

Question: What do CWICS need to know about verification of other federal benefits?

Most CWICs are aware of the importance of verifying SSA benefits prior to offering advisement and have processes in place to obtain a BPOY or other form of verification. However, when it comes to verification of other federal benefits, there is some confusion as to what kind of verification is needed and how to go about getting it. Questions CWICs may ask include: Is it ok to get verbal verification from an employee at the SNAP or Medicaid office? Can I get a letter from the beneficiary? What happens if I run into difficulties obtaining verifications?

CWICs must remember that ALL benefits must be verified prior to offering any advisement. This includes verification of all other benefits that an individual may receive. It is irresponsible and unprofessional to advise about benefits that have not been verified. Also, it is necessary to have documentation of verification on file for all benefits the beneficiary receives. If you are providing ongoing follow-up services, it will be necessary to update these verifications at least annually, but more often if benefit changes occur.

Verification would include either written verification or verbal verification from the agency administering the benefit, or from a partner agency that shares a data system with the primary benefit agency. An example of this might be a CWIC who works at a state Vocational Rehabilitation agency obtaining verification of Medicaid benefits from a database that Vocational Rehabilitation uses. It is not appropriate to obtain verification from a third party, such as a case manager who got verification of SNAP benefits, for example. More and more agencies are using the internet to allow beneficiaries to request verification of benefits online, so be sure to check and see if this option exists in your area.

It is imperative that CWICs develop knowledgeable contacts at each of the other federal, state and local agencies that beneficiaries may be involved with. Each agency will have its own method of obtaining verification. Be prepared to provide signed consent forms if the beneficiary does not have correspondence to corroborate. It may be helpful to work with other CWICs in your area to develop a benefit verification reference guide, once a workable procedure has been established. It can also be helpful to attend interagency councils or roundtables to meet and network with other human service professionals in your community.

It is not enough to simply verify the receipt of other benefits! Be prepared to verify all pertinent information; particularly that related to time-limited income exclusions for other programs, or participation in special programs within the other benefit program. For example: Clients receiving housing assistance have an earned income disregard for specific amounts over specific periods of time; it is imperative that the CWIC knows if any or all of the income exclusion months have already been used prior to offering advisement about the impact of earnings. During the course of obtaining verification, you may identify benefits issues that need to be resolved. Be prepared to work with the beneficiary in this capacity.

Be sure to keep documentation of benefits verification in the hard copy of the beneficiary case file. This may consist of a statement, report or letter from the administering agency. If the verification was provided verbally, document this in the case notes. The note needs to state who verified the information and when, a summary of the details provided, and it must be signed and dated by the CWIC.

Remember, providing accurate benefits advisement is the cornerstone of WIPA services, and is an indicator of the quality and integrity of your WIPA project. The key to obtaining verification of other federal benefits is to build relationships with the staff in local benefit agencies, and establishing a mutually agreed-upon method for doing so. Communication with other CWICs and your TA Liaison is a valuable way to gain expertise in this area.