

Proposed Policy Changes for Financial Need Assessment

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Financial Need Assessment Policy and Proposed Changes:

Deleted wording is marked through. New wording is typed in bold font.

206.1.01

Financial need criteria shall be applied in each case where VR Program funds are to be utilized, except when an individual has been determined eligible for Social Security benefits under Titles II or XVI of the Social Security Act, or TANF.

Financial need shall be assessed when considering any paid service, except the following services, which are exempt from this policy (*Revised 11/15/2010*):

- A. Assessment for determining eligibility and priority for services except those non-assessment services that are provided to an individual participating in trial work experiences or an extended evaluation; Refer to 208.0.00 and 210.0.00
- B. Assessment for determining the employment outcome and vocational rehabilitation service needs to be included in the work plan. If appropriate, this may include an assessment by personnel skilled in rehabilitation technology; Refer to 302.0.00
- C. Vocational rehabilitation counseling and guidance, including information and support services to assist an individual in exercising informed choice; Refer to 410.0.00 and 424.0.00
- D. Referral and other services necessary to assist applicants and eligible individuals to secure needed services from other agencies, including other components of the statewide workforce investment system, and to advise those individuals about client assistance programs; Refer to 418.0.00
- E. Job-related services such as job search and placement assistance, job-retention services, follow-up services, follow-along services, and Supported Employment; Refer to 416.0.00 and 424.0.00 (See Glossary: Job Retention Services)
- F. Personal assistance services for daily living activities when provided with other services leading to an employment outcome ~~to assist an individual with a qualified disability to participate in a primary service~~; Refer to 480.0.00 (See Glossary: Personal Assistance Services)

G. Any auxiliary aid or service that an individual with a disability requires to effectively receive and communicate information in order to participate in the VR program such as reader services, interpreter services, alternate formats; Refer to 470.0.00 and 476.0.00 (See Glossary: Auxiliary Aid or Service)

~~H. As a condition for furnishing any vocational rehabilitation service if the individual has been determined eligible for Social Security benefits under Titles II or XVI of the Social Security Act;~~

H. Adjustment services including but not limited to community adjustment, work adjustment, personal & social adjustment, work readiness, and adjustment to disability services such as orientation and mobility, technology access training, auditory training and cognitive rehabilitation therapy; Refer to 404.0.00, 452.0.00, 476.0.00, 436.0.00, 440.0.00 (See Glossary: Adjustment to Disability Services)

~~H.I. Vocational training provided at a Georgia Vocational Rehabilitation Agency residential rehabilitation program on the premises of a VR Program operated facility.~~

J. Rehabilitation technology, including telecommunications, sensory and other technological aids and services.

K. The following services when provided in post-employment status: Assessment for determining eligibility and priority (see A above); Vocational rehabilitation counseling and guidance (see C above); Referral and other services necessary to assist applicants and eligible individuals to secure needed services from other agencies (see D above); Job-related services (see E above); and Rehabilitation technology (see J above).

206.1.02

~~Financial need assessment shall be completed prior to the authorization of VR Program funds for any supportive service except those directly related to authorization and/or provision of a diagnostic or assessment service(s).~~ **Support Services are subject to the same financial need assessment determination as the primary service(s) they support unless they are specifically exempt from financial consideration.**

206.1.03

~~An individual who is a current recipient of Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI), and/or Temporary Assistance to Needy Families (TANF) shall be considered categorically to meet the financial need assessment criteria as shown and certified on the Financial Need Assessment form.~~

206.1.04

The Financial Need Assessment form in **Appendix C** shall be completed in each case requiring establishment of financial need. All financial resources of the individual must be considered in completing the Financial Need Assessment form.

206.1.05 7

In completing the Financial Need Assessment form, the vocational rehabilitation counselor shall ask the individual to supply his/her previous year's federal tax return and their parents, if appropriate. Other written documentation, e.g. payroll receipts, benefit records, etc., maybe required as support for his/her claimed economic circumstances. Vocational rehabilitation services requiring the meeting of financial need criteria shall not be provided until the individual has been determined to meet these criteria.

