VCU Work Incentive Planning and Assistance National Training Center

vcu-ntc.org

What Goes Where???

WORK INCENTIVES PLAN

Beneficiary Name: **Date:**

Benefits Summary & Analysis review date: **Beneficiary Initials:**

Employment Goal:

Accessing Employment Services and Supports			
Action Step	**Person Responsible**	**Target Date**	**Completed Date**
Information in this section should only pertain to necessary assistance to obtain employment. For example: job placement assistance, transportation, assistive technology, etc.			
Resolving Existing Benefits Issues			
This section assigns action steps necessary to resolve problems that you identified on the BPQY or during the intake discussion. For example: excess resources, incorrect SGA level, improper application of VTR rule, etc.			
Managing SSA Benefits and Work Incentives			
This section is all about the work incentives and the impact of employment. Steps included here would include: tracking and documenting work incentives usage, reporting earnings, development and			

monitoring of PASS, etc.			
Managing Federal, State or Local Benefit Programs			
Information about all other benefits received in relation to work belongs in this section. Be sure to address all applicable benefits such as: HUD, food stamps, veteran's benefits, unemployment, worker's comp, other PDB, etc.			
Action Step	**Person Responsible**	**Target Date**	**Completed Date**
Planning for Future Healthcare Needs			
Action steps here should relate to Medicare, including QMB, SLMB, QI1, low income subsidy, etc., Medicaid, Medicaid waivers, employer healthcare, etc.			
Follow-up Contact Plan			
This section identifies all the future points of contact and the reason. This should address all critical touch points and events that impact benefits. For example: upon employment, ongoing monitoring of PASS, at critical birthdays, upon resolution of problems, tracking work incentives usage, reporting to SSA, etc.			

Beneficiary Signature: Date:

CWIC Signature: Date: