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

Purpose: To explain the relationship between Work Incentive Benefits Counseling (WIBC) and supporting competitive integrated employment (CIE) outcomes for members in Family Care, Family Care Partnership, and PACE (Program of All-Inclusive Care for the Elderly).

This memo will define and explain:

1. The aim of WIBC.
2. Where WIBC services are specified in the contracts between the Wisconsin Department of Health Services (DHS) and managed care organizations (MCOs) for Family Care and Family Care Partnership, and PACE.
3. Providers of WIBC services in Wisconsin.
4. The aspects of the WIBC service.
5. The usefulness of WIBC services to support members' CIE outcomes.
6. Discussion of CIE and the WIBC service with members.
7. Ways to access or fund WIBC services.
8. WIBC scenarios.
9. The process to code WIBC in encounter.

1. The Aim of WIBC

The aim of WIBC is to provide members with the information they need to make informed decisions about their employment options. Members may be concerned that earnings will affect their eligibility for public benefits, including cash disability benefits and Medicaid. Studies find that the fear of losing disability benefits is a barrier for people with disabilities to pursue CIE or career advancement.¹ WIBC has been associated with improved employment outcomes, such as higher earnings and higher employment rates.²

2. WIBC in the Family Care, Family Care Partnership, and PACE Benefit Packages

WIBC is included in the managed long-term care benefit packages, but it is not a stand-alone service. WIBC can be funded under supported employment-individual support “benefits management” or vocational futures planning and support (VFPS) services as “benefits

¹ Hartman, E. C., Anderson, C. A., Chan, J., Fried, J. H., & Lui, J. W. (2015). An exploration of work incentive benefits specialist's experiences. *Journal of Applied Rehabilitation Counseling*, 46(3), 25–34.

² Hartman, E. et al., An exploration of work incentive benefits, 46(3), 25–34; 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.

analysis and support.”³ Providers of WIBC must meet the provider qualifications for VFPS or supported employment-individual support depending on which service it is provided under.

3. Providers of WIBC

A work incentives benefits specialist (WIBS) is a person who provides individualized benefits information and analysis to members so they understand if and how their benefits will be affected by employment.

A WIBS may practice independently or work for independent living centers, community rehabilitation providers, or non-profit organizations. There is no formal certification requirement to be a WIBS in Wisconsin. However, it is best practice for a WIBS to be trained in both federal and state benefits. Some training options are [Yang-Tan Institute on Employment and Disability](#) at Cornell University, the Virginia Commonwealth University [National Training and Data Center](#), and [Employment Resources, Inc.](#) When providing WIBS for Family Care, Family Care Partnership, and PACE members, the WIBS must also meet the HCBS waiver requirements stated in supported employment-individual support or Vocational Futures Planning Service (VFPS). WIBS may also decide to join the [National Association of Benefits and Work Incentive Specialist](#) (NABWIS) for a professional membership to an organization devoted to providing work incentive benefits counseling.

4. Aspects of the WIBC Service

First, the WIBS obtains a release of information from the member to obtain private health information (PHI). The WIBC service typically involves an individualized benefits analysis to help the member understand the impact of income from employment on their disability benefits, including Medicaid acute and primary care 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. The MCO should recommend that someone, such as a trusted MCO interdisciplinary team (IDT) staff member, legal decision-maker, family member, or friend accompany the member to this meeting because the information tends to be complex. This face-to-face meeting is the beginning of an on-going service that follows the member through their employment process. WIBC follow-along service means the WIBS continues to assist the member for up to one year with questions and clarifications along their employment path. The WIBS addresses member, IDT staff, and legal decision-maker questions and clarifies any information about changes in the member’s employment status 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 member receives. For example, the WIBS explains to the member the effect of employment on Social Security payments, Medicaid, and other publicly funded benefits. For some members, accurate information regarding work incentives will be essential to them obtaining and retaining a job.

³ Definitions found within the DHS MCO Family Care/Family Care Partnership contract and DHS PACE contract under Service Definitions: Supported Employment-Individual Employment Support and Vocational Futures Planning and Support.

Information provided in WIBC services includes:

- The member's current benefits
- Benefits that may change as the result of increased work earnings
- Options and costs for health and long-term care benefits (for example, cost share vs. Medicaid Purchase Plan Premium that may result from employment earnings)
- The availability of Social Security Work Incentives for a working member
- Foreseeable points of benefit changes
- Contact information for agencies to which the member will need to report earnings
- Training or other resources to start employment

5. Usefulness of WIBC services to Members

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

- Working for the first time
- Increasing their earnings
- Re-entering the workforce
- Developing a career plan
- Actively seeking a job
- Experiencing issues with current benefits due to employment

6. Discussion of CIE and the WIBC Service with Members

Some members and their family members may be hesitant or concerned about losing benefits payments or health insurance because of working. A low-or no-pressure presentation, informed by motivational interviewing practices may be the best approach.⁴

Discussion topics may include:

- Research showing that employment is positively related to improved health and quality of life for people with disabilities.⁵
- Explanation that several work incentives may be available that make work possible with little impact on benefits for many people. Social Security work incentives are explained to people when they receive the WIBC service.
- Research showing that WIBC service has been linked to increased employment for those who have received this service.⁶

⁴ Britt, E., Sawatzky, R., & Swibaker, K. (2018). Motivational interviewing to promote employment. *Journal of Employment Counseling*, 55, 176-184.

