Department of Workforce Development
Division of Vocational Rehabilitation

State of Wisconsin

Work Incentive Benefits Analysis with Plan Report

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04 (1)(m), Wisconsin Statutes].

Report must be filled in completely prior to payment and submitted **within 5 days** of the end of service or previous month if service is continuing.

Report Month Select Month	Report Year (YYYY)
Consumer IRIS Number (9 Digits)	Service Provider Name (10-Character Abbreviation)
Consumer Name (As Listed on Purchase Order)	Service Authorization Date (MM/DD/YYYY)

Report Date	Report Author
Purchase Order (PO) Number	

Services must:

- Conducted directly with the consumer via phone, virtually or face-to-face meeting
- Be individualized to meet the needs of the consumer
- Be conducted via consumer's preferred method of communication
- Verify benefit information with the appropriate sources

Reporting must include:

- A written, organized, clear, concise, and readable style including definitions of all acronyms
- Current work and/or work goal information to the extent the work goal has been developed or this information is available at the time of the analysis
- Consumer demographic status relevant to benefits programs (living arrangements/housing, marital status, dependents, age, etc.),
- A written analysis of impact of (potential) wages on all public and private benefits, entitlements and economic assistance programs, with a description of each funding source, benefit amount, and the impact of wages/earnings on the benefit amount received by the consumer
- A description of available/applicable work incentives
- Ticket to Work eligibility (description of program, access and resource information, Employment Networks, Maximus website and other contact information)
- A thorough explanation of wage reporting requirements for Ticket to Work, if applicable, and all other entitlements and sources of economic assistance
- What is required for the DVR consumer to achieve economic self-sufficiency with employment
- Work incentives specifically available to the consumer, how the work incentive works, the benefit of using the work incentive, and how to access the work incentive. (Share handouts if applicable.)
- Specific task and who is responsible for completing the task if consumer is seeking to access a specific work incentive(s). Provided a target date for the task and list the actual date the tasks were completed.

- 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)
- Wage reporting explanation for their specific benefits. List when, who, and how they should report their wages.
- Action steps for the consumer to achieve their highest level of economic independence. Areas in these steps that should be covered include but are not limited to:
  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, education about applicable Impairment Related Work Expenses, Student Earned Income Exclusion etc.)

Please copy and paste your report below this line. The report must cover at a minimum all the reporting requirements listed above prior to payment.
