

STATEWIDE



**MASSACHUSETTS REHABILITATION COMMISSION**  
**REHABILITATION COUNCIL**

**Chairperson**

Dawn Clark

**Vice  
Chairperson**

**Secretary**

**Members at Large**

**Policy Committee**

600 Washington Street, 2<sup>nd</sup> Floor

Boston MA 02111

September 5, 2019

11:00 AM to 12:30 PM

**Meeting Minutes**

**Call to Order/Introductions**

- Dawn Clark (SRC), John Bobrowski (MRC), Alex Scarlis (CAP), Inez Canada (SRC), Christopher Dreher (SRC), Naomi Goldberg (SRC)

**Approval of Meeting Minutes**

The meeting minutes from August 1, 2019 were tabled.

**New Business**

**Review of the three Vocational Rehabilitation Policies Financial Documents**

General comments that committee would like to see with all policies:

- consistent language
- hyperlinks to the regulations
- more definitions for clarity
- examples with they would be helpful for clarity

**Below are some questions that were brought up regarding the financial documents before policies were reviewed at this meeting.**

- How much will MRC pay when a client shows Financial Need?
- What vocational rehabilitation services are paid for by MRC?
- What vocational rehabilitation services are not paid for by MRC?
- Why are these services not paid for by MRC?
- Does a consumer need to pay any out of pocket expenses for any services?

## **Review of Financial Need Determination dated Dec. 9, 2008**

- the policy should include examples for of maintenance and transportation services for clarity
- it is not clear in this policy that the CIES vendors are not subject to the financial needs test
- there should be a carveout for auxiliary services
- "change in financial status" should be fleshed out/defined and include examples for clarity
- SSI/SSDI client rights should be more explicitly stated
  - there should be a way to document that a SSI/SSDI client understands that they are not obligated to pay for VR services
  - such clients should also be provided contact information for CAP
    - Alex S. gave an example of such a client whom was pressured into saying that he would pay when he did not have to contribute because he was on SSA benefits.
  - There should also be a statement that client receiving SSA benefits are not obligated to take loans
  - This discussion led to more general comments about standard operating procedure (SOP) with regard to financial need
    - this added language regarding SSI/SSDI clients not being obligated to pay should be a part of general SOP for MRC
    - there should be a defined timeframe for response and consideration when financial assistance is requested

- clients should also be told about the waiver process, their appeal rights, and the availability of CAP for free and confidential assistance
- During the review of this policy, the committee also discussed the waiver process
  - it was recommended that MRC have a written protocol for waivers in an instructional memo
    - it should include the state and federal regulations
    - there should also be a definition of the state regulation language “reasonable contribution”
    - there was a question as to how early waivers and other pertinent information and disclosures can be introduced to a client
      - the consensus was that it should be introduced at the onset of eligibility, but needed to be reinforced throughout the client’s VR service delivery
- the committee noted that there seems to be a disconnect between clients, counselors, policymakers/the MRC Administrative Office (AO)
- the committee noted that MRC should be in Order of Selection (OOS) because there doesn’t seem to be enough support available to sufficiently serve everyone and would it be better to serve fewer people sufficiently than to give everyone a very small amount?
  - the committee speculated on the benefit of not being in OOS
  - may explain why clients are not being told about the waiver
  - Inez C. commented that a college to search for scholarships could alleviate some of the financial burden on MRC
    - could interact with both colleges and high schools to raise awareness regarding services and help available
    - it leads to an informed consumer with access to policies
      - the current state of affairs implies that the waiver should be offered to everyone because MRC is not in OOS

- currently there is no standard practice, each office does it differently and the counselors within each offices decide what they tell clients
- Dawn C. commented that what she is hearing about financial participation, the federal reg requirements, and the waivers is “alarming.”
  - She expressed concern that the SRC could be culpable and she does not want the SRC to be
  - She committed that the Commissioner should be notified of the issues so that the SRC can track MRC’s response
  - She ended with asking how to fix these issues; comments included:
    - using more concrete terms in the policies/no vague terms
    - partnering with the SSA to inform consumers of their VR rights regarding not being obligated to pay
    - it depends on whether the policy committee is able to suggest language or whether we are just offering comments on the policies
    - the waiver should be referred to in the Max Ob the policy where it discusses the responsibilities of VR
      - In response to a question re: what is Max Ob, Max Ob was defined as how much MRC is willing to contribute to the cost of a client’s Education without a client asking for a waiver

As policy committee chair, Naomi commented that she would compile the comments and edits to submit them to MRC.