206.1.06

Until a client reaches the age of 24, the income and/or resources of the client's parents or guardians shall be included in the financial need assessment unless the individual meets one of the following criteria: *(Revised 5/1/13)*

- A) is married,
- B) is a graduate or professional student,
- C) is a veteran, or a member of the armed forces,
- D) is an orphan,
- E) is a ward of the court,
- F) is someone with legal dependents other than a spouse,
- G) is an emancipated minor, ~~or~~
- H) is someone who is homeless at risk of becoming homeless,
- I) is exiting a transition center or correctional facility, or**
- J) has established that he/she is not claimed as a dependent by his/her parent(s).**

206.1.07 5

The Financial Need Assessment form shall be completed on each individual ~~at application, or as soon thereafter as practical,~~ when it is anticipated or known that VR Program funds are to be utilized for services other than those specified in 206.1.01 and 206.1.02. The Financial Need Assessment form shall project the individual's financial circumstances over the next 52 week period. A copy of the Financial Need Assessment form shall be given to the client.

206.1.08

The financial need assessment of an individual shall be reviewed annually and at any time the vocational rehabilitation counselor becomes aware of a change in the individual's economic circumstances which might affect ~~continued meeting of the~~ **individual's financial need (including award of SSI/SSDI/TANF benefits)** ~~criteria~~.

~~Additionally, if the client fails to continue to meet the financial need criteria for paid services, while services are in progress, only those services already authorized for payment and initiated in the work plan and/or any approved amendments shall be provided. No additional authorizations for payment for the services shall be made. If a client is in an academic (college/university) or vocational training program or curriculum, services already initiated will be continued through refers to the current quarter or semester. No further primary or supportive training services requiring financial need shall be sponsored by the VR Program until financial need is re-established. When a new case is opened or when post employment services are provided, financial need must be re-established.~~

206.1.09

Instructions for completing the Financial Need Assessment form:

A. Dependent of another person:

If the individual is ~~the~~ dependent of another person whose income is being counted in the income section, then mark yes.

B. Number of members in a family unit:

This is the number of family members ~~and~~ who are financially dependent on one another. Tax returns may be used to verify dependent relationships.

C. Section I and Section II of the Financial Need Assessment form:

The vocational rehabilitation counselor shall complete either Section I or Section II of the Financial Need Assessment form **in consultation with the client** and then ~~certification of~~ financial need **when appropriate**.

D. Certification of receipt of Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI), or Temporary Assistance to Needy Families (TANF):

The individual shall be considered categorically to meet financial need criteria if he/she is a current recipient of SSI, SSDI and/or TANF. The vocational rehabilitation counselor must, however, complete the certification at the bottom of the form.

E. Income:

This section includes gross income anticipated during the next 52-week period. Student financial aid, e.g., HOPE, PELL, SEOG, scholarships, student

loans, etc. are not counted as income when determining financial need.

Parental or guardian income for a client who has reached 24 years of age or who meets the exception criteria in cite 206.1.7 shall not be counted when determining financial need.

~~F.~~ **Liquid Assets:**

~~This section refers to cash assets, savings or assets readily convertible to cash such as stocks, bonds, cash value of life insurance, etc.~~

~~G~~ **F. VR Program Allowance *Sliding Scale*:**

~~This figure sliding scale is obtained from~~ **determined by** the VR Program Allowance Table for Financial Need ~~is published separately found in~~ **Appendix C. The client's participation in the cost of services is based on the amount of income over the VR Allowance. Dependent on this amount, the client will be expected to contribute a percentage of their income up to a maximum amount. This** The allowance table is computed at **150%** of the Federal Poverty Level ~~and it will be reviewed and/or revised annually to reflect any changes in that level. Any revised table shall be published at the beginning of the state's fiscal year.~~

~~H~~ **G. Disability related expenses:**

In this section, the vocational rehabilitation counselor may list any client disability related expenses that are being paid by the client or by anyone counted for financial need assessment. The vocational rehabilitation counselor may request verification of the amount(s) and confirmation of payment(s). Disability related expenses which are included as a part of financial need assessment and, by virtue of their inclusion, cause the financial need criteria to be met may not later be authorized and paid by the Program. **Allowable disability related expenses are deducted from the individual's total resources when calculating financial need.**

NOTE: The disability related expenses can only be expenses related to the client's disability. Disability related expenses may be considered when they are being paid by the client or by anyone counted for financial need assessment. Future planned/projected expenses may not be included. Past expenses may be included only when they have been financed and payments are being paid routinely and regularly. These expenses may be counted only as they relate to the primary and/or secondary impairment(s) used to establish eligibility.

