FEP:** Financial and Employment Planner (W-2)

**IPE:** Individualized Plan for Employment (DVR)

**ROI:** Release of Information

**TAG:** Technical Assistance Guide

**TANF:** Temporary Assistance for Needy Families

**W-2:** Wisconsin Works

## DEFINITIONS

**Assistive Technology Device:** Any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of an individual with a disability.

**Job Development / Job Placement:** Can include job seeking skills, job search and placement assistance, job retention services, follow-up services and follow-along services. Services are determined based upon a person's individual needs.

**Employment Outcome:** Entering or retaining full-time or, if appropriate, part-time competitive employment in the integrated labor market, supported employment, or any other type of employment in an integrated setting, including self-employment, telecommuting, or business ownership, that is consistent with an individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

**Informed Choice:** DVR consumers are provided with opportunities to participate actively and make meaningful decisions throughout the process including: evaluation and assessment services and providers, their employment goals and responsibilities, the services needed to complete their plans for employment, and the service providers and methods used to procure such services. Consumers may choose to involve family members, advocates and other authorized representatives throughout the process.

**Rehabilitation Technology:** The systematic application of technologies, engineering methodologies, or scientific principles to meet the needs of, and address the barriers confronted by, individuals with disabilities, including education, rehabilitation, employment, transportation, independent living, and recreation. The term includes rehabilitation engineering, assistive technology devices, and assistive technology services.

**W-2 Placement:** A W-2 participant may be placed in one of the W-2 placement types, identified below by a placement code (in parentheses):

- Case Management Follow-up (CMF)
- Case Management Underemployed (CMU)
- Case Management for Participants who were Denied or Declined an Extension (CMD)
- Case Management for Job Ready Individuals (CMJ)
- Community Service Job (CSJ)
- W-2 Transition (W-2T)
- Custodial Parent of an Infant (CMC)
- At Risk Pregnancy (ARP)
- Case Management Pregnant Women (CMP)
- Case Management Non-Custodial Parent (CMN)
- Case Management Minor Parent (CMM)
- Trial Employment Match Program (TEMP) jobs for custodial parents (TMP)
- TEMP jobs for non-custodial parents (TNP)
- Case Management Follow-Up for Participants who meet work participation rate requirements (CMF+)

## Appendix II: Wisconsin DVR Overview

This appendix includes information specific to the Division of Vocational Rehabilitation (DVR). It provides information on eligibility, how the waitlist (Order of Selection) works, and what services DVR can provide.

### A. Eligibility/Order of Selection for DVR

**Two separate determinations must be made before an individual with a disability receives DVR services:**

- Eligibility determination
- Placement on the Order of Selection waitlist

**To be eligible for DVR, an individual must:**

- Have a physical or mental impairment that results in a substantial impediment to employment; and
- Require VR services to prepare for, secure, retain, or regain employment determined by a Vocational Rehabilitation Counselor (VRC) employed by DVR.

**A person who is receiving Social Security Disability Income (SSDI) or Supplemental Security Income (SSI) and wants to work is presumed eligible for DVR services.**

DVR uses a waitlist, called Order of Selection (OOS), when DVR does not have enough resources to serve everyone. The DVR waitlist has three categories:

- Category 1: Most significant disabilities
- Category 2: Significant disabilities
- Category 3: All other eligible individuals

DVR serves people with the Most Significant Disabilities (category 1) first, followed by those with significant disabilities.

An individual's waitlist category is based on his or her functional limitations – how the disability affects his or her ability to function in certain areas.

DVR looks at seven areas to determine an individual's waitlist category:

- Mobility
- Communication
- Self-care
- Self-direction
- Interpersonal skills
- Work tolerance
- Work skills

DVR will activate individuals off the waitlist based on the waitlist category and the date the individual applied for DVR services. If an individual receives Social Security Disability benefits (SSI and/or SSDI), the individual is automatically placed in at least Category 2, with a possibility of moving to Category 1 depending on additional information.

