# Item 4 Detail Sheet: Benefits Planning, SRC Recommendation 2021.4

# SRC Recommendation 2021.4 – Work Incentive Planning Information (September 2, 2021)

The SRC recommends DOR expand consumers’ access to Work Incentive Planning (WIP) information and services by providing WIP information and services so the consumer can make an informed choice. WIP services should be consistent throughout California in the following ways:

1. Before, during and after the consumer’s individualized plan for employment is written.
2. Virtually through on-line materials and a recorded video that provides an overview of work incentive information and explanation of DOR WIP services. (Materials and video must meet website accessibility requirements).
3. Provide WIP information to family members of consumers (who may be impacted).

# DOR Response to SRC Recommendation 2021.4 (May 6, 2022)

The DOR appreciates the SRC’s recommendations to expand consumers’ access to DOR’s WIP information and services. Currently, DOR Districts provide this service to Potentially Eligible (PE) and Vocational Rehabilitation (VR) consumers receiving Supplemental Security Income and/or Social Security Disability Insurance. PE consumers receive DOR WIP services either in a group setting to learn financial literacy skills or on an individual basis if they are planning for or participating in paid work experience as part of their DOR Student Services. VR consumers receive DOR WIP services either in Service-J status, Employed status or Service status or in their final quarter or semester of training. Some benefits planning services may also be provided during other stages of the VR process through the Work Incentive Planning and Assistance Programs sponsored by Social Security.

DOR staff will examine currently provided WIP services and assess whether resources, including staff resources, are available, can be identified, obtained or redirected to expand WIP services, including providing these services earlier in the consumer’s case. Following this examination, the DOR commits to working with the SRC regarding the development or implementation of possible changes to the provision of this important VR service.

Regarding the SRC’s recommendation on providing WIP information to family members, currently, at any meeting with DOR staff, including meetings with Work Incentive Planners, all PE and VR consumers have the right to include family members, other representatives, or advocates. The DOR will ensure that WIPs and other DOR staff know and inform participants and their families and representatives that family members can be and are encouraged to participate.

With respect to online resources, DOR will review currently available online information regarding WIP services and access to and availability of that information to participants. DOR will ensure that online information is in plain-language and consumer-focused, that WIP website materials are accessible to consumers, family members, representatives, stakeholders, and partners, and provides an accurate explanation of DOR WIP services. DOR would appreciate the SRC’s sharing of resources or examples that are representative of what the SRC recommends as potential on-line materials and recorded videos that they feel provide a good overview of and delivers effective work incentive information.

DOR looks forward to future conversations with the SRC on this recommendation and sharing the results of the analysis, steps that have been or will be taken, and potential next steps the DOR will take in support of the delivery of effective and timely WIP services.