# Vocational Rehabilitation Standards for Providers Manual Chapter 26: Benefits and Work Incentives Counseling Services

Revised January 16, 2024

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## 26.3 Supplemental Security Income and/or Title II Disability Benefits

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### 26.3.2 Supplemental Security Income and/or Title II Benefits Summary and Analysis/Work Incentive Plan

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#### 26.3.2.2 Process and Procedures

The benefits counselor receives:

* a VR1512, Benefits and Work Incentives Planning Referral, requesting a BSA/WIP;
* an SSA BPQY; and
* an SA.

The benefits counselor schedules a meeting with the customer. The meeting should be scheduled within 10 working days from receipt of the TWS-VRS referral. If the customer does not respond to the benefits counselor’s phone, email, or text message to schedule an appointment within five business days of the date on the VR1512, the benefits counselor should request the referring VR counselor’s assistance in contacting the customer.

When the BPQY is submitted with the VR referral packet, the benefits counselor should make every effort to review the completed BSA/WIP packet with the customer within 30 business days after the date on the VR1512.

When the BPQY is not submitted with the VR referral packet and the benefits counselor must obtain the BPQY, the benefits counselor should make every effort to review the completed BSA/WIP packet with the customer within 60 business days after the date on the VR1512.

At the BSA/WIP meeting, the benefits counselor provides an overview of the customer’s SSA disability benefit program and associated health care, as well as detailed information on how anticipated or current earned income will affect SSA disability cash and other benefits. Generic fact sheets about the customer’s SSA disability program, Medicaid/Medicare, and other benefits programs may be offered for additional information. All questions and concerns in the VR1512 Benefits and Work Incentives Planning Supports and Services Requested section must be specifically addressed in the BSA/WIP documentation.

BSA/WIP documentation must contain each of the following seven sections in the order listed. Each section must contain the information listed.

* Section One: Summary of Customer’s Current Situation
  + List of SSA and other benefits received to be addressed in the BSA/WIP
  + Type of benefit and how that information was verified
  + Current cash benefit amount awarded, current net benefit the customer is receiving, and how those amounts were verified
  + Value of SNAP benefit and how receipt of this benefit was verified
  + Type of health care coverage, including any private insurance plans, and how that information was verified
  + Monthly health insurance premiums, if applicable, and how that information was verified
  + Name of representative payee or authorized representative, if applicable
  + Overpayment balance and monthly overpayment recovery amount, if applicable
  + Name of home-and community-based services waivers the customer receives, if applicable

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### 26.3.3 Veteran’s Supplemental Security Income and/or Title II Benefits Summary and Analysis/Work Incentive Plan

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#### 26.3.3.2 Process and Procedures

The benefits counselor receives:

* a VR1512, Benefits and Work Incentives Planning Referral, requesting a Veteran’s BSA/WIP;
* an SSA BPQY; and
* an SA.

The benefits counselor schedules a meeting with the customer. The meeting should be scheduled within 10 working days from receipt of the TWS-VRS referral. If the customer does not respond to the benefits counselor’s phone, email, or text message to schedule an appointment within five business days of the date on the VR1512, the benefits counselor should request the referring VR counselor’s assistance in contacting the customer.

When a BPQY is submitted with the VR referral packet, the benefits counselor should make every effort to review the completed Veteran’s BSA/WIP packet with the customer within 30 business days after the date on the VR1512.

When a BPQY is not submitted with the VR referral packet and the benefits counselor must obtain the BPQY, the benefits counselor should make every effort to review the completed Veteran’s BSA/WIP packet with the customer within 60 business days after the date on the VR1512.

At the Veteran’s BSA/WIP meeting, the benefits counselor provides an overview of the customer’s SSA disability benefit program and associated health care, as well as detailed information on how anticipated or current earned income will affect SSA disability, VA, and other benefits. Generic fact sheets about the customer’s SSA disability program, Medicaid/Medicare, VA, and other benefits programs may be offered for additional information. All questions and concerns in the VR1512 Benefits and Work Incentives Planning Supports and Services Requested section must be specifically addressed in the Veteran’s BSA/WIP documentation.

Veteran’s BSA/WIPs must contain each of the following seven sections in the order listed. Each section must contain the information listed:

* Section One: Summary of Customer’s Current Situation
  + A list of SSA and other benefits received to be addressed in the Veteran’s BSA/WIP
  + Type of benefit and how that information was verified
  + Current cash benefit amount awarded, current net cash benefit the customer is receiving, and how that information was verified
  + Value of SNAP benefit and how receipt of this benefit was verified
  + Type of health care coverage, including any private insurance plans, and how that information was verified
  + Cost of monthly health insurance premiums, if applicable, and how that information was verified
  + Name of representative payee or authorized representative, if applicable
  + Overpayment balance and monthly overpayment recovery amount, if applicable
  + Name of home- and community-based services waivers the customer receives, if applicable

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