## **B. Role of a VRC and Services DVR Can Provide**

The role of the VRC is to provide vocational planning and support. Responsibilities of the VRC can include any or all the following services:

### *Outreach*

DVR program information sharing, including its policies and process, to W-2 staff, participants, and other interested team members or community members. DVR provides outreach that will minimally include:

- Purpose of the Vocational Rehabilitation Program
- Eligibility requirements
- Application procedures
- Scope of services available to eligible individuals

### *Employment Planning Consultation (EPC)*

EPC provides W-2 participants who have not yet applied for vocational rehabilitation services with assistance, strategies, and creative ideas for identifying their employment goal, needs for services, and concerns to be addressed in achieving those goals. Topics may include information on assessments, assistive technology, accommodations, community resources, labor market, and employment. DVR does not bear any financial or ongoing counseling responsibilities under this definition unless the W-2 participant has an active IPE with DVR.

### *Information/Referral*

To community programs and services that may assist people with disabilities to reach employment and independent living goals.

### *Rehabilitation Counseling and Planning*

Occurs when an individual is eligible for DVR and is no longer on the waitlist. Rehabilitation counseling will include assistance in the development of employment goals that are appropriate given a consumer's needs, priorities, strengths, preferences, abilities, capabilities, and interests and will be present throughout the entire VR process.

### *Service Provision*

Services provided by DVR are individualized according to an approved IPE. All services provided by DVR will be directly related to establishing and achieving a job goal (see the [Service Provision](#) section on Page 17).

## C. DVR Authorization for Release of Confidential Information Form

A copy of the DVR Authorization for Release of Confidential Information form can be found at [https://dwd.wisconsin.gov/dwd/forms/dvr/doc/dvr\\_199\\_e.doc](https://dwd.wisconsin.gov/dwd/forms/dvr/doc/dvr_199_e.doc).

## D. DVR Process Chart



## Appendix III: Wisconsin Works (W-2) Overview

W-2 is based on work participation and personal responsibility. The program provides employment preparation and retention services, case management, and cash assistance to eligible families.

Under W-2, there is no entitlement to assistance. The program is available to low-income parents with minor children who meet eligibility requirements and who are willing to work to their ability. Each eligible individual meets with a Financial and Employment Planner (FEP), who helps the individual develop an Employability Plan (EP).

W-2 has the following paid placements:

- **Community Service Jobs (CSJ):** CSJ placements are developed for individuals who lack the basic skills and work habits needed in a regular job environment. CSJ positions offer real work training opportunities, but with the added supervision and support needed to help the participant succeed. CSJ participants receive a monthly grant of \$653. Individuals who are employed part-time, but have personal barriers that prevent them from increasing their work hours, may be placed in a part-time CSJ position with prorated benefits. In addition to a cash grant, CSJ participants may be eligible for FoodShare, Medicaid, child care assistance, and Job Access Loans.
- **W-2 Transition (W-2T):** W-2T is reserved for individuals who, because of employment barriers, are unable to perform independent, self-sustaining work. An in-depth formal assessment determines the appropriate level of W-2 participation, the person's ability to engage in specific work and training activities and the need for supportive services and accommodations. Based on the results of the assessment, the participant may be assigned up to 40 hours per week in activities that may include work experience, education and training, and other treatment and counseling activities as needed. Individuals who have permanent employment barriers are assisted in securing federal Supplemental Security Insurance benefits. W-2T participants receive a monthly grant of \$608. In addition to a cash grant, W-2T participants may be eligible for FoodShare, Medicaid, child care assistance, and Job Access Loans.
- **Caretaker of an Infant (CMC):** CMC placements are for custodial parents of infants who are 8 weeks old or less. CMC participants receive a monthly payment of \$673 and are not be required to participate in an employment position unless they volunteer to participate. In addition to a cash grant, CMC participants may be eligible for FoodShare, Medicaid, child care assistance, and Job Access Loans.
- **At Risk Pregnancy (ARP):** ARP placements are available to unmarried women in the third trimester of pregnancy who have a medically verified at risk pregnancy. ARP participants receive a monthly payment of \$673. In addition to a cash grant, ARP participants may be eligible for FoodShare and Medicaid.