**Review of Determination of Financial Participation: Annual Dollar Standard, Allowable Cash Assets dated Feb. 2, 2015**

- standard dollar amount should be updated annually per census

- comment was made that it is likely that MRC is still using outdated dollar amounts to determine financial need and thus getting inaccurate calculations
- check CMR references to ensure accuracy; link the CMR as noted above
- use RSA request for comments on how they can better assist SRC to ask for help from the SSA
  - Dawn C. Noted that this was a good idea and suggested Chris D. Write a letter about his idea of SSA collaboration with VR agencies
  - comment was made that maybe this is more in the purview of federal legislation and would need a full SRC vote for action
- clarify/define what is meant by “assets”

### **Review of Financial Aid Information Form and Instructions dated May 9, 2008**

- use simple everyday terms that consumers will understand/be direct
- add language about the availability of CAP
  - comment was made that this is a crucial element of the process that seems to be missing in every financial policy
- it was suggested that turns in a policy not exceed a sixth grade reading level as that is the standard level of most VR consumers
- the committee agreed that the goal is to have financial policies be clear and transparent

### **Other topics of concern that were briefly mentioned during the review of these policies but were not discussed in great detail include:**

- providing a link to the Annual Dollar standard so that it updates automatically as opposed to having a chart in the policy that is stagnant
- how much of this information should be discussed with the consumer upon their Referral to VR
- providing examples for concepts like “Combined Income and Assets”
- Cash assets may need clarity as well

- Higher Education – who pays and how much?
  - Yearly review of finances to determine need and Consumer vs. VR contribution
  - Disclosures re: Student loans
  - What services does the student qualify for through the Disability Services Offices?
    - Schools should provide details of the services
  - Be clear when informing students about financial policies and information in the IPEs
- What does a consumer have to do to qualify for services?
- Make sure student understands the services they are receiving before signing off on their IPE.
- Federal Regulation have to/need to be followed.

#### Next steps re: review of VR policies

- Naomi G. will summarize notes from the committee’s review and email them to Terri W., Kate B., and Theresa C. She will also ask in what format they would like the committee’s comments
- An orientation on the financial policies and procedures will be requested by the committee as it is necessary for the committee to understand MRC’s Standard Operating Procedures and what MRC wants for feedback once the committee reviews the policies.
- Committee will review MRC Eligibility Policies at next meeting
  - Naomi G. reminded the committee of the new Eligibility pilot in the West. She noted that the committee should ask if they are using the policies we are getting ready to review or whether they are using different policies. If the Eligibility Pilot is using different ones, the committee should request those as well.

#### The State Plan Recommendations

**The Policy Committee has been assigned FY2020 State Plan Recommendation #5.** The recommendation was originally assigned to the State Comprehensive Needs Assessment/Consumer Satisfaction Committee. As this recommendation involves policies and procedures for payments for VR services it is best suited for the Policy Committee to address the recommendation.

What can the committee do to achieve the goal of assisting consumers in receiving VR services?

- Consumers receiving inadequate information
  - If a consumer needs services that MRC does not pay for is there any other state agencies that can pay for the consumer's needs?
  - What happens if a consumer agrees to pay for the services but cannot meet the agreement?
  - If a consumer pays for services, will they get reimbursed by MRC?
- Provide more guidance to the consumer.
  - What services exist for the consumer?
- Is there an existing contact person for procurement from MRC?
- How do we tackle this recommendation?
  - Wait on lists promised in Nov
  - After receiving, evaluate what is needed

### **Responses we need from MRC**

Ask for additional information about

- SOP for financial situations where a consumer needs services and there is no MRC vendor.
- Contractors on MRC vendor system
- What types of contracts are still needed?
  - Chris D. suggested that a question be added to the Consumer Needs survey to gauge need
    - When would John B. need survey info/question? Next 2weeks

**The Policy Committee has been assigned FY2020 State Plan Recommendation #7.** The recommendation was originally assigned to the Business & Employment Committee.

- Comment made that students need more than just the information; they should be made to schedule appointments with Disability Services Offices on campus as a part of the steps to complete their IPE goal
  - o Students should also set up appointments with American Student Assistance (ASA)
    - Helps the consumer with how to plan financially for college
    - Is there a contact person at the ASA?
- Ask that brochures regarding colleges are available to all consumers and counselors should distribute them.
- What can the committee do at low cost to get the word out?
  - o Lisa Lou will be back in September; she may be able to assist.

### **Action Steps regarding Recommendations**

- Step 1. Submit outstanding questions to MRC
- Step 2. Receive answers from MRC
- Step 3. Find out who is the contact person at MRC for procurement and college information?

### **Timeline**

The committee will meet monthly to review, submit comments, questions and concerns on the VR Policies.

### **Action Items for the committee to work on**

- Prepare for the next policies review of the eligibility documents
- Prepare your comments; bring them to the next meeting to be discussed
- The committee will spend 30minutes on each document

### **Adjournment: 12:25**

- Next meeting date: October 3, 2019