




Title:	Work Incentives Services
Procedure #:	80-VR-11-15
Policy Reference:	80-VR-11
Legal Reference:	20 CFR 411, 34 CFR 361.41, 361.42, 361.45, 361.46, 361.48c, 361.52, 361.54, Title II and Title XVI of Social Security Act, Social Security Administration Ticket to Work and Work Incentives Improvement Act of 1999
Effective Date:	February 19, 2018
Approved:	Kevin L. Miller, Executive Director 
Origin:	Bureau of Vocational Rehabilitation and Bureau of Services for the Visually Impaired
Supersedes:	N/A
History:	N/A
Review/ Implementation	Begin Review – 08/19/19 Implement Revisions By – 02/19/20

I. PURPOSE

The purpose of this procedure is to provide direction for work incentives planning services in accordance with appropriate federal (e.g. Code of Federal Regulations [CFR]) and state law (i.e. Ohio Revised Code [ORC], Ohio Administrative Code [OAC]), Governor directives and executive orders, other governing agency (e.g. DAS, OBM) policy or guidance, and/or Executive Director expectations.

Refer to the AWARE Manual as there may be additional direction related to this procedure.

II. APPLICABILITY

This procedure applies to VR Staff and VR Contractors.

III. DEFINITIONS

Refer to “Vocational Rehabilitation Definitions” (80-VR-99.A).

IV. PROCEDURES

A. General

1. OOD shall provide information to individuals and if applicable, their parent or legal guardian throughout the Vocational Rehabilitation (VR) process as required by law (e.g. rights and duties, and the VR Overview). This information shall be provided, in writing, and when appropriate, in the individual's native language or through an appropriate mode of communication.

2. AWARE shall be updated with pertinent conversations, recommendations, justifications, approvals and/or other actions taken in relation to this procedure. If supervisory or management approval is required during the VR process, the supervisor or manager shall document their approval in AWARE. If written approval is received from a supervisor or manager it shall be added to AWARE.
3. If any OOD Staff are a Certified Rehabilitation Counselor (CRC-certified) and will be directly involved with an individual's case, he/she shall complete the "Professional Disclosure Statement" (80-VR-01.E).
 - a. VR Staff or VR Contractors who are not a Certified Rehabilitation Counselor (CRC) are exempt from this requirement.
 - b. Once completed, the "Professional Disclosure Statement" shall be reviewed and signed by the individual and, if applicable, his/her parent or legal guardian, and the CRC-certified VR Staff or VR Contractor.
 - i. Once signed, the statement shall be scanned into the AWARE Participant Module, as a Case Note, with the category "Professional Disclosure Statement" and summary title "Signed."
4. Transition Services" (80-VR-11-12) shall be followed for additional guidance and direction for students with a disability enrolled in a secondary educational institution who may need work incentives planning services.
5. VR Staff or VR Contractors shall provide general information concerning work incentives planning services to those individuals receiving federal, state, and local public benefits including Social Security disability benefits.
6. VR Staff or VR Contractors shall refer to the OOD "VR Provider Manual" for definitions, guidance and requirements for work incentives planning services (WIP) and work incentives coordination (WIC).
7. VR Staff or VR Contractors shall refer to "Information and Referral" (80-VR-11-07) for additional guidance and direction regarding providing referral information for work incentives planning services.

B. Provision of Work Incentives Planning Services

1. Application status

- a. VR Staff or VR Contractor shall provide OOD Fact Sheet(s) explaining Social Security and Medicaid's work incentives information to the individual and, if applicable, his/her parent or legal guardian, upon request or confirmation that the individual is a beneficiary of Social Security benefits (e.g. SSA Benefits Verification letter, electronic data sharing [match] performed in AWARE, individual report).
 - i. "What Are Work Incentives?" Fact Sheet (80-VR-11-15.A)