Noncustodial parents, minor parents, and pregnant women may be eligible for an array of case management services in an unpaid placement. Custodial parents who are employed when they apply or become employed after participating in W-2 may be eligible for case management services. The final group eligible for case management services is W-2 participants who reach their time limit but ask for case management services.

### *Time Limits*

W-2 participants are currently limited to a maximum lifetime limit of 60 months. Participation in a CSJ or W-2T placement is also limited to 24 cumulative months. Each placement has its own 24-month time limit and, therefore, a participant has 24 months in each of the placement types. Extensions may be available on a limited basis when barriers exist that prevent employment.

### *Employment Supports*

W-2 employment supports consist of the related support services and features designed to facilitate access to and sustain employment.

- Community Steering Committees organize community leaders to coordinate resources leading to self-sufficiency.
- Local [Child Support](#) agencies work with W-2 custodial parents to help them get child support payments. Child support (CS) income does not cause the W-2 payment to go down and in most cases custodial parents get to keep 75% of their child support payment while on W-2.
- [Wisconsin Shares Child Care](#) is available to most low-income working families. Families pay a co-payment based on their income.
- [Job Access Loans \(JALs\)](#) are short-term, interest free loans that are intended to meet immediate and discrete financial crises for expenses related to obtaining or maintaining employment.
- [Transportation assistance](#) ensures that parents can get their children to child care and themselves to work.
- [Health insurance is available through Medicaid/BadgerCare](#)
- The Workforce Innovation and Opportunity Act (WIOA) offers employment placement and retention services, job training, and education-related training services. Services are available to both adults and youth and are delivered through the Job Centers.
- Low-income families with a child may receive [Emergency Assistance \(EA\)](#) to help keep their home, or in some cases, to help with the cost of a new residence. Families must have a current emergency of impending homelessness, homelessness, energy crisis, fire, flood, or natural disaster. Families must not have received an EA payment in the past 12 months. Families must apply for other payment options. Families also must meet other requirements. Families may apply for EA at their local W-2 agency.

### *Requesting Confidential Information*

When requesting confidential information, the W-2 FEP must use the Authorization for Disclosure of Confidential Information form, which can be found at <https://dcf.wisconsin.gov/files/forms/pdf/10779.pdf>.

### *More information*

about W-2 and other family support services can be found at <https://dcf.wisconsin.gov/files/publications/pdf/11890.pdf> (Also, see [Appendix 3](#)).

## Appendix IV: Comparison Chart

DVR and W-2 Staff can consult with each other at any stage of the process to ask about assessments, job or activity accommodations, individual barriers, and/or community resources. Consultation using an appropriate release of information can be done without opening a case with either agency. The purpose of consultation is to share information or experiences that may result in solutions for the individual.



