

EDUCATION AND WORKFORCE DEVELOPMENT CABINET

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SERVICE FEE MEMORANDUM

CP-TB-10-11-02

TO: Office of Vocational Rehabilitation (OVR) Staff, Branch Managers
Counselors, and Assistants, CDPVTC Director, Case
Management Director, and Counselors Office for the Blind (OFB)
Staff
Client Assistance Program (CAP)

FROM: Mindy Yates, Systems and Fiscal Management Branch
Benefits Analysis Team (Dave Matheis, Teresa Brandenburg, Donna
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Office of Vocational Rehabilitation

DATE: November 23, 2010
PREVIOUS UPDATES: June 1, 2012, October 15, 2012, August 6,
2013, February 10, 2014, August 20, 2015 P Selch,
January 1, 2016 P Selch, October 20th 2017, PCruse
January 1, 2018 PCruse

RE: Benefits Analysis

The purpose of this update is to encourage the use of Disability Benefits 101 (DB101), in-house Kentucky Work Incentive Counselors (KWICs) or the Work Incentive Planning and Assistance (WIPA) program before authorizing to pay for Benefits Analysis services.¹

BENEFITS COUNSELING SHOULD BE PROVIDED to all individuals who receive disability benefits from Social Security (SSI, SSDI, etc.). One option is to use **DB101**. This internet tool can help consumers understand the impact of work on their benefits. It can be found at ky.db101.org and used by anyone in conjunction with or in place of a formal Benefits Summary & Analysis (BS&A).²

¹ Clarifications from previous document.

² Updates from previous document.



Counselors can refer consumers who want or need more in-depth information for a formal BS&A. Prompt referrals are considered best practice, however referrals can be made at any point as needed. Before authorizing to pay for a BS&A, referrals to an in-house KWIC or a WIPA program should be considered.³

[Referrals to in-house KWIC](#) should include the Benefits Planning Query (BPQY), OVR-2 and a brief statement explaining the reason for the referral. Based on their availability, they may recommend a referral to a WIPA program or an outside vendor qualified to provide the Benefits Analysis service. The authorization for this service should follow the attached fee structure.

As of August 1, 2015, Social Security funded two [WIPA programs](#) to serve Kentucky for a three-year period. The Center for Accessible Living (CAL) serves roughly the western half of the state and Goodwill Industries of Kentucky (Lexington) serves the eastern half. There is no charge for this service, so no authorization is necessary. However, a release should be sent so that a report may be obtained. In addition, the consumer will need to provide a BPQY to them. The OVR counselor can assist the consumer to call Social Security at 1/800-772-1213 to make this request or the consumer can obtain a BPQY by going to their local Social Security office. Please note that consumers referred early in the vocational rehabilitation process who are only thinking about work may not receive a BS&A from the WIPA. In addition, the WIPA may not provide services in person.

[An outside vendor](#) must be certified as a Work Incentive Counselor (CWIC) or a Community Partner Work Incentive Counselor (CPWIC) through the Work Incentive Training Projects at Virginia Commonwealth University or certified through Cornell University's online Work Incentive program. Documentation that the certification is up-to-date must be provided and will be monitored by OVR.

Within sixty (60) days of receiving the referral for a BA, the CWIC/CPWIC must meet with the consumer and:

1. Gather pertinent information and obtain a BPQY and verification of other Federal and State benefits (e.g., Medicaid, Medicare, Food Stamps, attendant care or Medicaid waiver services).
2. Prepare a benefits analysis that, at a minimum, must include:
The consumer's name, contact and demographic information;
The consumer's goals for employment and earnings;
An overview of the Social Security work incentives that apply to the consumer;
The impact of employment on Social Security benefits, health care, and other State and Federal benefits received by the consumer Strategic Plan for Work Incentives Management and Support.
3. Depending on the complexity of the situation, the Counselor may request the CWIC/CPWIC meet or confer by telephone with the Counselor and the Consumer prior to the payment of the fee.

[Work Incentive Follow-up Support](#) can be for:

³ Changes from previous document.

- a. Assistance with developing, implementing & tracking a PASS plan.
- b. Assistance with reporting wages or training on how to report.
- c. Assistance with claiming work incentives, such as Impairment-Related Work Expenses, Subsidies, 1619b, etc.
- d. Assistance with any other issues related to Social Security that may affect the individual's pursuit of employment and/or ability to earn wages.

Fee Structure for Benefits Analysis by CWIC/CPWIC	FEE
Benefits Analysis Payable upon receipt of invoice and written BENEFITS ANALYSIS Report	\$450.00 <i>Exp. Code 10V BUN 6794</i>
Work Incentive Follow-up Support Services (for active cases) Payable upon receipt of invoice and written meeting	\$50.00/hour; 10 hours max <i>Exp. Code 90W BUN</i>

- OFB will use their Agency budgets.

Contact information for qualified vendors and the WIPA programs can be found on our website at:

<https://kcc.ky.gov/Vocational-Rehabilitation/programservices/Pages/Social-Security-and-Ticket-to-Work-Services.aspx>