- a) VR Staff or VR Contractor shall provide this document to all individuals receiving Social Security benefits, both Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).
 - 1) VR Staff or VR Contractor shall document the provision of this fact sheet on the “Eligibility and OOS Letter” (80-VR-06-02.A).
- ii. Fact Sheets Pertaining to the Receipt of SSI
 - a) VR Staff or VR Contractor should also provide, when applicable, the following documents to individuals receiving SSI benefits:
 - 1) Blind Work Expense (80-VR-11-15.B);
 - 2) Medicaid Section 1619(b) (80-VR-11-15.C); and
 - 3) Student Earned Income Exclusion (SEIE) (80-VR-11-15.D) .
- iii. Fact Sheets Pertaining to the Receipt of SSDI
 - a) VR Staff or VR Contractor should also provide, when applicable, the following documents to individuals receiving SSDI benefits:
 - 1) Extended Period of Eligibility (EPE) (80-VR-11-15.E);
 - 2) Trial Work Period (TWP) (80-VR-11-15.F); and
 - 3) Subsidies and Special Conditions (80-VR-11-15.G).
- iv. Fact Sheets Pertaining to the Receipt of Both or Either SSI/SSDI
 - a) In addition to the above, VR Staff or VR Contractor should also provide, when applicable, the following documents to individuals receiving either SSI or SSDI:
 - 1) Expedited Reinstatement (EXR) (80-VR-11-15.H);
 - 2) Impairment Related Work Expense (IRWE) (80-VR-11-15.I);
 - 3) Plan to Achieve Self-Support (PASS) (80-VR-11-15.J);
 - 4) Section 301 (80-VR-11-15.K);
 - 5) Ticket to Work (TTW) (80-VR-11-15.L);
 - 6) Income Reporting (80-VR-11-15.M) ; and
 - 7) Medicaid Buy In for Workers with Disabilities (MBIWD) (80-VR-11-15.N).
 - b. In order to educate our individuals about work incentives and how employment would affect their receipt of benefits, VR Staff or VR Contractors should encourage and assist individuals (if needed) with utilizing the Disability Benefits 101 website, (www.db101.org) including but not limited to, the following tools:

- i. SSI and/or SSDI Income Snapshot;
 - ii. Benefits and Work Calculator;
 - iii. School and Work Calculator; and
 - iv. MBIWD Calculator.
- c. In order to educate our individuals about opportunities financial security and savings and investment solutions while receiving benefits, VR Staff or VR Contractors should encourage and assist individuals (if needed) with researching STABLE Accounts by visiting www.stableaccount.com and/or providing the individual with a STABLE Account brochure.
2. AWARE “Service” Status (IPE)
- a. Individuals Being Served Under OOD’s Employment First Partnership Agreement with the Ohio Department of Developmental Disabilities (DODD)
 - i. VR Staff shall be responsible for the tasks listed below.
 - a) In addition to providing the documents listed in Section B.1.a., when an individual is identified as an SSI/SSDI or Medicaid beneficiary and expresses a desire to obtain employment, VR Staff shall discuss with and recommend to the individual and if applicable, his/her parent or legal guardian, a referral to OOD work incentive services offered by an internal Work Incentives Caseload Assistant (CA). Individuals should also be made aware of other providers for this service in accordance with the requirements of Informed Choice.
 - b) If the individual and if applicable, his/her parent or legal guardian, selects work incentive planning services or work incentives coordination from a Work Incentives CA, VR Staff shall obtain the individual’s and if applicable, his/her parent or legal guardian’s signature on OOD’s “Consent to Obtain and Release Information” form (80-VR-01.G) for each relevant agency (e.g. Job and Family Services, Veterans Administration), as well as one (1) copy of the “Social Security Administration Consent for Release” (ssa-3288), and save in an AWARE Case Note using the category “Benefits Information,” with the summary title of “Work Incentives Forms.”
 - 1) VR Staff shall complete the OOD “Work Incentives Planning Services Referral Form” (80-VR-11-15.A) in AWARE and attach it to a Case Note using the title assigned by AWARE.
 - 2) VR Staff shall assign an “Activity Due” in AWARE titled “Work Incentives Planning Service” to their local assigned Work Incentives CA with a due date forty-five (45) business days from the entry.
 - ii. Work Incentives CAs shall be responsible for the tasks listed below.

- a) Throughout the provision of work incentives planning services to the individual, Work Incentives CAs shall follow all rules, guidelines, and expectations as set forth in their Community Work Incentives Coordinator (CWIC) and/or Work Incentive Practitioner (WIP) certification.
- b) Upon receiving the “Activity Due” in AWARE, the Work Incentives CA shall document the individual’s information on the “Work Incentives Planning Services Tracking Sheet” (80-VR-11-15.O).
 - 1) The Referral Date shall be the date the “Activity Due” was generated in AWARE.
 - 2) The Work Incentives CA shall continuously update the tracking sheet throughout the provision of work incentives planning services.
 - 3) Within five (5) business days of the “Activity Due” creation, the Work Incentives CA shall request verification of all public benefits the individual is receiving.
 - 3.1 Utilizing the signed “SSA Consent for Release of Information” forms, the Work Incentives CA shall request a Benefits Planning Query (BPQY) to verify receipt of common Social Security benefit programs which include, but may not be limited to :
 - 3.1.1 SSDI;
 - 3.1.2 SSI;
 - 3.1.3 State Supplement;
 - 3.1.4 Ticket to Work;
 - 3.1.5 Medicare;
 - 3.1.6 Medicaid;
 - 3.1.7 Trial Work Period; and
 - 3.1.8 Medicaid Home and Community Based Services (HCBS) waiver.
 - 3.2 Utilizing the OOD “Consent to Obtain and Release Information” forms, the Work Incentives CA shall request verification of all other benefits the individual is receiving which include but may not be limited to the ones listed below
 - 3.2.1 Department of Job and Family Services
 - 3.2.1.1 Food Assistance;
 - 3.2.1.2 Housing Assistance; and

