

REFERRAL INSTRUCTIONS

Dear Referring Counselor or Beneficiary,

In order to ensure you're sending Work Without Limits Benefits Counseling an *appropriate* and *complete* referral (**preferably typed**), please follow the steps below:

- A beneficiary must be actively seeking employment or currently working in order to receive benefits counseling. The exceptions are veterans and transition-aged youth (ages 14 through 25). If you or your client are only thinking about work, call Social Security's Ticket to Work Help Line at 1-866-968-7842 or 1-866-833-2967 (TTY) for general information.
- Complete the *Work Without Limits Benefits Counseling Referral Form* on page 2.
- Read and initial the *WIPA Privacy Statement, Cancellation Policy, and Dispute Resolution Policy* on page 3.
- Complete and sign the *Social Security Consent for Release of Information* form by filling the fields containing asterisks (*) found on the top and bottom sections of the form. **Important:** Do not check any boxes on release forms.
- Upon completion, fax pages 2 through 4 to **(508) 856-6607** or mail them to the following address:

Attn: Stephanie Major
Work Without Limits Benefits Counseling
UMass Medical School 333 South Street
Shrewsbury, MA 01545

If you have any questions, contact Stephanie Major, Work Without Limits Benefits Counseling Intake Specialist, at (508) 856-3815 or at Stephanie.Major@umassmed.edu.

Your cooperation is greatly appreciated, and we look forward to working with you.

Thank you, The Work Without Limits Benefits Counseling Team

Phone: 877-937-9675 | Fax: 508-856-6607 | www.workwithoutlimits.org/benefits-counseling/

REFERRAL FORM

Referring Counselor Information:

Full Name: _____ Agency: _____
Email: _____ Phone: _____ Ext: _____
Address: _____ City: _____ Zip: _____

Beneficiary Information:

First Name: _____ Last Name: _____ Age: _____
Address: _____ Apt: _____ City: _____ Zip: _____
Home Phone: _____ Cell Phone: _____
Email: _____ Best Contact Time: AM PM | Specific Time: _____
 Veteran Transition Age Youth (ages 14 – 25)

Other Main Contact Information (If Applicable):

First Name: _____ Last Name: _____
Home Phone: _____ Cell Phone: _____
Email: _____ Best Contact Time: AM PM | Specific Time: _____

Employment Situation (Required):

Currently Employed/Self-Employed
Gross Monthly Earnings: \$ _____
 Pending job offer, promotion, interview(s)
 Actively seeking employment
 Considering employment

Meeting Preferences & Needs (Check All That Apply):

Coordinate meeting with referring counselor
 Coordinate meeting with other main contact
 Limited English Proficiency (LEP)
 Needs ASL and/or CDI interpreter
 Reasonable Accommodations: _____

Reason for Referral (Check All That Apply):

Quitting due to impact on benefits
 Notice of an overpayment
 Change in pay or weekly hours
 Health insurance issues
 Other: _____

Services & Benefit Information (Check All That Apply):

DDS DMH MCB MCDHH MRC
 SSI SSDI MassHealth Medicare
 Public Housing Food Stamps
 TAFDC EAEDC
 Other: _____

Goals:

Short Term job goal (3-12 months) _____
 Long Term job goal (3-5 years) _____

Additional Remarks: _____

Phone: 1-877-937-9675 • Fax: 508-856-6607

This facsimile is intended only for the use of the named addressee and may contain information that is confidential or privileged. If you are not the intended recipient, or you are not the employee responsible for delivering the facsimile for the intended recipient, you are hereby notified that any dissemination, distribution or copying of this facsimile is strictly prohibited. If you received this facsimile in error, please notify the sender immediately for retrieval or destruction of this information.

WIPA PRIVACY ACT STATEMENT (Abbreviated Version)

Section 1148 of the Social Security Act, as amended, authorizes UMass Medical School's Work Without Limits Benefits Counseling program to collect this information to support the Work Incentives Planning and Assistance (WIPA) program. Furnishing us this information is voluntary. However, failing to provide us with all or part of the requested information may limit your ability to participate in the WIPA program. We will use the information to determine if you qualify for the WIPA program. We may also share your information in accordance with approved routine uses.

