

## Financial Reimbursement for Employment Documentation Guidance (Revised: January of 2012)

Providing financial reimbursement is

- **Required for Social Security beneficiaries working at Substantial Gainful Activity (SGA) who are providing wage documentation.\***
- A case-by-case decision for non Social Security consumers who provide employment documentation.

\*A consumer can decline the financial reimbursement. The discussion and consumer's choice should be case noted.

The follow along services that we provide during the first 90 days of employment (at a minimum) are particularly critical for assisting consumers to successfully achieve and maintain their employment goals. It is important that we communicate regularly with our consumers to identify any additional services that they need to assure success on the job.

### **Financial reimbursement:**

One tool we can use to engage consumers is providing financial reimbursement to defray the costs of providing documentation during the follow-along period. This service should be included in the consumer's plan as "follow along".

Additionally, we should inform SSI/SSDI consumers that if they provide proper wage documentation, Social Security reimburses DVR for our costs. DVR can use these additional funds to assist other consumers who need DVR services.

### **Amount of the reimbursement:**

\$25.00 per month is a suggested amount.

**Note:** For most consumers, \$25.00/month will cover the costs of providing documentation for mailing, faxing, calling, etc

### **Providing reimbursement greater than \$25.00/month:**

Amounts greater than \$25.00/month can be provided to a consumer if it is necessary. The specific reasons for this additional amount must be documented in the consumer's file.

**See next page for  
Required Steps and Documentation When Providing This Service**

## Required Steps and Documentation When Providing This Service

- Include employment follow-along services and expectations in the IPE.
- Determine and document in the case record the specific information the consumer is to provide and frequency of contacts.
  - **For SSI/SSDI beneficiaries with earnings at SGA (\$1,010/month, \$1,690/month for individuals who are blind) 9 out 12 months of acceptable wage documentation is required for cost reimbursement. Review [Working with Social Security Beneficiaries Directive](#) to determine how much and how best to collect this wage information.**
    - *Acceptable Wage documentation:*
      - Wage Stubs
      - Verification of each months gross earnings from employer on letterhead
      - End of year W-2
      - Self-employment:
        - Annual income tax documents-preferred
          - 1040-ES- estimated tax payment if taxes not available-determined on individual basis
    - Review gross wages to verify that SGA is achieved.
    - Other documents may also be requested from SSI/SSDI beneficiaries as determined necessary.
  - **For all other consumers**, documentation may include but is not limited to:
    - Wage documentation and/or
    - Completion of a questionnaire/employment follow up form or some other type of written report from the consumer that documents how his/her job is going and any additional support needed from DVR. The Monthly Employment Report ([Electronic](#) or [Print](#) Version) is one example of a report that may be used along with wage stubs.
- Use the ERL process to reimburse the consumer.
- Send ERL, wage stubs, and other documents to the Centralized Scanning Unit. Include IRIS number and use naming convention: Employment Wages, if wage documentation.
- Code this service DO48 -- Other Training.