<b>Eligibility/Waitlist</b>	<b>Develop the Plan</b>	<b>Ongoing Assessment of the Plan</b>	<b>Getting the Job</b>	<b>Keeping the Job</b>
<p>Eligibility for W-2 services is based on the participant meeting financial and non-financial requirements.</p> <p>Eligibility for DVR services is based on barriers to employment caused by disability.</p> <p>DVR may have a waitlist for services. Category placement and application date determines the order of selecting names from the waitlist. (Order of Selection)</p>	<p>An individual eligible/active in either program begins by working with staff to gather information through an assessment process to develop the Employment Plan/Individualized Plan for Employment including:</p> <ul style="list-style-type: none"> <li>▪ Identify job goals</li> <li>▪ Identify job barriers</li> <li>▪ Look at the labor market</li> <li>▪ Look at work history</li> <li>▪ Identify services to address barriers</li> <li>▪ Identify supports to address barriers</li> <li>▪ Identify a plan of action to find the job</li> </ul>	<p>If a person is active in both programs, the job goal, services, and progress measures should be complimentary, if not the same. One program cannot limit or expand the services of the other program.</p> <p>As service needs are identified, assess and address those needs.</p> <p>Examples of service needs include:</p> <ul style="list-style-type: none"> <li>▪ Money management</li> <li>▪ AODA issues</li> <li>▪ Domestic violence</li> <li>▪ Lifting restrictions</li> <li>▪ Mental health issues</li> </ul>	<p>Examples of W-2 job readiness activities include:</p> <ul style="list-style-type: none"> <li>▪ Application and resume assistance</li> <li>▪ Job Skills Training</li> <li>▪ Work Experience</li> <li>▪ On-site mentoring</li> <li>▪ Educational activities</li> </ul> <p>Examples of DVR job readiness tools may include:</p> <ul style="list-style-type: none"> <li>▪ Internship/Temporary Work</li> <li>▪ Application and resume assistance</li> <li>▪ Job Skills Training</li> <li>▪ On the Job Training</li> <li>▪ Apprenticeships</li> <li>▪ Job coaching</li> <li>▪ On site mentoring</li> </ul> <p>For additional information, refer to the <a href="#">Service Provision</a> section, Page 17.</p>	<p>W-2 follow up on job retention is a minimum of 1 year.</p> <p>DVR follow up on job retention is 90 days (minimum) and can be extended when appropriate.</p> <p>Common retention issues include:</p> <ul style="list-style-type: none"> <li>▪ Money management</li> <li>▪ Medication management</li> <li>▪ Medical management</li> <li>▪ Relationship management</li> <li>▪ Child care issues</li> <li>▪ Transportation issues</li> </ul>

## **Appendix V: Conflict Resolution**

### **A. General Procedures for Intra- and Inter-Agency Disputes**

For the resolution of disputes arising over issues addressed in this agreement, all parties will utilize the steps and methods as described herein. Attempts will be made to resolve the issue at the lowest level of disagreement. Informal resolution will be the first step in dealing with any disagreements relative to this agreement.

Examples beginning with field staff:

- DVR Counselors and W-2 FEPs
- DVR and W-2 Agency Supervisors/Managers
- DVR and W-2 Agency Directors
- DVR and W-2 Bureau Directors
- DVR and DFES Deputy Administrators
- DVR and DFES Administrators

When an issue cannot be resolved at the lowest level, it should be referred to the next level as a formal dispute. Formal disputes under these procedures are to be submitted in writing at the appropriate local or state level.

The materials presented will include:

- The regulation or requirement related to the dispute;
- The specific issue needing resolution; and
- The prior steps taken to resolve the issue and any additional information that may be relevant to the dispute.

Utilizing the information presented, a good faith effort will be made to reach a mutually satisfactory solution. Efforts must be made at each level for resolution in a timely manner.

### **B. Conflict Resolution between Participant/Consumer and W-2 or DVR**

W-2 participants/DVR consumers or their legal guardians have the right to appeal W-2 or DVR decisions regarding eligibility, services, and other aspects of the IPE or EP. In these situations, an appeal should be filed following program appeal procedures.

### **C. Resolution of State Department Intra-Agency Disputes**

This agreement recognizes that each agency has its own administrative mechanisms for the timely resolution of internal disputes. This agreement recognizes these procedures and permits each agency to resolve its own internal disputes.

## **D. Resolution of State Department Inter-Agency Terms of Agreement Disputes**

When a formal dispute arises between agencies regarding the terms of this agreement, the party seeking clarification shall use the following procedure for resolution:

1. Refer to the respective division administrator or their designees for resolution.
2. If unresolved by division administrators, refer to the highest level within the agencies for resolution.

All necessary steps in the resolution under this section shall occur within 60 days from referral to division administrators. If acted on in good faith with just cause and through mutual consent, an extension may be granted.