

PARTICIPATION OF INDIVIDUALS IN COST OF SERVICES BASED ON FINANCIAL NEED

The Georgia Department of Labor (GDOL)/Vocational Rehabilitation (VR) Program continues to apply a financial need policy. This policy is applied consistently statewide.

Persons who receive Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) are exempt from financial need considerations. Services exempt from financial need consideration include those mandated to be exempt by the Regulations of the Rehabilitation Act, as amended in 1998.

206.0.00 FINANCIAL NEED ASSESSMENT

206.1.00 Policy

206.1.01 Financial need criteria shall be applied in each case where program funds are to be utilized except for the following services which are exempt from this policy.

- A. Services necessary to provide information to and to receive information from the client using an alternative appropriate mode of communication, as appropriate.
- B. Diagnostic
- C. Assessment including evaluation
- D. Counseling, guidance, referral, information and referral, and placement
- E. Adjustment services including job coaching
- F. Supported Employment
- G. Vocational Training on the Premises of a division operated community rehabilitation program (Refer to 452.0.00)
- H. Work Readiness Training (Refer to 452.0.00)
- I. Reader Services
- J. Personal Assistance Services

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 the authorization for any supportive service directly related to the authorization and/or provision of a diagnostic or assessment services(s).

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.

206.2.00 PROCEDURE

206.2.01 The financial need assessment form 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. This includes the resources of the spouse and/or anyone legally responsible for the support of the individual unless the individual meets criteria to be categorically eligible to meet the financial need assessment criteria.

206.2.02 In completing the financial need assessment form, the vocational rehabilitation counselor may ask the individual to supply written documentation, e.g., payroll receipts, tax records, benefit records, etc., as support for his/her claimed economic circumstances. No vocational rehabilitation services requiring the meeting of financial need criteria shall be provided until the individual has been determined to meet these criteria.

206.2.03 As needed, for the purpose of determining dependency, the VR Program shall look only to the original tax returns of the persons claiming the individual as a dependent and not to any amended federal tax returns filed by such person deleting the individual as a dependent for the purpose of defeating or circumventing this policy.

206.2.04 When an applicant/client reaches the age of 18 or becomes an emancipated minor, the income and/or resources or the applicant/client's parents or guardians shall not be included in financial need assessment.

206.2.05 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.

206.2.06 The financial need assessment of an individual shall be reviewed annually or at anytime the vocational rehabilitation counselor becomes aware of a change in the individual's economic circumstances which might affect continuing the continued meeting of the financial need criteria. If the client fails to continue to meet the financial need criteria for paid services, only those services already initiated in the work plan and/or any approved amendments shall be provided. If a client is in an

academic (college/university) or vocational training program or curriculum, “services already initiated” refers to the current quarter or semester and the following quarter or semester. No further primary or supportive training services requiring financial need will 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.

Instructions for completing Financial Need Assessment

1. 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.

2. Number in a Family Unit

This is the number of family members by blood or marriage who function as a family and who are financially dependent on one another. An individual who has reached the age of 18 or is an emancipated minor with no dependents and is not claimed as a dependent by another person, or is an emancipated minor with no dependents who is not married shall be considered a family of one. The income and resources of parents or guardians of those who have reached age 18 or who are emancipated minors shall not be counted for financial need assessment.

3. Section I and Section II of the Financial New Assessment Form

The vocational rehabilitation counselor shall complete either Section I or Section II of the financial need assessment form and the certification of financial need.

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

The individual shall be considered categorically to meet financial need criteria if s/he 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.

5. Income

This section includes gross income anticipated during the next 52-week period. Student financial aid, e.g., HOPE, PELL, SEOG, scholarships, student loan, etc., are not counted as income when determining financial need. Parental or guardian income for an applicant/client who has reached 18 years of age of who is an emancipated minor shall not be counted when determining financial need.

6. Liquid Assets

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

7. Rehabilitation Services Allowance

This figure is obtained from the VR Program Allowance Table for Financial Need that is published separately. This table will be reviewed annually to be at 225% of the federal poverty level. 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 new fiscal year.

8. Disability Related Medical 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 are included as a part of financial need assessment, and by virtue of their inclusion cause the financial need criteria to be met.

Note: The disability related expenses can only be expenses related to the client's disability. Disability related expenses shall be considered when they are being paid by the client or by anyone counted for financial need assessment.

Future planned/projected expenses cannot be included. Past expenses may be included only to the degree that the amount is actually being paid routinely and regularly. These expenses may be counted only as they relate to the primary and/or secondary impairment(s) used to established eligibility.

9. Client Certification

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

10. Certification of Financial Need

The vocational rehabilitation counselor shall 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.

206.3.00 INFORMATION

206.3.01 If an individual fails to meet the financial need criteria for purchased vocational rehabilitation services, the vocational rehabilitation counselor should encourage the individual to utilize his/her personal resources to a point that the financial need criteria can be met. Financial need may then be recalculated (using the Financial Need Assessment Spend Down Form) to establish financial need.

206.3.02 Unless an individual has reached age 18 or is an emancipated minor, s/he is defined as being a dependent of another person if:

1. The individual was included in the last year's federal income tax return of some one else as a dependent, or
2. If no federal income tax returns were filed, the individual could have been claimed by someone else as a dependent for federal tax purposes.

206.3.03 By definition, an emancipated minor is a person under age 18 years of age who is totally self supporting and is not claimed on the last year's tax return of another individual.