### Possible college funding options for families (based on individual’s needs)  
**DRAFT**

<table>
<thead>
<tr>
<th>Source</th>
<th>Who is eligible</th>
<th>Tuition Program fees</th>
<th>Assistive tech</th>
<th>Books</th>
<th>Educational coaching</th>
<th>Transportatio n</th>
<th>Room/board</th>
<th>Housing support</th>
<th>Personal care</th>
<th>Support at internship or work experience</th>
<th>Support at paid work</th>
<th>Support at paid summer work</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>DPI IDEA funds</td>
<td>Transition age youth 17-21 in a transitional program on a college campus</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>YES, if related service is in IEP</td>
<td>Possible, yes if is in IEP</td>
<td>No</td>
<td>No</td>
<td>Yes, if related service is in IEP</td>
<td>Yes, if specified in IEP</td>
<td>Yes, if specified in IEP</td>
<td>If qualifies for ESY and is in IEP</td>
<td>All funding decisions must be made at the IEP team meeting with LEA Rep with funding authority present.</td>
</tr>
<tr>
<td>DVR</td>
<td>Must meet DVR eligibility criteria.</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible Training grant - Up to ($5,000/yr)</td>
<td>Possible Training grant Up to ($5,000/yr)</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
</tr>
<tr>
<td>DHS: CLTS</td>
<td>Up to age 22</td>
<td>NO</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>No</td>
<td>Possible after Medicaid Card service</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
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<tr>
<td>DHS: Family Care</td>
<td>Age 18 and older</td>
<td>NO</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
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<td>Possible</td>
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<tr>
<td>DHS: IRIS</td>
<td>Age 18 and older</td>
<td>NO</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
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<tr>
<td>DHS: Legacy Waiver</td>
<td>Age 18 and older OR after exit high school age 22</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>No</td>
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<tr>
<td>SSI: PASS</td>
<td>SSI recipients &amp; SSDI beneficiaries may be eligible for PASS plan IRWE</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Federal financial aid*</td>
<td>See Below</td>
<td>YES</td>
<td>YES</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
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<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
<td>Possible</td>
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<tr>
<td>Scholarships</td>
<td>All</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
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<td>YES</td>
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<tr>
<td>Private pay</td>
<td>All</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>
Additional Information

*Federal Financial Aid

Requirements:
A) For students who graduate from high school and receive a regular diploma
   • Must complete the FAFSA
   • Must demonstrate financial need (student and family):
     Pell grant: maximum amount $5645 http://www.massresources.org/pell-grant.html
     • Must be degree-seeking

B) For students who have exited from high school with a certificate and not a regular diploma
   • Must attend an approved CTP (Comprehensive Transition Program). CTP status is achieved after a college program for students with disabilities submits an application and shows that it fulfills specific criteria such as having internships, peer mentors, offering classes where students with disabilities are with students without disabilities for a percentage of the time, etc. For a list of post-secondary education programs that have CTP status go to https://studentaid.ed.gov/eligibility/intellectual-disabilities#illinois
   • Must complete the FAFSA
   • Must demonstrate financial need (student and family)

SSI: Supplemental Security Income – a United States government program that provides stipends to low-income people who are either aged (65 or older), blind, or have a disability. www.ssa.gov/ssi/.

SSDI: Social Security Disability Insurance is a federal insurance program that protects workers who become totally disabled and cannot work for a year or more. The program is administered by the Social Security Administration (SSA). www.ssa.gov/dibplan/dqualify.htm

Available funding sources or savings options for those who receive SSI or SSDI http://www.ssa.gov/ssi/spotlights/spot-student-earned-income.htm:
   a) PASS (Plans for Achieving Self-Support). A plan to achieve self-support is a way in which a person with a disability or blindness uses or sets aside income or resources to reach a work goal. http://www.socialsecurity.gov/ssi/spotlights/spot-plans-self-support.htm
   http://www.socialsecurity.gov/disabilityresearch/wi/pass.htm
   b) IRWE (Impairment Related Work Experiences) http://www.socialsecurity.gov/ssi/spotlights/spot-work-expenses.htm In most cases, out-of-pocket costs of impairment-related work expenses (IRWE), such as medicine, medical supplies, medical devices, service animals, and disposable items such as bandages and syringes can be deducted from the amount of earnings used to figure earned income. http://www.socialsecurity.gov/ssi/spotlights/spot-work-expenses.htm
   http://www.socialsecurity.gov/ssi/spotlights/spot-impairment-relatedwork.htm

Work study: http://studentaid.ed.gov/types/work-study. A few states have enacted policy allowing students who attend a CTP to participate in work study.
Income Tax Deduction

http://www.tacanow.org/family-resources/tax-strategies-for-parents-of-kids-with-special-needs/
Regs. Sec. 1.213-1(e)(1)(v),
Regs. Sec. 1.213-1(e)(1)(v)(a); Letter Ruling 200729019; Sims, T.C. Memo. 1979-499; and Rev. Rul. 70-285

1. Tuition and room and board charges may be tax deductible if the program or initiative is for students with disabilities, and if the purpose of the program is for training.
2. Helpful documentation: Anything that shows that the facility has a therapist (speech, psychology, physical), or other medical professionals available. Additional information explaining the intent of the program.
Regs. Sec. 1.213-1(e)(1)(v),
Regs. Sec. 1.213-1(e)(1)(v)(a); Letter Ruling 200729019; Sims, T.C. Memo. 1979-499; and Rev. Rul. 70-285

