

**Maryland State Department of Education
Division of Rehabilitation Services
Referral for Benefits Planning Services**

Benefits planning services are for individuals who already receive SSI and/or SSDI; individuals interested in applying for SSI/SSDI should be referred to their local Social Security Administration office (800-772-1213).

Date: _____

To: Organization: _____
Requested CWIC/Provider: _____

From: DORS Counselor: _____
Phone/TTY: _____ Office Fax: _____
Email Address: _____

Re: DORS Consumer Name: _____ Participant ID: _____
Consumer Phone: _____ Email: _____

Benefits Received: This consumer receives the following benefits:

- | | | |
|-------------------------------------------------------------------------------------|--------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> SSI | <input type="checkbox"/> Medicaid | <input type="checkbox"/> Living at Home Waiver |
| <input type="checkbox"/> SSDI | <input type="checkbox"/> Food Stamps | <input type="checkbox"/> Unemployment Benefits |
| <input type="checkbox"/> Medicare | <input type="checkbox"/> Section 8 Housing | <input type="checkbox"/> Private Disability Benefits |
| <input type="checkbox"/> This consumer receives SSI and/or SSDI based on blindness. | | |

Self-Employment: This consumer is is not interested in self-employment.

This consumer participates in the **Business Enterprise Program for the Blind**.

Employment Goal: Not determined at this time.

Reasonable Accommodations. This consumer:

- does not require reasonable accommodations.
 does require reasonable accommodations to participate in benefits planning services, as follows:

Menu of Services: Select from the following services for your consumer.

1. Pre-employment Consultation: \$200. DORS Counselor may request without additional approval. This service is for **eligible DORS consumers**. While usually provided early in the rehabilitation process, it is available for **all consumers except those in Application status**. This service involves one face-to-face meeting of 1½ to 2 hours. This is for an individual who may be ambivalent about working. (Individuals who are sure they want to work should be referred for #2 below.) It includes basic education about benefits counseling services and a description of various levels of service. In making a referral, the DORS counselor should verify if the consumer receives SSI and/or SSDI, and whether he/she has Medicaid or Medicare. The provider shall provide a summary letter to the consumer and referring DORS counselor with an explanation of work incentives and other pertinent information discussed. The letter will be sent with the invoice for the service no later than 3 weeks after the service was provided.

2. Pre-employment Benefits Summary & Analysis: \$750. Requires approval of the DORS supervisor. This service is for **DORS consumers in Service status and beyond who have a specific employment goal on the DORS Individualized Plan for Employment (IPE) and are reasonably close to beginning to seek a specific position**. Service should be completed within 2 months and is anticipated to take up to 18 hours for the provider. Two face-to-face meetings: the first to begin to gather information, begin to verify benefits and impact, give an overview of work incentives, find out important support persons in the consumer's life; the second toward the end to discuss results and next steps, to include the DORS counselor and consumer and

consumer's representative and other support providers as appropriate. This service is for individuals who feel confident they want to work, and have an idea of the type of work they want to do but have not yet been offered a specific job. It includes verification of benefits through the Benefits Planning Query (BPQY), gathering information about benefits from all relevant sources, such as SSA, Medicaid, Medicare, food stamps, subsidized housing, and conducting a detailed, in-person intake interview with the consumer to begin to analyze which work incentives could apply to their situation and the impact considering various scenarios (i.e., not working, working part-time and working full-time).

The provider shall forward documentation of the service to the consumer and DORS counselor no later than 3 weeks after provision, which shall include a written Benefits Analysis document, and a Bottom Line Comparison. Relevant brochures and fact sheets will also be provided. This documentation shall be forwarded to the DORS counselor with the invoice for the service.

3. Written Work Incentive Analysis: \$500. Requires approval of the DORS Regional/Program Director. This service is for **DORS consumers in Service status and beyond who have a specific offer of employment or have started employment.** It should be completed within 2 months, and is anticipated to take up to 12 hours. Two face-to-face meetings, the first to begin to gather information, begin to verify benefits and impact, give an overview of work incentives, find out important support persons in the consumer's life; the second toward the end to discuss results and next steps, to include the DORS counselor and consumer and consumer's representative and other support providers as appropriate. This service includes verification of benefits (BPQY), gathering information about benefits from all relevant sources, such as SSA, Medicaid, Medicare, food stamps, subsidized housing, etc., and conducting a detailed, in-person intake interview with the consumer to begin to analyze which work incentives could apply to their situation.

The provider shall forward documentation of the service to the consumer and DORS counselor no later than 3 weeks after provision, which shall include a written Benefits Analysis document and a Bottom Line Comparison detailing financial results of not working vs. working in the designated job. Relevant brochures and fact sheets will also be provided. This documentation shall be forwarded to the DORS counselor with the invoice for the service.

4. Additional Services: \$42/hour. DORS can request other services such as:

- Going to an SSA office with a consumer to establish an impairment-related work expense (IRWE).
- Working with an employer to establish a subsidy.
- Solving a specific benefits issue, e.g., overpayment.
- Developing a Work Incentives Plan (WIP).
- Establishing a Plan for Achieving Self Support.
- Providing consultation regarding impact of internship stipend on benefits.
- Providing a revised benefits analysis if the person gets a raise.
- Benefits Check – when an individual has a change in their benefit status (e.g., increase, decrease, suspension) or their employment situation changes (e.g., new job, promotion, termination); this would be a reassessment of how changes would impact benefits. An addendum to the Benefits Summary and Analysis would be provided.

The provider will forward documentation to the consumer and DORS pertinent to the specific service, along with the invoice to DORS.

Additional Comments:
