

<b>Topic:</b>	Benefits Counseling for Employment Path Services
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## Overview

This worker's guide outlines requirements related to Benefits Counseling delivered as part of ODDS Employment Path Community Services. This guide also includes:

- I. Service Description and Requirements
- II. Provider Training and Certification Requirements (Must be verified by a case manager before authorizing service)
- III. Authorizing Benefits Counseling
- IV. Approving Billing for Benefits Counseling
- V. Additional Monitoring

## I. Service Description & Requirements

Benefits Counseling services are available through ODDS and Medicaid-funded Employment Path Community services. As outlined in further detail below, ODDS Benefits Counseling includes two levels of service: 1) Level One: Information and Referral; 2) Level Two: Work Incentive Summary (WIS) or a Benefits Summary and Analysis (BSA).

### 1. Level one: Information & Referral

The Benefits Counselor will provide general information to the individual regarding public benefits and various work incentives based on the information provided. The Benefits Counselor will ask a series of questions that are designed to prompt a discussion about the person's current circumstances to help determine if there are any issues that may require immediate action or a more comprehensive level of services. The Counselor should also be evaluating the need for other supports the person may require related to employment or other aspects of life. At this stage, the Benefits Counselor has not necessarily verified which public benefits the person is utilizing and/or is eligible to receive.

The consultation will include a review of fact sheets and other materials that provide basic information about benefits and work incentives that the person might utilize. The Benefits Counselor will be able to assess the person's

questions/concerns about benefits and working, and provide preliminary information regarding how benefits can be managed while working. The Benefits Counselor must also provide the person with a written advisement that outlines the information discussed. Because the person's benefits have not yet been verified, the Benefits Counselor will not be able to provide detailed answers during this phase of services. This level of service can typically be completed in one meeting.

## **2. Level Two: Work Incentive Summary (WIS) or Benefits Summary and Analysis (BSA)**

During Level Two services (Work Incentive Summary or Benefits Summary and Analysis) the Benefits Counselor will conduct an in-depth interview with the person to assess the issues and questions related to that person's benefits and working. The Counselor will obtain verification of the person's current benefits, confirm any benefit issues that need to be resolved, and identify relevant work incentives to recommend.

The Work Incentive Summary or Benefits Summary and Analysis provide a personalized written report about the person's public benefits and relevant work incentives. These two types of reports include either:

- A Work Incentive Summary (WIS) for those who do not have a job goal yet and summarizes the work incentives that will allow them to financially get ahead when working; or
- A Benefits Summary & Analysis (BSA) for those who have an idea of how much they will work and earn. This report analyzes how a specific earning goal will impact benefits the person has and recommends specific work incentives.

### **When is the second level of Benefits Counseling services needed?**

During Initial Information and Referral, the Benefits Counselor will utilize a decision tree to determine if the individual could benefit from a Work Incentive Summary (WIS) or a Benefits Summary & Analysis (BSA). A Work Incentive Summary or Benefits Summary and Analysis may be appropriate if the individual, for example:

- Receives Supplemental Security Income (SSI) and is working;
- Expects to start working in the next two months;
- Is interested in using a Plan to Achieve Self-Support (PASS);
- Receives a reduced Federal Benefit Rate (FBR) and has questions;

- Receives Social Security Disability Insurance (SSDI), Childhood Disability Benefit (CDB), or Disabled Widow(ers) Benefit (DWB) and has worked above Trial Work Period (TWP) threshold since entitlement; or
- The person or others are concerned about the impact working might have on the person's benefits and more information is needed.

Note that the above are examples of reasons why a WIS or BSA may be needed. There may be other reasons for needing a WIS or BSA.

## II. Provider Training and Certification Requirements

Only certified and endorsed employment service agencies may deliver ODDS-funded Benefits Counseling. Benefits counseling may only be delivered by a qualified and certified Benefits Counselor who is employed by an ODDS employment service agency. Benefits Counseling may be delivered as part of Employment Path Community services.

A Benefits Counselor must be on the list of ODDS-approved Benefits Counselors. Before authorizing a Benefits Counselor to provide Benefits Counseling, the Case managers must verify the Benefits Counselor is on the list of ODDS-approved Benefits Counselors found on the [Employment Policy website](#). The case manager must also independently verify the Benefits Counselor maintains current training and certification requirements.

An employment professional can be added to the list of qualified Benefits Counselors by sending information regarding the required certification to: [employment.first@dhsosha.state.or.us](mailto:employment.first@dhsosha.state.or.us)

Training and certification requirements include the following:

- Benefits Counselors must maintain one of the following approved certifications for Benefits Counseling:
  1. Oregon WIN Certification
  2. [VCU/Social Security Administration Certification](#)
  3. [Cornell Certification](#)
  4. Any other Department-Approved Substantial Equivalent.
- Benefits Counselors must demonstrate competencies of an employment professional by completing the online modules within one year of hire.

- The continuing education required to maintain approved benefits counseling certifications satisfy the requirement that employment professionals complete 12 hours of annual supported employment training.
- Holding an approved Benefits Counseling certification is sufficient for requirements that employment professionals take an approved training within 90 days of delivering services.
- Prior to the delivery of Benefits Counseling services, and annually thereafter, a Benefits Counselor must submit a written WIS or BSA to ODDS for review.
- Approved Benefits Counselors may participate in monthly technical assistance calls administered by DHS.

### III. Authorizing Benefits Counseling

The case manager may authorize Benefits Counseling if it is anticipated it will be needed within the upcoming ISP year. An ISP change of service form may also be completed if circumstances arise during the ISP year that mean Benefits Counseling is needed.

Employment Path Community - Benefits Counseling Services				
Level 1	Information & Referral	OR541 (WB)	May be authorized if the person is interested in working, but has questions or concerns related to benefits.	Up to 3 hours per plan year. Additional hours must be approved by the case manager.
Level 2	Work Incentive Summary (WIS) or Benefits Summary & Analysis (BSA)	OR541 (WC)	Is generally authorized when a person has a job and questions or concerns related to benefits.	Up to 12 hours per plan year. Additional hours must be approved by the case manager.

Both Level One and Level Two should be authorized if it is anticipated the person will get a job shortly and has questions or concern regarding benefits.

See the ODDS expenditure guidelines for additional information, including information regarding the rate.

## **How many hours can be used for Benefits Counseling services?**

It is estimated that up to three hours may be needed (per plan year) for Information and Referral (Level One) services. If additional hours are needed, an exception must be requested by the person or provider and approved by the case manager.

It is estimated that up to 12 hours may be needed (per plan year) for the Work Incentive Summary or Benefits Summary and Analysis or (WIS\BSA) Service. If additional hours are needed, an exception must be requested by the person or provider and approved by the case manager, or a referral to WIN or WIPA should be made.

ODDS Benefits Counseling should include a meeting with the person to get background information and to provide resources and information to the person, but, similar to Professional Behavior Services, some hours may be billed for time spent writing reports, time spent verifying information regarding the client's benefits, or other similar Benefits Counseling activities required to advise the client being served. If additional hours are needed, beyond the 25 hours per week limit on Employment Path Services (or a combination of ODDS Employment Services), then an exception must be submitted to ODDS for review.

The entire support team should be actively involved in benefits counseling so they are able to provide ongoing supports after these services end. Natural supports should be brought in whenever possible.

## **IV. Approving Billing for Benefits Counseling**

An outcome of Information & Referral services will also include a write up of the advisement. A referral for Work Incentive Summary or Benefits Summary and Analysis (WIS\BSA) is not necessary for payment of this service to occur. If Level One services (Information & Referral) result in a determination that Level Two services are needed (to complete a Work Incentive Summary or Benefits Summary and Analysis (WIS\BSA)), then Level Two services are generally provided within two months from completion of the Level One Benefits counseling.

The outcomes of Level Two services include:

1. A report (the WIS or BSA) that summarizes the individual's current benefit status, explain relevant work incentives and provide recommendations for

addressing any benefit issues. These include an action plan of next steps that identify what items or issues need to be addressed, who is responsible, etc. This may be reporting wages to Social Security, follow along supports, etc. Once the report is completed, the Benefits Counselor will review the document with the individual and others the individual wants to have a detailed explanation of the content.

2. A referral to Work Incentive Plan Services if necessary. The need for this service will be assessed after a WIS or BSA is completed. This referral is not required for a service payment to occur.

## **V. Additional Monitoring**

- ODDS will verify Benefits Counselors have met qualification and training requirement upon enrollment. Benefits Counselors approved to deliver Benefits Counseling services will be on the list of approved providers.
- Licensing will verify qualifications during licensing reviews.
- Training and certification will also be tracked by ODDS through iLearn.

## **Technical Assistance**

- Available through WIN Administration or ODDS.
- Certified Benefits Counselors are expected to participate in monthly technical assistance calls available through DHS.

## **Form(s) that apply:**

## **Definition(s):**

## **Reference(s):**

### **Work Incentives Network ([WIN](#)):**

A free benefits and work incentives counseling program provided by the Department of Human Services with administration and technical assistance housed with the Vocational Rehabilitation program. Services are provided by 11 Certified Work Incentive Coordinators (WICs) who are located in Independent Living Centers around the state.

Contact: [win.refer@state.or.us](mailto:win.refer@state.or.us) or 1-800-661-2571,  
<http://www.oregon.gov/DHS/EMPLOYMENT/VR/WIN/>

## **Oregon's Work Incentives Planning and Assistance ([WIPA](#)):**

Social Security holds a cooperative agreement with Disability Rights Oregon (DRO) to provide community-based Work Incentives expertise to beneficiaries of Social Security or Supplemental Security Income (SSI) to enable beneficiaries with disabilities to receive accurate information and use that information to make a successful transition to work. Counseling is provided by Community Work Incentives Counselors (CWIC).

Contact: [pfw@droregon.org](mailto:pfw@droregon.org) or 1-833-438-7308

## **VCU Certification Information:**

<https://vcu-ntdc.org/training/initial/initial.cfm>

## **Cornell Certification Information:**

<http://www.ytionline.org/courses>

## **Frequently Asked Questions:**

Question: What is the rate for ODDS Benefits Counseling?

Answer: ODDS Benefits Counseling (both level one and level two) may currently be billed at the employment path community rate. Additional information is in the ODDS Expenditure Guidelines.

Question: Can Benefits Counseling be used as a stand-alone service, or does it have to occur with other employment path community service at the same time?

Answer: Benefits Counseling may occur as a stand-alone Employment Path Community service.

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