

Overview of Financial Participation Determination Policy

The financial need of individuals will be considered for determining their participation in the cost of vocational rehabilitation services. The financial participation of an individual is determined by the prior year's tax return. All individuals who participate in their vocational rehabilitation services must have a completed the Financial Participation Assessment form.

Individuals Exempt from Financial Participation

Individuals who meet the criteria below for exemption status will not participate in the cost of vocational rehabilitation services.

- Receive SSDI and SSI for his/her disability, or public assistance (TANF, SNAP [Food Stamps] recipients, etc.)
- Annual income less than 285% of the Federal Health and Human Services Poverty Guidelines (See Table A)
- Individuals who were not legally required to file a U.S. Tax Return in the year prior to application. For more information, access the IRS interview tool: <https://www.irs.gov/help/ita/do-i-need-to-file-a-tax-return>.

Exempt Services (Covered 100% by DVR)

- Assessment for determination of eligibility and vocational rehabilitation needs
- Counseling and guidance
- Referral to other agencies
- Job search and placement services
- Personal assistance services
- Any auxiliary aid or services
- Vehicle modification
- Trial work services
- On-the-job training
- Pre-Employment Transition Services
- Supported employment services

Non-Exempt Services

- Physical and Mental Restoration services
- Maintenance
- Transportation
- Services to family members
- Vocational and other training services (tuition, books, supplies, fees)
- Occupational licenses, goods, tools and stock
- Rehabilitation technology
- Technical assistance to develop business
- Post-employment services
- Other goods and services

Impairment Related Work Expenses (IRWEs)

IRWE is the cost of an item or service that is directly related to enabling an individual with a disability to work, and which is incurred by the individual because of a physical or mental impairment.

EXAMPLES of IRWEs

- Personal assistance services
- Prosthetic devices
- Drug and medical services
- Durable medical equipment
- Work equipment and assistants

TABLE A – EXCLUSION TABLE

Based on 285% above the 2021 Federal Health and Human Services Poverty Guidelines, rounded to the nearest whole dollar.

<u>Family Size Allowance</u>	<u>Income Exclusion</u>
1	\$36,708
2	49,647
3	62,586
4	75,525
5	88,464
6	101,403

For each additional person, add: \$12,939

TABLE B – PARTICIPATION TABLE

(Percentage of financial participation in the cost of non-exempt services, based on income after exclusion allowance)

<u>Income After Exclusion Allowance</u>	<u>% of Participation</u>
\$ 100 - \$ 1,999	10%
2,000 - 3,999	15%
4,000 - 5,999	20%
6,000 - 8,499	25%
8,500 - 10,999	30%
11,000 - 13,999	35%
14,000 - 16,999	40%
17,000 - 19,999	50%
20,000 - 24,999	60%
25,000 - 29,999	70%
30,000 - and above	80%

EXAMPLE – FINANCIAL PARTICIPATION ASSESSMENT

(Based on Cost of Non-Exempt Services of \$4,000)

<u>Income</u>	<u>Family Size</u>	<u>Individual Contribution</u>
\$80,000	4	\$ 800 (20%)
\$58,560	2	1,200 (30%)
\$32,340	1	0 (0%)

For Example:

Mr. Smith earned **\$80,000** and has a family size of **4**. His **income exclusion allowance**, according to **TABLE A**, is **\$ 75,525**. Subtract that from **\$80,000**. The result is **\$4,475**, which is his **income after exclusion allowance**.

According to **TABLE B**, this amount of income after exclusion allowance (\$4,475) indicates his percentage of participation is **20%**. If his **planned cost of non-exempt services** are **\$4,000**, his percentage of that is 20%. Therefore, multiply **.20** by **4,000**. This will result in **\$800** of financial participation. This is the amount Mr. Smith would **contribute** to his services.

Mr. Smith’s Earnings	\$ 80,000.00
Subtract TABLE A Amount based on family size of 4	<u>-75,525.00</u>
Applicable Income	\$ 4,475.00
TABLE B - Percentage of Participation based on the Applicable Income	20%
Estimated Planned Non-Exempt Service Cost	\$ 4,000.00
20% of Planned Non-Exempt Service Cost	<u> X .20</u>
Individual’s Financial Participation	\$ 800.00

The Florida Department of Education, Division of Vocational Rehabilitation (VR) is an equal opportunity employer. It is against the law for VR as a recipient of Federal financial assistance to discriminate against any individual in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief. The

application process used by VR to determine eligibility for services, any subsequent services and the entire VR process are subject to these non-discrimination requirements. Auxiliary aids and services are available upon request to individuals with disabilities. VR program receives 78.7 percent of its funding through a grant from the U.S. Department of Education. For the 2021 Federal fiscal year, the total amount of grant funds awarded were \$176,836,896. The remaining 21.3 percent of the costs (\$47,860,557) were funded by Florida State Appropriations. Revised October 2021.