

Financial Participation – What’s New?

- Training services will no longer be Exempt from Financial Participation as of October 1, 2019.
 - **Exception:** If a current case’s IPE or any IPE amendment:
 - Contains training (tuition, books, supplies, fees, tutoring, etc.), AND
 - Is approved by the supervisor, AND
 - Is signed by both the participant and the counselor no later than September 30, 2019.
- Updates to financial participation are no longer required at each annual review. Instead, it must be updated:
 - When the participant discloses a financial change
 - At each IPE amendment
 - ❖ REMEMBER when Non-Exempt services are added to an IPE Amendment, update the “ESTIMATED COST OF NON-EXEMPT SERVICES”.
- Financial Participation Assessment form should be attached to the IPE or IPE amendment.
- Financial Participation for Non-Exempt services will be capped at 80% instead of 100%.
- The first list of individuals with 100% Financial Participation (as of August 31, 2019) was distributed to each Area.
 - Staff should schedule appointments with customers to complete and sign a new Financial Participation form after October 1, 2019.

Exempt Services (covered 100% by VR)*

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| <ol style="list-style-type: none"> 1. Assessment for determining eligibility & vocational rehabilitation needs 2. Vocational rehabilitation counseling & guidance 3. Referral & other services to assist individuals in securing services from other agencies 4. Job-related services including job search & placement assistance 5. Personal assistance services 6. Pre-employment Transition Services | <ol style="list-style-type: none"> 7. Any auxiliary aid (e.g. communication boards, speech synthesizers, telephone handset amplifiers, TDDs) or service (e.g. interpreter services for individuals who are deaf or hard-of-hearing, reader services, communication assistance in the individual’s native language) 8. Supported employment services 9. Trial work services 10. On-the-job training 11. Vehicle Modifications |
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Non-Exempt Services**

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| <ol style="list-style-type: none"> 1. Physical and mental restoration services 2. Maintenance 3. Transportation 4. Services to family members 5. Post-employment services 6. Occupational licenses, tools, equipment, stock and supplies | <ol style="list-style-type: none"> 7. Rehabilitation technology (includes hearing aids) 8. Technical assistance for small business 9. Vocational and other training services (tuition, books, supplies, fees, tutoring) 10. Other goods and services |
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*This is a finite set of services. Any service not listed here is considered a Non-Exempt service.

** These services are broad categories of services.

Note (#9 vocational and other training services) is now considered a Non-Exempt service. (See exception above)