⁵ Hartman, E.C. (2008). The relationship between employment and health, A literature review; Beyer, S., Brown, T., Akandi, R., & Rapley, M. (2010) [A comparison of quality of life outcomes for people with intellectual disabilities in supported employment, day services, and employment enterprises](#), *Journal of Applied Research in Intellectual Disabilities*, 23(3), 290-295; Dean, E. E., Shorgren, K.A., Hagiwara, M., & Wehmeyer, M.L. (2018). [How does employment influence health outcomes? A systematic review of the intellectual disability literature](#). *Journal of Rehabilitation*, 49(10) 1-13; Iwanage, K., Wu, J. R., Chan, F., Rumrill, P., Wehman, P., Brooke, V.A. Avellone, L., & Taylor, J. (2021) [A systematic review of systematic reviews of secondary health conditions, health promotion, and employment of people with intellectual disabilities](#). *The Australian Journal of Rehabilitation Counseling*, 27(1), 1-28.

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. Wilhelm, S. & McCormick, S. (2013). The impact of a written benefits analysis by Utah benefit counseling/WIPA program on vocational rehabilitation outcomes. *Journal of Vocational Rehabilitation*, 39, 219-228.

- Information about WIBC service that allows a person to make an informed decision when planning their employment goals and addressing concerns related to starting or returning to work.⁷

7. Other Ways to Access Funds for WIBC Services

The Division of Vocational Rehabilitation (DVR) provides services for individuals with disabilities to obtain, maintain, or advance in CIE. Members interested in CIE can complete a referral for DVR services. If a member is found eligible, DVR may authorize a WIBC if it is part of the consumer's individual plan for employment (IPE). Research supports work incentive benefits counseling provided in conjunction with DVR services a necessary intervention for people seeking employment who are receiving Social Security Disability Insurance (SSDI), Social Security Insurance (SSI), or public medical benefits such as Medicaid or Medicare.⁸ DVR can provide several different benefits consultation services and has a listing of potential providers. See the DVR technical specifications for details on the [WIBC services provided through DVR](#).

- [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 and benefits planning.
- For more information about WIPA services in Wisconsin, contact Wisconsin WIPA at 877-826-1752. You can also find information on [ERI's website](#).

8. WIBC Services Scenarios

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

1. The member has not yet applied to DVR but would like to understand how their benefits are affected by working. The IDT staff works with the member to decide if the member wishes to pursue CIE with assistance from DVR.
 - If the member wishes to pursue CIE, then the member should apply for DVR services. The member may obtain the WIBC service through a DVR authorization once eligible for DVR services.
 - If the member is unsure if they would like to pursue CIE because of concerns about the impact of work on their benefits, then the IDT will use the member-centered planning process to identify whether WIBC services are necessary to meet the member's long-term care outcome.
2. The member is interested in employment and is waiting for DVR services.
 - The IDT staff will use the member-centered planning process to identify the member's long-term care outcomes and can authorize services necessary to assist the member achieve those outcomes. If IDT staff conclude that the member needs WIBC information prior to starting DVR services, then the member could contact the WIPA

⁷ Schlegelmilch, A., Roskowski, M., Anderson, C., Hartman, E., & Decker-Maurer, H. (2019). [The impact of work incentives benefits counseling on employment outcomes of transition-age youth receiving Supplemental Security Income \(SSI\) benefits](#). *Journal of Vocational Rehabilitation*, 51(2), 127-136.

⁸ Schlegelmilch, A. et al., The impact of work incentives benefits counseling on employment outcomes of transition-age youth receiving Supplemental Security Income (SSI) benefits. *Journal of Vocational Rehabilitation*, 51(2), 127-136. <https://doi.org/10.3233/JVR-191032>

to receive free access to information or the IDT could authorize WIBC services as part of the member's member-centered plan.

3. The member is an active DVR consumer and is pursuing an employment goal.
 - The member may 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 will authorize the service. The member should be given a choice of DVR approved WIBC providers by the DVR counselor.

9. The Process to Code WIBC Services in Encounter

The MCO codes the WIBC service funded by the MCO as follows:

- The procedure code and modifiers for WIBC is added to either supported employment-individual services or VFPS.
- 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	WIBS	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 Person (Individual)	15 min	T2019	UN	U6	615
		per diem	T2018	UN	U6	615
		each	T2018	UN/U7	U6	615
	2-8 People (Group)	15 min	T2019	UP		615
		per diem	T2018	UP		615
		each	T2018	UP/U7		615
VFPS	N/A	15 min	T2038	HJ/U8	U6	114
		Per diem	T2038	HJ/U9	U6	114
		each	T2038	HJ	U6	114

Primary Modifiers:

UA= Community Based Pre-Vocational

UB= Facility-Based Pre-Vocational

UN= 1 Person Individual Supported Employment

UP= 2 to 8 People, Group Supported Employment

HJ= Employee Assistance Program VFPS

Secondary Modifiers:

U7 = Each

U8 = Periodic 1 unit =15 min, 4 units = 1 hour, etc.)

U9 = Per Diem

U6 = WIBC

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