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Work Incentives Benefits Counseling and its Role in Employment for Family Care, Family Care Partnership and PACE members

Purpose: This resource memo is intended to explain the relationship between Work Incentive Benefits Counseling (WIBC) and supporting employment outcomes for members in Family Care, Family Care Partnership and PACE. This memo will define and explain:

- The aim of WIBC;
- Providers of WIBC services in Wisconsin;
- The aspects of the WIBC service;
- The effectiveness of WIBC to support members' employment outcomes;
- Other ways to access or fund WIBC services;
- Describes WIBC scenarios; and
- The process to code WIBC in Encounter.

The aim of Work Incentives Benefits Counseling

People with significant disabilities may be concerned about working toward employment because of concerns that earnings will affect their eligibility for needed benefits, including disability benefits and Medicaid. Many studies¹ state that the fear of losing disability benefits is a barrier for people with disabilities gaining employment, or career advancement. The purpose of WIBC is to give people the information they need to make truly informed decisions about their employment options. WIBC has been associated with improved employment outcomes, such as higher earnings and higher employment rates.²

Work Incentives Benefits Counseling in the Family Care, PACE and Partnership benefit packages

WIBC is included in the Family Care benefit package, but it is not a stand-alone service. It can be funded under Supported Employment "benefits management" or Vocational Futures Planning and Supports (VFPS) services as "benefits analysis and support."³ Providers of WIBC must meet the provider qualifications for VFPS or Supported Employment depending on which

¹ Lui, J. et al. Roles and functions of benefits counseling specialists: A multi-trait analysis. *Journal of Vocational Rehabilitation* 32 (2010) 163-173.

R. Roessler, TWWIA initiatives and work incentives: Return to work implications, *Journal of Rehabilitation* 68(3) (2002), 11-16.

² Delin, B.S., Hartman, E.C., & Sell, C.W. (2012). The impact of work incentive benefits counseling on employment outcomes: Evidence from two return-to-work demonstrations. *Journal of Vocational Rehabilitation*, 36, 97-107.

Tremblay, T., Smith, J., Zie, H., & Drake, R. (2004). The impact of specialized benefits counseling services on Social Security Administration disability beneficiaries in Vermont. *Journal of Rehabilitation*, 70, 5-11.

³ Definitions found within Supported Employment and Vocational Futures Planning and Supports services in the Family Care contract language.

service WIBC is provided under. Information about coding this service is included at the end of this memo.

Providers of Work Incentive Benefits Counseling

A *Work Incentives Benefits Specialist (WIBS)* is a person who provides individualized and specific benefits information and analysis to members so they understand if and how their benefits would be affected by employment.

A WIBS may practice independently, or work for independent living centers, community rehabilitation providers, or non-profits organizations. There is no formal certification requirement to be a WIBS in Wisconsin. Some WIBS are members of the Work Incentive Benefits Specialist Association (www.wibsa.org). These members are required to fulfill a peer review process, have ongoing training, and must adhere to a professional code of conduct. A list of association members in good standing can be found on the website noted above.

Aspects of the Work Incentive Benefits Counseling service

The WIBC service typically involves an individualized benefits analysis to help a member understand the impact of income from employment on their disability benefits, including Medicaid acute/primary and long-term care benefits. The benefits analysis is written in summary form, and is explained in an in-person meeting with the member. The member may invite anyone they wish to the meeting. This face-to face meeting is typically a one-time service. Some follow-along time may be available to address questions and minor changes in the member's situation after the initial meeting.

The WIBS verifies the member's benefits with the agency that provides the benefit, and explains the potential impact of employment related to each disability benefit the person receives. For example, the WIBS explains to the member the affect of employment on Social Security payments, Medicaid, and other publicly-funded benefits. For some people with disabilities, accurate information regarding work incentives will be essential to them getting and keeping a job.

The WIBS assists a member, with involvement of the member's Interdisciplinary Team, to make an informed choice about pursuing employment by providing information about:

- Member benefits that may change by going to work.
- Member's benefits that may change as the result of increased work earnings.
- The possibility of a cost-share for member health and long-term care benefits that may result from employment earnings and identifying that this may be financially advantageous.
- The availability of Social Security Work Incentives for a working member which may offset employment related costs.
- Training or others resources that could be obtained to start employment.

Usefulness of WIBC to members

A member may find WIBC services useful in the following instances:

- Working for the first time;
- Increasing his or her earnings;

- Re-entering the workforce;
- Developing a career plan;
- Actively seeking a job; and
- Experiencing issues with current benefits due to employment.

Discussion of employment and the WIBC service with members

Some members, and/or their family members, may be hesitant or concerned about working related to concerns about fear of loss of benefit payments or health insurance.

- Research shows employment is positively related to improved health⁴ and quality of life⁵ for people with disabilities.
- There are a number of work incentives available that make work possible, with little impact on benefits for some people. These would be explained in the WIBC service.
- Research also has shown the WIBC service has been linked to increased employment for those who have received this service. In this study, WIBC took an average of eight service hours per person⁶.
- The information provided in the WIBC service allows a person to make informed decisions when planning his or her employment goals, and to address concerns related to starting or returning to work.

Other ways to access or fund WIBC services

- Members interested in competitive integrated employment can apply to DVR. If a member is a DVR consumer, then DVR may authorize a work incentive benefits analysis if it is part of the consumer's employment plan. See the DVR technical specifications in the link below for details on the services provided, including rates for WIBC: www.dwd.wisconsin.gov/dvr/info_ctr/services/default.htm
- [The Ticket to Work and Work Incentives Improvement Act of 1999](#) authorized Social Security to award grants to community-based organizations throughout the U.S. and the U.S. territories. This grant program, called [Work Incentives Planning and Assistance \(WIPA\)](#), provides SSDI and SSI disability beneficiaries (including transition-to-work aged youth) with free access to information about work incentives, benefits planning, job placement and career development. **This program is set to restart August 1, 2013 after over a yearlong lapse in funding.** There may be other eligibility criteria not yet known with this new funding cycle, as well. Only past WIPA providers are eligible to apply for funding from SSA. Past providers in Wisconsin included [Riverfront, Inc.](#), [Employment Resources, Inc.](#), and [IndependenceFirst](#). These WIPA providers may also be another resource for members.

⁴ Hartman, E.C. (2008). The relationship between employment and health: A literature review.

⁵ Eggleton, I., Robertson, S., Ryan, J. & Kober, R. (1999). The impact of employment on the quality of life of people with an intellectual disability. *Journal of Vocational Rehabilitation, 13*, 95-107.

⁶ Delin, B.S., Hartman, E.C., & Sell, C.W. (2012). The impact of work incentive benefits counseling on employment outcomes: Evidence from two return-to-work demonstrations. *Journal of Vocational Rehabilitation, 36*, 97-107.

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Work Incentive Benefits Counseling scenarios

The following scenarios are examples of the process and benefits that members may experience as a result of WIBC.

1. A member has not yet applied to DVR, but would like to understand how their benefits may change by working. The Interdisciplinary Team works with the member to decide if the member wishes to pursue integrated and community-based employment with assistance from DVR.
 - If member wishes to pursue integrated and community-based employment, then the member should apply for DVR services. After the member applies for DVR services, is found eligible, and has an open case; then the member may obtain the WIBC service through a DVR authorization, if it is necessary for the individual to reach his or her employment goal.
 - If the member is unsure if he or she would like to pursue integrated and community-based employment because of concerns about the impact of work on his/her benefits, then the Interdisciplinary Team will use the Member-Centered Planning Process to identify whether WIBC services are necessary to help the member explore employment as a possible outcome. This service could be purchased by the MCO, or provided through the WIPA providers.
2. A member is interested in employment and is on a wait list for DVR services.
 - The Interdisciplinary Team will use the Member-Centered Planning Process to identify the member's long-term care outcomes and will authorize services necessary to help the member achieve those outcomes. If the IDT concludes that the member can wait for the WIBC service until he or she is eligible for DVR services, then the member will follow that process. If the IDT concludes that the member needs WIBC information prior to starting DVR services, then WIBC may be purchased through Family Care benefit package or by having the member contact the WIPA project to see if this service is available.
3. A member is an active DVR consumer and is pursuing an employment goal. The member would like to understand how their benefits will change by going to work.
 - The member can request that WIBC services be authorized by their DVR counselor. If the member and the DVR counselor agree that the service is necessary to reach the employment goal, then the DVR counselor can authorize the service. The member should be given a choice of DVR approved WIBC providers by the DVR counselor.

The process to code WIBC in Encounter

The MCO will code the WIBC provided by the MCO, as follows:

- The procedure code and modifiers for WIBC is added to either integrated Supported Employment or Vocational Futures Planning and Support (VFPS); and
- U6 is added to the procedure code modifier to identify the service as WIBC.

The following table provides further detail related to the correct procedure codes and modifiers.

Employment Service	Type	Time Units	Procedure Code	Modifier	WIBC	SPC
Pre-Vocational	Community-based	15 min	T2015	UA/U8		108
		1 hour	T2015	UA		108
		per diem	T2014	UA		108
		each	T2014	UA/U7		108
	Facility-based	15 min	T2015	UB/U8		108
		1 hour	T2015	UB		108
		per diem	T2014	UB		108
		each	T2014	UB/U7		108
Supported Employment	1 to 2 (Integrated)	15 min	T2019	UN	U6	615
		per diem	T2018	UN	U6	615
		each	T2018	UN/U7	U6	615
	3 to 8 (Group)	15 min	T2019	UP		615
		per diem	T2018	UP		615
		each	T2018	UP/U7		615
Vocational Futures Planning and Support (VFPS)	N/A	15 min	T2038	HJ/U8	U6	114
		per diem	T2038	HJ/U9	U6	114
		each	T2038	HJ	U6	114

<p>Primary Modifiers: UA = Community Based Pre-Vocational UB = Facility Based Pre-Vocational UN = 1 to 2, Integrated Supported Employment UP = 3 to 8, Group Supported Employment HJ = Employee Assistance Program Vocational Futures Planning and Support (VFPS)</p> <p>Secondary Modifiers: U7 = Each U8 = Periodic (1 unit = 15 min, 4 units = 1 hour, etc.) U9 = Per Diem U6 = Work Incentive Benefits Counseling</p>

For any questions concerning this process, please email DHSOFCE@wisconsin.gov.