~~I~~ **H. Client certification:**

The individual or, as appropriate, his/her parent or guardian, must sign and date the form in the appropriate place certifying the truth of the information which appears at the top portion of the form.

↓ I. Certification of financial need:

The vocational rehabilitation counselor must certify on the form the individual whose name appears as a part of the certification is within the established limit for the provision of paid vocational rehabilitation services.

A copy shall be given to the client.

New 138.1.03:

If a comparable benefit for a service is made available to a client in-state, but the client chooses not to accept the benefit or chooses to participate in services out of state, VR support for that service will be limited to the same level of support VR would have provided had the client accepted the benefit and/or remained in-state.

446.1.03

The VR Program may assist with tuition, required school fees, books/supplies and, as appropriate, maintenance (housing and meals) only at any approved state, private, out-of-state post secondary school, or proprietary school for an approved course of study. Verification that the school is approved must be made prior to any obligation to the client verbally, in a Work Plan or through an authorization of funds. **VR support for approved tuition and fees shall be determined by the Business Unit and based on the HOPE Tuition Allowance Schedule of cost for these services at the appropriate level of each public post secondary schools in Georgia under the Technical College System of Georgia (TCSG) or the Board of Regents.** Levels of post secondary Georgia public schools include technical schools, junior colleges, senior colleges, regional universities, and universities. If a specific course of study for a specialized skill which is required as an industry standard for employment in a specific vocational goal is not available in Georgia public schools, as determined by the Business Unit, tuition and fees shall be determined by the Business Unit based on the actual cost of the specialized skills training at institutions offering the required course of study. Labor market information based on actual statistics must be obtained and reviewed prior to agreeing to provide VR Support. Refer to Glossary: Comparable Program of Study; Proprietary School; Specialized Skills Training)

446.1.10

VR Program assistance with post secondary training shall be limited, during the first two years, to a public institution within 35 miles of the client's residence unless:

- a) the required coursework for the client's program of study is not available at the local college, or
- b) the coursework will not transfer to a four year institution when a four year degree is required for the work goal.

446.1.11

When the VR Counselor has determined maintenance (which includes housing and meals) is appropriate and necessary, **VR shall authorize no more than the monthly individual amount for SSI. Proof of payment for maintenance provided for housing/lodging is required. (Revised. 10-29-12)**

446.1.24

The VR Program may assist with payment for the following ancillary services:

- C. Required books/supplies **up to the maximum rate** as determined by the Business Unit **but not exceeding the actual cost. Proof of payment reflecting books and supplies purchased is required.**

472.1.08

Maintenance shall be paid as follows:

- E. Meals may be authorized at a cost not to exceed the VR Program's maximum allowable fee per meal. **One meal may be authorized for every 7 hours an individual is away from home participating in a primary vocational rehabilitation service. However, ~~Up to three meals a day may be authorized at a rate of one per each six hours when, or any portion thereof that~~ the individual is away from home participating in a primary vocational rehabilitation service **for a 24-hour period;** ~~(For example, an individual who is away from home for twelve hours may receive two meals.)~~**

480.1.02

Personal care attendant service will only be considered for an individual if:

- A. a Georgia Waiver has not been made available to the individual,
- B. the client is receiving services/training out of state because the service or training is not available in state, or
- C. the number of hours needed to participate in a primary VR services, as determined by the AWT unit Occupational Therapist, exceeds the number of waiver hours funded. In this instance, VR may approve additional hours.

The client will need to provide proof that he/she is on a waiting list before an authorization will be made.