- 3.2.1.3 Unemployment Insurance.
- 3.2.2 Ohio Bureau of Workers' Compensation
 - 3.2.2.1 Temporary Total Compensation.
- 3.2.3 U.S. Department of Veterans Affairs
 - 3.2.3.1 Veterans Pension;
 - 3.2.3.2 Disability Compensation;
 - 3.2.3.3 Dependency and Indemnity Compensation (DIC); and
 - 3.2.3.4 Special Monthly Compensation (SMC).
- 3.2.4 U.S. Department of Labor.
 - 3.2.4.1 Black Lung Benefits.
- 3.2.5 U.S. Railroad Retirement Board
 - 3.2.5.1 Retirement;
 - 3.2.5.2 Survivor;
 - 3.2.5.3 Disability;
 - 3.2.5.4 Unemployment;
 - 3.2.5.5 Sickness.

- c) When verifying benefits through a conversation with an agency representative (e.g. telephonically, electronically), the Work Incentives CA shall document the contents of the conversation in an AWARE Case Note.
- d) Upon receipt of all benefits verification documentation, the Work Incentives CA shall:
 - 1) review all information;
 - 2) address discrepancies and/or inconsistencies;
 - 3) identify any benefit issues that require immediate resolution; and
 - 4) identify relevant work incentives available to the individual.
- e) Within forty-five (45) business days of the original "Activity Due", the Work Incentives CA shall complete a report utilizing the recommended template from his/her certifying entity.
- f) Upon completion of the report, the Work Incentives CA shall complete the items below in AWARE.
 - 1) On the on the "Actual Service Layout" page:

- 1.1 the start date shall be the date the referral is received (i.e. date the “Activity Due” was created by VRC); and
 - 1.2 The end date shall be the date the report is completed.
 - 2) In the “Activity Due” in AWARE, the date the report was completed shall also serve as the date of completion for the “Activity Due”.
 - g) Within 15 business days of the completion of the report, the Work Incentives CA should work with the referring Vocational Rehabilitation Counselor (VRC) to schedule a telephonic or electronic (e.g. Skype, GoTo Meeting) with the individual and if applicable, his/her parent or legal guardian, and any other person(s) the individual identifies. It is preferred The VRC shall make every effort to attend this review meeting.
 - 1) Prior to the meeting, the Work Incentives CA shall provide the VRC, the individual and if applicable, his/her parent or legal guardian, and any other person(s) the individual identifies, with copies of:
 - 1.1 the report (e.g. email, U.S. mail);
 - 1.2 all verification documentation (e.g. BPQY); and
 - 1.3 an appointment letter.
 - 1.3.1 All of the above documents shall be saved as an AWARE Case Note using the category “Benefits Information,” with the summary title “Work Incentives Report”.
 - 2) If the individual and if applicable, his/her parent or legal guardian, and/or payee prefers a face to face report review, the Work Incentives CA and VRC should work together to schedule the meeting within thirty (30) days of report completion.
 - 2.1 An appointment letter shall be sent to all appropriate parties, and saved to in an AWARE Case Note.
 - 3) The Work Incentives CA shall save the report and all verification documentation in an AWARE Case Note using the category “Benefits Information,” with the summary title “Work Incentives Report.”
- b. Individuals NOT being served under OOD’s Employment First Partnership agreement with the DODD
 - i. VR Staff or VR Contractor shall be responsible for the items listed below.
 - a) In addition to providing the appropriate documents listed in Section B.1.a., when an individual is identified as an SSI/SSDI beneficiary, VR Staff or VR Contractor shall discuss with and recommend the provision of work incentive planning services or work incentives coordination offered by external agencies, including Work Incentive Planning and Assistance (WIPA) entities and Community Rehabilitation Providers (CRPs).

- b) Providers shall be selected by the individual, in collaboration with the VR Staff or VR Contractor, through informed choice.
- c) VR Staff or VR Contractor should provide the "Selection of Provider Informational Sheet" (80-VR-07-01.A) and shall document how the individual and if applicable, his/her parent or legal guardian, was provided informed choice (refer to "Informed Choice" [80-VR-07 and 80-VR-07-01]).
- d) VR Staff or VR Contractor shall complete the OOD "Work Incentives Planning Services Referral Form" (80-VR-11-15.P) and forward to the provider chosen by the individual.
 - 1) This form shall also be attached to an AWARE Case Note using the category of "Benefits Information", with the summary title of "Work Incentive Referral Form".
- e) VR Staff or VR Contractor should, where appropriate and possible, attend the review meeting with the provider, and shall ensure the individual and if applicable, his/her parent or legal guardian, receives a copy of report and all verification documentation (e.g. BPQY).

