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SERVICE FEE MEMORANDUM

CP-TB-10-11-02

UPDATE

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
Gerry Gordon-Brown and Vanessa Denham, Client Assistance Program (CAP)

FROM: Mindy Yates, Systems and Fiscal Management Branch
Benefits Analysis Team (Dave Matheis, Teresa Barney, Donna Osburn, Kellie Scott, and Gloria Gibson)

DATE: November 23, 2010
UPDATE: June 1, 2012
UPDATE: October 15, 2012
UPDATE: August 6, 2013

RE: Benefits Analysis

The purpose of this update is to announce re-funding of the WIPA program.

The two Work Incentives Planning and Assistance (WIPA) programs at the Center for Accessible Living (CAL) and Independence Place were re-funded by the Social Security Administration on August 1, 2013. Funding will continue through July 31, 2014 with a further on-year extension possible. The Community Work Incentives Coordinators (CWICs) at both programs began taking referrals again on August 1, 2013. As of now, a referral can be made to the WIPA by an OVR counselor. There is no charge for this Benefits Analysis service. However, a release should be sent with the referral so that a report may be obtained. If a consumer is referred early in the vocational rehabilitation process and they are only thinking about work, they may not receive a BS&A and may not even be seen in person by the WIPA.

CAL and Independence Place were working on a number of authorizations for services prior to August 1, 2013. Payment can still be made for these services when the report is delivered. Authorizations for services should not be made to CAL and Independence Place after August 1, 2013 for a Benefits Analysis.

Referrals can also continue to be sent to CWIC's not associated with a WIPA Program. The authorization for this service should follow the attached fee structure. A Benefits Analysis (BA) referral can be made at any point in the rehabilitation process but is best suited to SSI-D, SSI-B and/or SSDI recipients who are in the early stages of the development of an Individual Plan for Employment.

When sending a referral for a Benefits Analysis (whether it is with a WIPA or another CWIC), the consumer must provide their BPQY to the CWIC. The OVR counselor can assist the consumer to call the Social Security office at 1/800-772-1213 to make this request. The consumer can also obtain a BPQY by going to their local SSA office. Such referrals would be appropriate when it is the consumer's choice to use a specific individual CWIC not employed by a WIPA, or when a report is not available from a WIPA, as previously described.

To be qualified to provide the Benefits Analysis service, the vendor must have successfully completed the training provided by the Kentucky or Indiana Benefits Information Network (**BIN**) to be a **BIN Liaison** OR certified as a **CWIC**. OVR will pay Provisionally Certified CWICs the same rate as CWICs for the first twelve months after the attainment of this provisional certification. If the individual has not attained full certification within twelve months s/he will be paid at the same rate as an individual who has successfully completed the Benefits Information Network (BIN) training and who is known as a BIN Liaison. On January 1, 2014, the KY-OVR will no longer pay for the BIN report from a BIN liaison. They will need to complete training and have at least a provisional certification as a CWIC at that time.

The counselor may choose whether to send the consumer to a BIN or a CWIC. However, under the following circumstances the consumer will best be served by a CWIC rather than a BIN.

A CWIC should be utilized when the consumer:

- Ø Is an SSDI recipient with prior work experience SSA is not aware of
- Ø Is a dual recipient (SSI-D & SSDI)
- Ø Is receiving other state or federal benefits that may be affected by employment
- Ø Is a recipient of Medicaid waiver services
- Ø Wants to be self-employed

Within sixty (60) days of receiving the referral for a BA, the **BIN** provider or **CWIC** must meet with the consumer and:

1. Gather pertinent information and obtain a Benefits Planning Query (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 BIN Liaison or the CWIC meet or confer by telephone with the Counselor and the Consumer prior to the payment of the fee.

Fee Structure:

Type of Benefits Analysis/Support	Report	Provider	Fee	Issues/Notes
1. Benefits Analysis -CWIC	Benefits Summary & Analysis	CWIC	\$600	
2. Benefits Analysis -BIN	Benefits Screening Profile & Strategic Plan for Work Incentives Management & Support	BIN Liaison	\$400	Must be reviewed by a CWIC through the fee in #3 below or through an existing contract with the Human Development Institute
3. Review of Benefits Analysis- BIN in #2	Must sign off on reports in #2	CWIC	\$100	To be authorized when not contracted through HDI
4. Work Incentive Follow-up Support		CWIC	\$50/hour (up to 10 hours)	Used for services needed beyond the Benefits Analysis, see description Below

*** Remember – If referred to a WIPA then there is no charge to the agency.

The proper Expenditure Code to use will be **10V**, Benefits Analysis. If follow up services are needed for a case in active status, the code will be **90W**, Work Incentive Follow- up Support. Funds for these services for OVR counselors will come from the **BUN 6794**. OFB counselors will use their counselor budgets.

Work Incentive Follow-up Support can be for:

- 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.