STATE OF WISCONSIN

DWD

Department of Workforce Development

Vocational Rehabilitation

DVR Statewide Services: Work Incentive Benefits Services

SERVICE PROVIDER TRAINING

2026 RELEASE

Training Objectives

- Understand the purpose and key elements of Work Incentive Benefits Services.
- Understand how the services work together.
- Recognize how these services support consumer outcomes.
- Understand DVR expectations for service delivery and reporting.

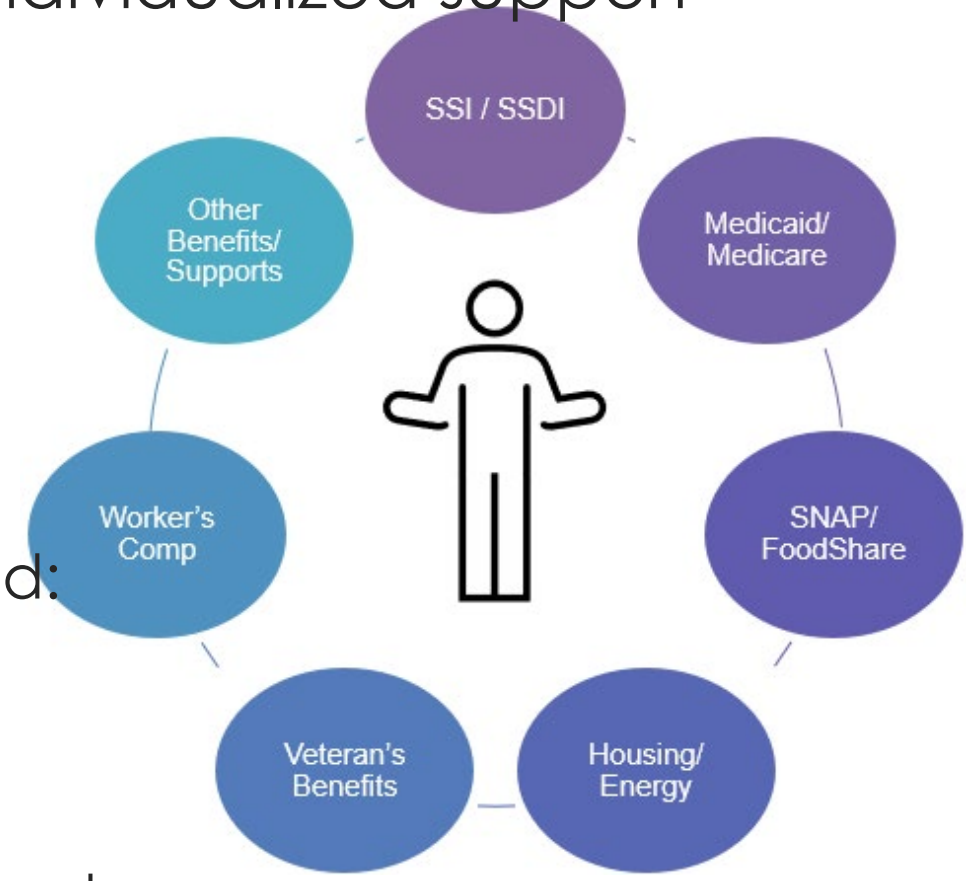
Where These Services Fit in DVR Services

- Work Incentive Benefits Services (WIBS) support consumers who are navigating public benefits while pursuing employment goals.
- These services are often used:
  - Early in DVR engagement
  - When employment begins or changes
  - When benefits questions arise during planning or work
  - Throughout employment to support ongoing stability
- WIBS helps connect benefits planning with employment decision-making.

Service Overview– Work Incentive Benefits Services

Work Incentive Benefits Services provide individualized support to consumers receiving:

- Social Security benefits (SSI/SSDI)
- Medicaid or BadgerCare
- FoodShare
- Housing assistance
- Other public or entitlement programs



Services focus on helping consumers understand:

- How work affects benefits
- Available work incentives
- Financial implications of employment
- Steps needed to maintain eligibility and supports

How the Services Work Together

WIBS is a progressive service model that builds from basic information to ongoing support.

1. Introductory Meeting – intake and general education
2. Portfolio – snapshot of current benefits
3. Analysis with Plan – forecasting and planning
4. Plan Assistance – ongoing implementation support

Each step builds a clearer understanding of benefits and work impact over time.

