

Financial Participation Assessment (34 CFR 361.54)

December 18, 2024

In order to further ICBVI's mission to help clients move towards independence and self-sufficiency, ICBVI encourages clients to be personally invested in and contribute financially towards the cost of their Vocational Rehabilitation (VR) plan services, when possible.

The Financial Participation Assessment (FPA) is a tool used to determine a client's ability to contribute financially to the cost of a service or program being provided by the ICBVI. The extent of the client's participation in the cost of VR services is based on their income, assets, employment status, family size, and expenses related to his or her disability.

The Financial Participation Assessment (FPA) is an effective tool for identifying client resources as they relate to VR planning and implementation, regardless of the amount contributed by the client. Financial participation consideration is not a factor in eligibility determination.

Once eligibility is determined, an FPA will be conducted in conjunction with plan development and the exploration of comparable benefits. An FPA will be reevaluated every twelve months, if the IPE is amended, or if financial circumstances reducing family income changes significantly—whichever occurs sooner.

Upon completion of the FPA and the determination of services to be included in the Individualized Plan for Employment (IPE) the counselor and client will identify the specific IPE services that will be paid for by each party. ICBVI will not be responsible for the client's debts, under any circumstances. If the client's debts to a vendor inhibit the provision of services necessary to achieve the employment goal, ICBVI will work with the client to explore options for the continuation of services.

Services and programs covered by the FPA include education-related expenses such as tuition, training, books and supplies for post-secondary education or vocational training; transportation; maintenance, rehabilitation technology; hearing aids, medical procedures; tools and equipment.

FPA's will be reviewed every 12 months or in the event of a change in a client's income or employment status."

Required Financial Documentation

Client's will be required to provide financial document. The most recent tax return is the preferred document, although a recent pay stub will also be accepted. Counselors will not retain copies of these documents. If a client refuses to provide documentation, the costs of all applicable services on the IPE will be shared with the client.

Determining Client Financial Participation

Several factors are considered to determine a client's level of financial participation, including the client's and/or spouse's income, family size, estimated annual plan costs, exclusions such as impairment-related work expenses, and available financial resources which exceed the Department of Health and Human Services (HHS) Federal Poverty Guidelines.

Exceptions to the FPA policy may be considered by the Rehabilitation Services Chief.

Services Not Subject to Client Financial Participation

The following services are not subject to client financial participation:

- Assessment(s) for determining eligibility and vocational rehabilitation needs.
- Vocational rehabilitation counseling and guidance and referral services.
- Any auxiliary aid or services (e.g., interpreter services or reader services) that an individual with a disability requires in order for the individual to participate in the vocational rehabilitation program. Note: Auxiliary aids and services do not include personally prescribed devices such as eyeglasses, hearing aids, or wheelchairs.
- Personal assistance services.
- Job related services, including job readiness training, job search assistance and placement assistance, Supported Employment job coaching, job supports – short term and youth extended services.
- Pre-employment Transition Services.

SSI/SSDI Exemption

Clients who receive SSI and/or SSDI are exempt from financial contribution for services within the agency's maximum contribution thresholds. However, to ensure a client qualifies for this exemption, proof of SSI or SSDI qualification must be received. Clients who receive Social Security benefits from retirement, spouse of retired worker, child of a retired worker, child of deceased worker, widow, parent of deceased worker, spouse of disabled worker, or child of a disabled worker would not be eligible for this exemption.

Low Income Exemption

Client's, who are low income, are also excluded from the FPA process. Client's must provide evidence of low-income status to be exempt (i.e. TANF documentation, SNAP, WIC, low-income housing verification).