If you would like more information detailing how we collect and use your information, your Benefits Counselor can read you the full Privacy Act Statement.

CANCELLATION POLICY

If you need to cancel your appointment, please provide your benefits counselor with 24-hour notice. If cancelled a second time, your benefits counselor will contact the person who referred you to Work Without Limits Benefits Counseling, if applicable and a letter will also be sent to both you and that person. Thank you for your cooperation.

Please Note: At least 48 hours prior to the appointment, the benefits counselor will provide a reminder of the appointment, by either phone, text or email.

DISPUTE RESOLUTION POLICY

The WWL Benefits Counseling Team is committed to providing prompt and professional services. We take all concerns and complaints seriously. In the event an individual or a referral source is dissatisfied with our services, they should follow the 3-Step Dispute Resolution Process listed below, until the matter is resolved.

1. Submit a written complaint or concern to the Director of Work Without Limits.
2. If still dissatisfied, contact the Protection and Advocacy for Beneficiaries of Social Security (PABSS) Program at the Massachusetts Disability Law Center.

Initials: _____

Date: _____

Consent for Release of Information

You must complete all required fields. We will not honor your request unless all required fields are completed. (*Signifies a required field. **Please complete these fields in case we need to contact you about the consent form).

TO: Social Security Administration

*My Full Name	*My Date of Birth (MM/DD/YYYY)	*My Social Security Number
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I authorize the Social Security Administration to release information or records about me to:

*NAME OF PERSON OR ORGANIZATION:	*ADDRESS OF PERSON OR ORGANIZATION:
Work Without Limits Benefits Counseling	333 South Street
UMass Medical School	Shrewsbury, MA 01545

*I want this information released because: _____
We may charge a fee to release information for non-program purposes.
I am planning on going to work and need this information for benefits planning. Please fax a BPQY to Work Without Limits Benefits Counseling at (508) 856-6607

***Please release the following information selected from the list below:
Check at least one box. We will not disclose records unless you include date ranges where applicable.**

- 1. Verification of Social Security Number
- 2. Current monthly Social Security benefit amount
- 3. Current monthly Supplemental Security Income payment amount
- 4. My benefit or payment amounts from date _____ to date _____
- 5. My Medicare entitlement from date _____ to date _____
- 6. Medical records from my claims folder(s) from date _____ to date _____
If you want us to release a minor child's medical records, do not use this form. Instead, contact your local Social Security office.
- 7. Complete medical records from my claims folder(s)
- 8. Other record(s) from my file (We will not honor a request for "any and all records" or "the entire file." You must specify other records; e.g., consultative exams, award/denial notices, benefit applications, appeals, questionnaires, doctor reports, determinations.)
My cash benefits, Health Insurance, Medical review dates. Representation, SSI&SSDI Work Activity and earnings. Benefits Planning Query: All Employment Supports data on SSA record

I am the individual, to whom the requested information or record applies, or the parent or legal guardian of a minor, or the legal guardian of a legally incompetent adult. I declare under penalty of perjury (28 CFR § 16.41(d)(2004) that I have examined all the information on this form and it is true and correct to the best of my knowledge. I understand that anyone who knowingly or willfully seeking or obtaining access to records about another person under false pretenses is punishable by a fine of up to \$5,000. I also understand that I must pay all applicable fees for requesting information for a non-program-related purpose.

*Signature: _____ *Date: _____
 **Address: _____ **Daytime Phone: _____
 Relationship (if not the subject of the record): _____ **Daytime Phone: _____

Witnesses must sign this form ONLY if the above signature is by mark (X). If signed by mark (X), two witnesses to the signing who know the signee must sign below and provide their full addresses. Please print the signee's name next to the mark (X) on the signature line above.

1. Signature of witness	2. Signature of witness
Address(Number and street, City, State, and Zip Code)	Address(Number and street, City, State, and Zip Code)