Personal Savings Account (ABLE Act)


The intent of the ABLE act is to allow individuals with a disability to create a tax-free savings account to cover expenses such as education, housing, and transportation that will not affect eligibility for public benefits such as SSI, Medicaid, and other public benefits. Rules and regulations still need to be determined, and each state will have its own version of the savings account. The accounts will not be available for several years. In the meantime Special Needs Trusts or Pooled and Community Income Trusts http://www.wispact.org/ are available for individuals with disabilities.
All funding is based on the individual’s needs and is determined in collaboration with agency representatives working with that individual. An individual who is eligible for DVR services with an approved IPE goal that requires a college certificate or degree, may receive financial support from DVR. The consumer and counselor together should determine what training (individual classes, certificate, degree, etc.) and/or skills the individual needs to achieve his/her Individualized Plan for Employment (IPE) goal. After that has been identified, the counselor and consumer can then determine the appropriate provider of those services to meet the consumer’s need at the least cost to the agency. DVR would only fund courses/training needed to achieve the IPE goal. Examples of training can include temporary work or academic courses leading to an employment outcome.

DVR staff should determine if there are comparable services or other sources locally that would meet the consumer’s IPE needs at a lower cost. Examples of a lower cost service can include services at a job center, independent living center, or community agency.

For approved training that is Financial Aid eligible, consumers need to follow the process for the DVR Training Grant to determine funding for the program (http://dwd.wisconsin.gov/dvr/trg_grant/default.htm#related). For approved training that is not Financial Aid eligible, the DVR Non-Financial Aid process is followed to determine funding.
Definitions

ID

As defined by the Higher Education Opportunity Act (HEOA) (2008; amended in 2010), Title VII, Part D, Section 760. A student:

- With a cognitive impairment, characterized by significant limitations in
  (i) intellectual and cognitive functioning; and (ii) adaptive behavior as expressed in conceptual, social, and practical adaptive skills; and
- Who is currently, or was formerly, eligible for a free appropriate public education under the Individuals with Disabilities Education Act. (IDEA)

HEOA

Higher Education Opportunity Act: Higher Education Opportunity Act: The Higher Education Opportunity Act (HEOA) (PL 110-315) was enacted on August 14, 2008, reauthorizing the Higher Education Act (HEA) of 1965. This law contains a number of important new provisions that improve access to postsecondary education for students with intellectual disabilities.

DPI

Department of Public Instruction – the state agency that oversees all public school districts.

IDEA

Individuals with Disabilities Education Act: If agreed upon by the Individual Education Plan (IEP) team, a transition-aged student receiving special education services may be able to take college course(s) while receiving support from public school staff. The district may pay the tuition and may provide assistive technology, transportation, and adult support.

DVR

Department of Vocational Rehabilitation – The agency that may assist an individual in preparing for, securing, retaining or regaining an employment outcome. The individual works with a counselor to develop an Individual Plan for Employment (IPE) with employment goals that take into consideration the strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice of that person. (http://dwd.wisconsin.gov/dvr/info_ctr/services/default.htm)

DHS

Department of Health Services – The state governmental agency responsible for maintaining public health. It administers a wide range of services to clients and supervises and consults with local public and private providers. The Division of Long-Term Care (DLTC) in the DHS is generally responsible for the state’s programs for persons with developmental disabilities. If an adult individual qualifies for long-term care supports provided by the county, those supports will be provided in one of 3 different ways, depending on the county. A good explanation of DHS services can be found at this link: (http://legis.wisconsin.gov/lfb/publications/Informational-Papers/Documents/2013/49_services%20for%20persons%20with%20developmental%20disabilities.pdf) and http://www.dhs.wisconsin.gov/sds/.
Here are the 3 ways Wisconsin counties administer support to their adult residents who qualify:

1) **IRIS:** Include, Respect, I-Self Direct. This is a Self-Directed Supports Program for older people and adults with disabilities, available in all Family Care Counties; it is a fee for service alternative to Family Care. The waiver is administered in such a way that participants have greater control over how services are received; they may self-direct and manage a designated budget amount.
   - **SSP** Support and Service Plan (IRIS) – Each IRIS recipient needs an SSP.

2) **Family Care:** It is also a Self-Directed Supports Program for older people and adults with disabilities. Family Care was developed to be a comprehensive long-term care program to improve the quality of long term care services individuals receive, provide individuals with more choices and greater access to services. It has 2 components: Aging and Disability Resource Centers (ADRC) and Managed Care Organizations (MCO).
   - **MCP** Member Centered Plan (Family Care) – Each Family Care recipient needs an MCP.

3) **Legacy Waiver:** CIP (Community Integration Program) MA Waiver, funding for relocation from institution to community and COP (Community Options Program) – available in non-Family Care counties and designed to provide similar services to Family Care and IRIS.

For children, there is a federal waiver that is available to qualifying individuals in all WI counties:

**CLTS:** The Children's Long-Term Support Home and Community-Based Medicaid Waivers (CLTS Waivers) provide a structure within which Medicaid funding is available to support children who are living at home or in the community and who have physical, sensory, or developmental disabilities and severe emotional disturbance. They must meet the functional criteria of the Katie Beckett program.
   - **ISP** Individual Service Plan – A family works with a case manager to develop an ISP.