3. Employed Status

- a. VR Staff or VR Contractor should provide the OOD "Reporting Your Income Fact Sheet" to all individuals who receive SSI and/or SSDI benefits.
- b. If the individual and if applicable, his/her parent or legal guardian, prefers to report their income by calling, visiting, or writing to Social Security, VR Staff or VR Contractor should offer assistance to individuals in locating the address and phone number of their local Social Security office via the following link: (<https://secure.ssa.gov/ICON/main.jsp>).
- c. If the individual and if applicable, his/her parent or legal guardian, prefers to report their income electronically, VR Staff or VR Contractor should offer assistance to individuals in downloading the "SSI Mobile Wage Reporting" app and/or reporting online through the individuals "mySocialSecurity" web site via the following link: (<https://www.ssa.gov/myaccount/>).
- d. If the individual is eligible for Medicaid, VR Staff or VR Contractor should offer assistance to individuals in enrolling in Ohio's Medicaid Buy-In for Workers with Disabilities program (refer to OOD's "MBIWD Fact Sheet" for assistance).
- e. If the individual and if applicable, his/her parent or legal guardian, needs additional assistance with the above services, and/or additional services including applying for and documenting work incentives (e.g. benefit and salary estimation), VR Staff or VR Contractor should refer the individual for work incentives coordination services to an appropriate provider (OOD Work Incentives CA or external WIPA or CRP), following the above mentioned referral procedures.

C. Violation

An employee who violates this procedure may be subject to discipline up to and including removal.

FORMS AND ATTACHMENTS

- 80-VR-11-15.A What are Work Incentives? Fact Sheet
- 80-VR-11-15.B Blind Work Expense (BWE) Fact Sheet
- 80-VR-11-15.C Medicaid Section 1619 (b) Fact Sheet
- 80-VR-11-15.D Student Earned Income Exclusion (SEIE) Fact Sheet
- 80-VR-11-15.E Extended Period of Eligibility (EPE) Fact Sheet
- 80-VR-11-15.F Trial Work Period (TWP) Fact Sheet
- 80-VR-11-15.G Subsidies and Special Conditions Fact Sheet
- 80-VR-11-15.H Expedited Reinstatement (EXR) Fact Sheet
- 80-VR-11-15.I Impairment Related Work Expense (IRWE) Fact Sheet
- 80-VR-11-15.J Plan to Achieve Self-Support (PASS) Fact Sheet
- 80-VR-11-15.K Continued Payment Under Vocational Rehabilitation (Section 301) Fact Sheet
- 80-VR-11-15.L Ticket to Work (TTW) Fact Sheet
- 80-VR-11-15.M Reporting Your Income Fact Sheet
- 80-VR-11-15.N Medicaid Buy-in for Workers with Disabilities (MBIWD) Fact Sheet
- 80-VR-11-15.O Work Incentive Services Tracking Sheet
- 80-VR-11-15.P Work Incentive Services Referral Form

RESOURCES

- Form SSA-3288 “Social Security Administration Release of Information”
- “Vocational Rehabilitation Definitions” (80-VR-99.A)
- Social Security Administration
- “WIPA & Community Partner Work Incentives Counseling National Training Curriculum, 2017 Edition”

FUNDING

Programs provided by the Opportunities for Ohioans with Disabilities are funded, in whole or in part, with federal grants awarded by the U.S. Department of Education (DOE) or the U.S. Department of Health and Human Services (HHS).

For purposes of the Vocational Rehabilitation (VR) Program, including Pre-Employment Transition Services (Pre-ETS), OOD received 78.7% of its funding through the DOE VR grant. In Federal fiscal year (FFY) 2018, OOD received \$100,336,097 in federal funds. Funds appropriated by the State covered 21.3 % of the total costs, or \$27,155,767. Of these federal funds, \$15,050,415 is set aside for Pre-ETS.

For purposes of the Supported Employment Program, the DOE VR grant funded 100% of the costs for the Supported Employment for Youth with a Disability Program. In FFY 2018, OOD received \$303,725. The grant also funded 95% of the Supported Employment Program (non-Youth). In FFY 2018, OOD received \$303,725 and the State appropriated funds paid the remaining 5% or \$33,747 of the total costs.

REVIEW

It is the responsibility of the Deputy Director, or designee, to review this procedure, on or before, the date listed in the header and if applicable, make any necessary revisions. The Deputy Director, or designee,

shall document the review as required in “Policy and Procedure Development, Review, Dissemination and Acknowledgement” (10-ADM-01).