

Division of Vocational Rehabilitation (DVR)

Technical Specifications: Benefits Analysis Services

(Effective July 1, 2009, to June 30, 2010)

Benefits Analysis is a process by which provider staff work directly with DVR consumers to gather the necessary information for a plan to utilize work incentives effectively. One of DVR's goals is to help achieve a substantial increase in the number of SSI Disabled and SSDI beneficiaries who return to work and achieve self-sufficiency.

DVR will pay for benefits analysis for consumers to assist them in their return to work efforts so that they may go off cash benefits. If consumers wish to have a benefits analysis to determine how to continue benefits or who plan to use work incentives as part of long-term employment supports, DVR staff will refer them to programs that provide that service at no cost to DVR (comparable benefit).

The assessment process and report should be completed **within five (5) days of completion of the service and not to exceed 60 days from referral**. To provide a Benefits Analysis, Benefits Specialists will obtain and evaluate comprehensive information about the consumer and report on the following:

- Beneficiary background information,
- Disability,
- Employment and earnings,
- Resources,
- Federal and State benefits,
- Health insurance,
- Work expenses,
- Work incentives, and
- Service(s) and supports.

The report includes a Benefits Management Plan which describes how the individual consumer will use work incentives to their advantage in obtaining and retaining employment.

Benefits Management Plan

Specific components of the plan must address:

- Desired employment outcome including hours and earnings,
- Related steps or activities necessary to achieve the outcome,
- Associated dates or time frames,
- Building on initial benefits planning efforts including information gathering, analysis and advisement, and
- Benefits/financial analysis (pre- and post-employment);

This plan will examine all sources of income currently received by the participant and offer alternatives that maximize employment opportunities and earned income to support the individual's self-sufficiency in working toward a Substantial Gainful Activity level or above.

The analysis should include the determination of Trial Work Period and Extended Period of Eligibility as applicable. The benefits analysis will result in a written report and staffing with the consumer and the DVR staff. The results will be explained to the consumer in their preferred mode of communication. It will generally be conducted as part of the IPE development process, but may be provided later in the VR process to refine an Employment and Support Plan.

Milestone Payment: DVR will pay the applicable fee for the Benefits Analysis upon completion of the analysis, explanation to the consumer and receipt of the appropriate report.