The Goal of These Services

- The goal is to help the consumer:
  - Understand how work impacts their public benefits.
  - Make informed decisions about employment and income.
  - Maintain access to essential supports while working.
  - Increase confidence in pursuing employment goals.
- WIBS supports the path toward financial stability and self-sufficiency through informed planning.

Summary of Services

Service	Purpose	Timeframes	Deliverables	Payment
Work Incentive Benefits Introductory Meeting	Establish shared understanding between consumer, provider and DVR for future benefits consultation activities	45 days to complete the service	• Intake Interview with consumer; DVR staff attendance optional • Signed releases for benefit verification • General benefits information to consumer	$200
Work Incentive Benefits Portfolio	Provide a point-in-time summary of the consumer's current benefits situation	60 days to complete the service	• Benefits Portfolio summary document (including all elements of reporting requirements) • Meeting to review Portfolio between Provider, consumer, and DVR staff (in-person, phone, or virtual)	$300
Work Incentive Benefits Analysis with Plan	Assist the consumer in executing a plan to access work incentives	45 days to complete the service	• Work Incentive Benefits Analysis with Plan (including all elements of reporting requirements) • Review meeting with consumer and DVR staff	$400
Work Incentive Benefits Plan Assistance	Support the consumer in executing the Work Incentive Plan	45 days - 12 months from date of authorization	• Work Incentive Benefits Plan Assistance Report • Documented contacts with consumer and DVR	$300

Introductory Meeting - Overview

- The WIB Introductory Meeting establishes the foundation for services.
- Purpose:
  - Gather initial benefits and household income information.
  - Confirm goals related to employment and financial stability.
  - Obtain signed releases for benefit verification.
  - Provide general information about work incentives.
- This meeting ensures shared understanding between DVR, provider, and consumer.

Introductory Meeting – Key Components

- The meeting includes:
  - Intake of current benefits and household income.
  - Discussion of goals, including employment, income, housing, etc.
  - Review of general work incentives (SSI, SSDI, Medicaid, etc.).
  - Identification of key support contacts (guardian, rep payee, LTC, etc.).
  - Documentation of communication preferences.
  - Signed releases for benefit verification.
- Verify information from public entities about the consumer's current benefits.
- This step sets the foundation for all future WIBS services.

Benefits Portfolio - Overview

- The Benefits Portfolio provides a verified snapshot of current benefits. It includes confirmation of:
  - SSA disability benefits and work incentives.
  - Health insurance programs (Medicaid, Medicare, etc.).
  - Housing, energy, and food assistance programs.
  - Veteran's benefits, if applicable.
  - Other income and entitlement programs .
- This creates a clear "point-in-time" picture of the consumer's benefits.

Benefits Portfolio – Key Components

- Portfolio development includes:
  - Verification of benefits from relevant agencies.
  - Documentation of coverage types, eligibility.
  - Review of dependent or household benefits.
  - Identification of potential work-related benefit impacts.
- A review meeting is required with:
  - Consumer
  - Provider
  - DVR staff
- This ensures shared understanding of current benefit status.

Analysis with Plan - Overview

- The Work Incentive Benefits Analysis with Plan helps consumers understand:
  - How employment will impact benefits over time
  - What actions are needed to maintain eligibility
  - When key benefit changes may occur
- It connects current benefits with future employment scenarios.

Analysis with Plan – Key Components

- The Analysis with Plan includes:
  - Timeline of expected benefit changes (TWP, SEIE, etc.).
  - Summary of benefits specialist's analysis of impact of wages.
  - Thresholds for benefits continuation or change.
  - Identification of work incentives (PASS, IRWE, ABLE, etc.).
  - Wage reporting responsibilities.
  - Plan for future consultations.
- A review meeting with DVR is required.

Plan Assistance - Overview

- Plan Assistance provides ongoing support after the analysis is completed.
- It supports consumers in:
  - Understanding and managing benefit changes as they occur
  - Responding to wage or employment changes
  - Maintaining eligibility for benefits and supports
  - Accessing work incentives as needed
- This is the **implementation phase** of WIBS.

Plan Assistance – Key Components

- Plan Assistance may include:
  - Follow-up meetings with the consumer.
  - Support with SSA reporting and documentation.
  - Assistance with benefits recalculations.
  - Guidance on work incentives.
  - Updates to the Benefits Plan as circumstances change.
- Providers must document ongoing contacts and updates.

