



<b>Policy No.</b> 314	<b>Subject:</b> Benefits Planning Services
<b>Section:</b> Services in Support of Rehabilitation	<b>Revised:</b> 01/2019
<b>Signature:</b> Brandy McOmber, Resource Manager	<b>Version:</b> FINAL

**1. PURPOSE**

IVRS recognizes the importance and value of benefits planning services. Staff are trained to provide these services to job candidates who are beneficiaries of Social Security Disability Insurance (SSDI) and/or Supplemental Security Income (SSI). IVRS staff in each office have been selected to serve as Benefits Planning Cadre members to provide benefits planning services and are available to assist throughout the rehabilitation process as needed. IVRS staff are required to provide or arrange for benefits planning services for any job candidate who receives benefits through the Social Security Administration (SSA) due to a disability.

**2. DEFINITIONS**

Please refer to the [Social Security website](#) for applicable definitions.

**3. AGENCY EXPECTATIONS**

- a. IVRS staff will initiate a conversation with the job candidate at the time of intake regarding benefits planning and work incentives.
- b. IVRS staff provide benefits planning services to job candidates. Staff may also consult with and/or refer job candidates to the Benefits Planning Cadre, or to external resources, as appropriate.
- c. IVRS staff will ask the job candidate to sign a release of information for the Benefits Planning Query (BPQY) at intake and/or at any other point in time when it is necessary. Every beneficiary is considered a Ticket to Work (TTW) Ticketholder. The signature on the Individualized Plan for Employment (IPE) assigns the TTW to IVRS if it is available. If the TTW is already assigned, the job candidate may be asked to un-assign their TTW to allow IVRS to place it in-use.



- d. Ongoing benefits planning will continue as the IPE progresses to assist the job candidate with understanding work incentives.
- e. When a job candidate obtains employment, IVRS facilitates ongoing benefits planning services through Partnership Plus Agreements with various Employment Networks (ENs). An email is sent to staff of all TTW holders in status 22-0. Staff update the EN referral section on the IPE-2 or IPE-3 and enter the selection into IRSS. It is the job candidate's choice whether they choose to work with an EN, and if so, which EN they choose to work with.
- f. The month after the case closure is entered into IRSS, the TTW is removed from in-use with IVRS through SSA's Ticket Portal. If the TTW needs to be removed from in-use sooner, a request can be sent to the [IVRSSATTW@iowa.gov](mailto:IVRSSATTW@iowa.gov) as soon as the case is closed in IRSS.
- g. The TTW continues to be valuable to the job candidate after IVRS closes the case file. IVRS has partnered with ENs with whom the job candidate can assign their TTW after IVRS case closure. The ENs provide a continuation of services to assist the job candidate to maintain, and perhaps advance in, their employment.
- h. If the TTW is assigned to an EN within 90 days of case closure, the job candidate may continue to benefit from Continuing Disability Review protection. The EN benefits by receiving payments from SSA for Milestones and Outcomes reached.

#### **4. EXCEPTIONS**

- a. None

#### **5. APPLICABLE FORMS**

- a. IVRS Ticket Unassignment Form
- b. Ticket to Work Cheat Sheet for Counselors
- c. TTW Brochure
- d. Current IVRS EN Partners
- e. IVRS EN TTW Memorandum of Agreement
- f. Brochure for Job Candidate at Intake and/or Eligibility
- g. EN Handoff Letter – ST 22 EN Handoff Letter – ST 26