

DORS Benefits Counseling Vendor Fact Sheet

Benefits counseling services are a very important part of career decision making for DORS consumers who receive Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI). DORS recognizes that certified benefits counselors are skilled in helping these consumers determine the effect of working on their benefits and are knowledgeable about the work incentives available to beneficiaries.

As such, DORS approves qualified benefits counselors to provide services to consumers through a fee-for-service model. To obtain approval as a benefits counseling vendor, applicants are required to have completed a course of training and achieved credentials in benefits counseling as outlined below.

Approved Providers

Approved individual providers must demonstrate and document one of the following qualifications. Approved organizations must provide information to DORS confirming that all benefits counseling staff providing the service to DORS consumers comply with one of the following:

- **Community Work Incentive Coordinator (CWIC)**. The CWIC designation applies to benefits planners employed by Work Incentive Planning & Assistance (WIPA) organizations. The CWIC designation also applies to benefits counselors employed by organizations under contract to and affiliated with a local WIPA. CWIC training and certification is provided by Virginia Commonwealth University National Training & Data Center (VCU/NTDC). A CWIC must achieve certified status and satisfy requirements to maintain CWIC certification as specified by VCU annually (12 Continuing Certification Credits through training provided by VCU/NTDC; 3 credits for submission and approval of a Benefits Summary and Analysis report; and 3 credits for state and local training events which **must be approved by the WIPA Social Security Project Officer**).
- **Community Partner Work Incentives Counselor (CPWIC)**. The CPWIC designation applies to benefits counselors employed by Community Partner organizations. CPWIC training and certification is provided by Virginia Commonwealth University (VCU). A CPWIC must achieve certified status and satisfy requirements to maintain certification as specified by VCU annually (18 Continuing Certification Credits earned through **training provided only by VCU/NTDC**).
- **Work Incentive Practitioner**. This designation applies to benefits counselors who have completed the Cornell University Work Incentives Planning & Utilization for Benefit Practitioners Online Certificate course and have satisfied requirements to maintain this credential (60 Continuing Education Units for **training approved by Cornell** within 5 years of obtaining certification).

Please note: DORS does not require any additional initial certification process beyond VCU/NTDC or Cornell. Nor does DORS require additional maintenance of credentials beyond the Continuing Certification Credits or Continuing Education Units specified above.

Vendor Approval Process

In addition to the completion of the above training and certification, individuals and organizations who seek DORS approval as benefits counseling vendors must also submit the following:

- Provider/Vendor Application (RS-9g) and Addendum which are available on the [DORS website](#).
- Documentation of having completed the VCU provisional or full certification or satisfied the Cornell credentialing requirements. If an applicant has provisional CWIC or CPWIC certification but has not yet completed the VCU requirements for full certification, information regarding completion date will be required. A copy of the full certification, once completed, will also be required.
- Approved providers **must submit annual evidence** of having successfully satisfied the continuing educational requirements to maintain the credential as specified by the educational institution.
 - Providers who have obtained certification through VCU must provide documentation of the annual certification renewal.
 - Providers who have obtained certification through Cornell must provide documentation of annual progress in obtaining the requisite CEUs required for Cornell (copies of completed CEUs to date). To ensure providers demonstrate current knowledge, DORS requires that benefits counselors with this certification demonstrate at least 30 CEU credits (of the 60 required) within 36 months of certification. Additionally, the vendor must provide documentation that all 60 credits are completed within the 5 year timeframe as established by Cornell.

Ethical Standards

As part of the approval process, benefits counseling services providers must agree to the terms of the DORS Ethical Standards Agreement for Benefits Counseling Vendors and sign the DORS Ethical Standards Agreement for Benefits Counseling Vendors – Acknowledgement. Both the Agreement and Acknowledgement are available on the [DORS website](#).

Menu of Individualized Services – Fee for Services

In consultation with the consumer, DORS counselors shall select the most appropriate service type and generate a referral for the service to the benefits counseling vendor. In-person, individualized consultations are expected and preferred. Provision of initial services by phone require a special exception and justification. However, follow up by phone or email, may be appropriate.

- **Pre-employment Consultation - \$235:** This service is usually for eligible DORS consumers early in the rehabilitation process and who may be ambivalent about working or who express an interest in working but have little idea what field they may pursue and are working with their DORS counselor to identify employment options.

The Pre-Employment Consultation should be completed within 1 month of referral and include one face-to-face meeting of 1½ to 2 hours with the benefits counselor and consumer (and consumer supports if applicable) to review current benefits and consumer concerns. The benefits counselor will also obtain/analyze a Benefits Planning Query (BPQY) for the individual. As documentation of the service, the benefits counselor will provide a summary letter to the consumer and referring DORS counselor with an explanation of work incentives, the impact of working on various benefits, and included findings from (and a copy of) the BPQY. The letter and BPQY should be sent with the invoice for the service, no later than three weeks after the service was provided.

No show fee: If, after the DORS counselor and provider have contacted the individual about the meeting and the consumer fails to attend, a \$50 no show fee may be invoiced by the benefits counselor.