Case Example

- Maria is a DVR consumer receiving SSDI and Medicaid. She recently accepted a part-time job and is thinking about increasing her hours but is concerned how this could impact her benefits and long-term financial stability.
- DVR authorizes WIBS services to:
  - Clarify Maria's current benefits.
  - Explain applicable work incentive options.
  - Analyze how different earnings levels may impact benefits.
  - Support Maria in making informed decisions about work and income changes.

Case Example

- Introductory Meeting:
  - Identifies SSDI, Medicaid, and SNAP benefits
  - Gathers baseline information and confirms consent to verify benefits
- Portfolio:
  - Confirms current benefit status and eligibility
  - Provides a clear "snapshot" of Maria's current situation
- Analysis with Plan:
  - Forecasts how different earnings levels may impact SSDI, Medicaid, and SNAP
  - Outlines expected timelines (TWP, EPE, reporting periods)
  - Identifies options if Maria increases hours, remains part-time, or transitions off benefits
  - Provides scenario-based planning to support informed decision-making

Case Example

- Plan Assistance:
  - Supports wage reporting and benefits updates as employment continues.
  - Helps Maria respond to changes in benefits status after increasing hours.
  - Provides ongoing guidance as income and work hours change.
- Outcome; Maria can:
  - Make an informed decision and increase her work hours with confidence in the financial impact.
  - Understand how different income levels may affect her benefits moving forward.
  - Maintain confidence and stability in her employment.

Key Principles

- Work Incentive Benefits Services are designed to:
  - Provide accurate, individualized benefits information.
  - Support informed employment decision-making.
  - Help consumers understand complex benefits systems.
  - Promote financial stability through work incentives.
- These services connect benefits planning with employment success.

Common Situations

- Sometimes providers may encounter challenges such as:
  - Consumer is overwhelmed by benefits complexity.
  - Benefits change during employment.
  - Immediate job offer occurs before full WIBS completion.
  - Consumer isn't working but needs help correcting existing benefits issues.
  - Consumer requires extraordinary assistance due to complexity of benefits situation and/or disability.

Service Documentation

- Each WIBS service has a required report:
  - Work Incentive Benefits Introductory Meeting Report (DVR-18046-E)
  - Work Incentive Benefits Portfolio Report (DVR-19461-E)
  - Work Incentive Benefits Analysis with Plan Report (DVR-18048-E)
  - Work Incentive Benefits Plan Assistance Report (DVR-18045-E)
- In general, reports must include:
  - Verified benefits information.
  - Summary of meetings and contacts.
  - Plan development and updates.
  - Documentation of consumer understanding and decisions.

Updates to Reports for 2026-2028

- No changes to WIBS Reports for 2026-2028 cycle.

Fee Schedule Notes

Service	2026 Rate
WIB Introductory Meeting	$200
Work Incentive Benefits Portfolio	$300
Work Incentive Benefits Analysis with Plan	$400
Work Incentive Benefits Plan Assistance	$300

See Fee Schedule for full payment criteria and requirements.

- Services must begin with 30 days of receiving the purchase order.
- Reports must be submitted within five (5) business days of service completion or the end of the reporting period.
- Payment is contingent on acceptable service delivery and documentation.

Important reminders:

- Providers may not seek or accept payments from another source for the same consumer and service funded in the same timeframe as DVR.
- First three (3) services are typically authorized together; combined timeframe should not exceed six (6) months.
- Plan Assistance may be authorized concurrently when needed.

Qualifications and Metrics

- WIBS providers must:
  - Complete formal Work Incentive Benefits Counseling training, such as Community Work Incentives Coordinator (CWIC) certification or equivalent comprehensive training.
- DVR will continue to collect metrics for continuous quality improvement efforts.
- Metrics include timeliness and provider qualifications.

Resources/Links

- SSA Ticket to Work site
- SSA How Ticket to Work Works
- Work Incentive Benefits Services crosswalk
- Work Incentive Seminar Event (WISE) On Demand
- VCU National Training & Data Center
- Employment Resources, Inc.
- Yang Tan Institute on Employment & Disability, Cornell University

Key Takeaways

- Work Incentive Benefits Services are designed to:
  - Help consumers understand how work affects benefits.
  - Provide clear, accurate, individualized benefits planning.
  - Support informed employment and financial decisions.
  - Assist consumers in maintain stability while working.

Additional Information

DVR Service Provider webpage:
https://dwd.wisconsin.gov/dvr/service-providers/

Contact us:
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