DVR Statewide Service Updates

ANDY JOHNSON

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Questions can be directed to:
andrew.johnson@dwd.wisconsin.gov
Training Objectives

• Understand Work Incentive Benefits Analysis (WIBA) Services
• Understand how a Sample Case will progress
• Understand how to Resolve Case issues – *curveballs*
• Understand changes to Reporting
• Understand changes to the DVR statewide Fee Schedule
• Understand available Tools and Resources
Technical Specifications and Fees

- Process for changes:
  - Research
  - Feedback
  - Workgroups
  - Stakeholder Feedback
  - Editing
Work Incentive Benefits Analysis

About

**Work Incentive Benefits Analysis Services** are intended to assist consumers receiving Social Security disability benefits and other public benefits toward self-sufficiency. These services address questions or concerns related to work and earnings and help consumers navigate benefit, entitlement, and economic assistance programs.

For all services, the referring DVR staff should use the Service Provider Portal to send a message to the service provider summarizing the reason for referral along with what the consumer would like to gain from the service.

There is no set order in which services must be provided. Services should be determined based on the consumer’s current need. Services should be individualized to reflect information the consumer would like to know regarding the authorized service.
Service Description

• Work Incentive Benefits Analysis services:
  o Assist SSI/SSDI consumers
  o Use the Service Provider Portal

• No set order
Benefits Consultation Period & Report Service Details

- May be authorized at any time
- Starting point
- Service length
- Features of the benefits consultation period

- Benefits Consultation Period Report (DVR-18045-E)
Example: Jim

- Jim meets with his DVR counselor and wants to know more about what benefits he has. He also wants to know more about Ticket to Work since this is the program he heard about when he decided to be referred to DVR.

- Jim’s VRC authorizes for a Benefits Consultation and he meets with a benefits counselor to learn more about his benefit status and about how Ticket to Work helps people work off benefits.
Benefits Consultation Period & Report Case Curveballs

• Age 18 Redetermination is overwhelming for the consumer and parent or guardian
  o Refer to ADRC and consider when would be an appropriate time to authorize a WIBA

• Consumer still wants additional information
  o Refer for a full Work Incentive Benefits Analysis as appropriate
Work Incentive Benefits Analysis Meeting Details

- Individualized, comprehensive, foundational
- Emphasizes work incentives
- Recommended in-person meeting
- Up to three additional meetings between consumer and service provider

Work Incentive Benefits Analysis Meeting Report (DVR-18046-E)
Work Incentive Benefits Analysis Meeting
Typical Case Progress

• Example: Jim
  o Jim would like to know more about how working will impact his benefits
  o VRC authorizes for a full WIBA
  o Jim completes the ROIs needed to conduct research for the WIBA with his benefits counselor
  o Jim meets with his VRC and benefits counselor to review the WIBA report
Work Incentive Benefits Analysis Meeting
Case Curveballs

• Can be done if not receiving SSI/SSDI, but receiving county benefits – rare example

• VRC believes Jim needs information broken down into easier to digest materials – requests the benefits counselor bring in some handouts and examples to illustrate scenarios to the consumer

• Consumer or other person wants two meetings to review the materials
Work Incentive Benefits Plan & Meeting Service Details

- Authorized when consumer has a job and would like help accessing work incentives
- Comprehensive plan outlining specific action steps to be taken and responsibilities of each party
- Must provide information about Ticket to Work including processes and responsibilities of reporting income
- Mandatory meeting with consumer, VRC, and benefits counselor together
Work Incentive Benefits Plan & Meeting

Typical Case Progress

• Example: Jim
  o Jim would like help accessing available work incentives
  o Work Incentive Benefits Plan authorized
  o Benefits counselor meets with Jim and VRC to talk about the plan to secure and use work incentives including the role of Ticket to Work and wage reporting
Ticket to Work Benefits Consultation Details

- Authorized when consumer with employment has questions about working off benefits and expresses interest in it.
- Must outline the consumer’s benefit situation including a detailed description of Ticket to Work and Partnership Plus and the availability of Employment Networks serving Wisconsin disability beneficiaries.
Ticket to Work Benefits Consultation
Typical Case Progress

• Example: Jim
  - Jim wants to know more about how to use his Ticket to Work
  - Ticket to Work Benefits Consultation authorized
  - Jim and the benefits counselor meet with the VRC to talk about Ticket to Work and how the consumer can access Partnership Plus services after exit from DVR
Ticket to Work Benefits Consultation Case Curveballs

• The consumer is earning less than Trial Work Level or Substantial Gainful Activity and does not want to continue exploring working off benefits
  o Consumer’s informed choice; honor their preferences
## Service Notes

| $300 | **Benefit Consultation Period Report:** Payable upon completion of acceptable service, meeting, and report to DVR within five (5) business days of the conclusion of the last contact with the consumer. Completion of the service and report not to exceed 45 days from issue of service authorization.  
Code Regular: 022 PRE-ETS: 221 |
| $900 | **Work Incentive Benefits Analysis Meeting Report:** Payable upon completion of acceptable service, meeting, and report to DVR within five (5) business days of the conclusion of the last contact with the consumer. Completion of the service and report not to exceed 45 days from issue of service authorization.  
Code Regular: 022 PRE-ETS: 221 |
| $700 | **Work Incentive Benefits Plan:** Payable upon completion of acceptable service, meeting, and report to DVR within five (5) business days of the conclusion of the last contact with the consumer. Completion of the service and report not to exceed 45 days from issue of service authorization.  
Code Regular: 022 PRE-ETS: 221 |
### Service Notes (cont.)

| $300 | **Benefit Consultation (Ticket to Work) Report:** Payable upon completion of acceptable service, meeting, and report to DVR within five (5) business days of the conclusion of the last contact with the consumer. Completion of the service and report not to exceed 45 days from issue of service authorization.  
Code Regular: 022 PRE-ETS: 221 |
| $600 | **Plan to Achieve Self Support (PASS):** Payable upon completion of acceptable service, meeting, and report to DVR within five (5) business days of the conclusion of the last contact with the consumer. Completion of the service and report not to exceed 45 days from issue of service authorization.  
Code Regular: 022 PRE-ETS: 221 |
# Fiscal Considerations

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<thead>
<tr>
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<th>PO Lines</th>
<th>Timeframe</th>
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<td>None-Consult with VRC</td>
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<tr>
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<td>90 days</td>
<td>None-Consult with VRC</td>
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Service Reports/Forms

- Benefits Consultation Period Report
- Work Incentive Benefits Analysis Meeting Report
- Work Incentive Benefits Plan and Meeting Report
- Benefits Consultation (Ticket to Work) Period Report
Service Resources

• SSA Ticket to Work Site: https://choosework.ssa.gov/

• SSA How Ticket to Work Works: https://choosework.ssa.gov/about/how-it-works/index.html

Questions?

DVRStudyHallQuestions@dwd.wisconsin.gov