- **Benefits Summary & Analysis (BS&A) - \$665:** (If the above Pre-Employment Consultation including the BPQY at the \$235 rate was provided to the consumer by the benefits counseling vendor within the prior six months, the fee for this service is reduced by \$135 to \$530. The fee reduction will not apply if the consumer's circumstances have changed so significantly since the consultation that the information contained in the pre-employment consultation letter is no longer applicable.)

The Benefits Summary and Analysis is usually for DORS consumers who are sure that they want to work and have an idea what type of work they want to pursue. This service is also appropriate for consumers who are already employed or have been offered a position. The BS&A should be completed within two months of authorization, and is anticipated to take up to 18 hours for the benefits counseling provider.

The BS&A should include at least two face-to-face meetings. The first meeting should be a detailed, in-person intake interview to gather information, identify applicable work incentives, provide an overview of work incentives to consumer, and identify important support persons in the consumer's life. The first meeting should occur within one month of vendor receipt of DORS referral. The second meeting will be to discuss results of the BPQY analysis including the impact of various work scenarios to include not working, working part time, and working fulltime at or above SGA. Next steps for the consumer should be provided and the meeting should include the DORS counselor, consumer, and consumer's representative and other support providers as appropriate.

Documentation of the service must be provided no later than three weeks after provision. The written Benefits Summary & Analysis should include a copy of the verification of benefits through the Benefits Planning Query (BPQY) as well as information gathered about benefits from all relevant sources including SSA, Medicaid, Medicare, food stamps, subsidized housing, etc., a Bottom Line Comparison of various work scenarios, and a copy of the BPQY (if not previously provided during a Pre-Employment Consultation). This documentation with relevant brochures and fact sheets shall be provided to the consumer and referring DORS counselor along with the invoice for the service.

- **Follow-up:** The benefits counselor shall provide up to three hours of consultation subsequent to provision of this service without additional charge. If additional hours of consultation are needed and justified, the benefits counselor may request paid consultation (See Additional Services).
- **No show fee:** If the DORS consumer becomes non-responsive after three attempts and notification to the DORS counselor (after the second attempt), the provider may bill DORS for one quarter of the fee and the service will be suspended.
- **Additional Services - \$42/hour:** Providers will offer the following services at an hourly rate, with pertinent documentation provided to the DORS counselor along with the invoice no later than three weeks after the service is provided:
 - a. **Establishing an SSA Work Incentive** (e.g., Impairment Related Work Expense (IRWE), Blind Work Expense, Student Earned Income Exclusion, Subsidy/Special Condition, Unsuccessful Work Attempt).
 - b. **Establishing a non-SSA Work Incentive** (e.g., Employed Individuals with Disabilities, HUD Earned Income Disregard, Individual Development Account).
 - c. **Solving a Specific Benefits Issue** (e.g., requesting reconsideration or waiver of overpayment, attending hearing meeting with SSA representative).
 - d. **Developing a Work Incentives Plan (WIP).**
 - e. **Assisting with work review by SSA** (review by SSA of recent earnings and impact on benefits).
 - f. **Establishing a Plan for Achieving Self Support (PASS).**
 - g. **Providing consultation regarding impact of internship stipend on benefits.**
 - h. **Providing follow-up consultation** beyond 3 hours for an individual who has had a Pre-Employment Benefits Summary and Analysis or a Written Work Incentives Analysis within 6 to 12 months.
 - i. **Providing a revised Benefits Summary & Analysis** if earnings and/or income increase, a change in benefit entitlement (e.g., from SSI to SSDI), etc.
 - j. **Benefits Check** . When a change occurs in benefit status (e.g., increase, decrease, suspension) or employment situation (e.g., new job, promotion, termination). These changes would require a reassessment of how changes would impact benefits and an addendum to the Benefits Summary and Analysis.
 - k. **Other issues.** This requires a description of and justification for the specific service requested to be submitted to the regional/program director for approval, regardless of the number of hours requested.

DORS Selection of Provider

In those instances where an organization is approved to be a vendor for benefits counseling services, DORS reserves the right to request a specific benefits counselor in making a referral for services. The organization may set certain conditions for referrals to a specific benefits counselor (i.e., only for consumers within a specific geographic area, limits on numbers of referrals), but the organization may not substitute a different benefits counselor for the one requested unless DORS consents.

Referral Process

DORS Staff shall use Form RS-1h, Referral for Benefits Planning Services in making a benefits counseling referral, and shall include as much relevant information with the referral as is available.

ASL Interpreter Services

DORS will arrange and pay the cost of interpreter services required for consumers who are deaf to participate in benefits counseling services.

Payment for Vendor/Provider Travel - \$35/hour

Every attempt will be made to schedule several consumers for benefits counseling on the same day at the same location. Providers/vendors may invoice for travel time only once when multiple consumers are seen in the same visit. See Payment for Benefits Counselor Travel Time on the Benefits Planning page, Specialized Resources on InDORS.

For additional information and inquiries contact:

Thomas Scheurich (by phone: 410-554-9307 or by email: Thomas.Scheurich@maryland.gov)