**Section 562.30 Financial Analysis Completion**

a) The following factors will be considered in completing the Financial Analysis:

1) No Financial Analysis shall be completed for a customer who has been determined eligible for Social Security benefits, based on their own disability, under Title II or Title XVI of the Social Security Act consistent with 34 CFR 361.54(b)(3)(ii).

2) Unless the services provided to the customer are exempt from financial participation as listed in subsection (b), all customers seeking services through DHS-DRS must complete the Financial Analysis pursuant to 89 Ill. Adm. Code 562.40 and participate in the cost of services, as indicated by the Financial Analysis. The level of the customer's participation in non-exempt services shall be determined by the Financial Analysis.

3) In completing the customer's Financial Analysis, the customer's income shall be calculated based on proof of income provided pursuant to 89 Ill. Adm. Code 562.40.

b) Customer financial participation shall be required for all services except the following services as identified, in part, by 34 CFR 361.54(b)(3):

1) Counseling and guidance, information, and referral (34 CFR 361.48(b)(3) and (b)(4));

2) Evaluation and assessment services and associated costs, including, but not limited to, room, board, and transportation (34 CFR 361.48(b)(1) and 361.42(e));

3) Services or instruction provided directly by DHS-DRS staff or in a DHS-DRS-managed facility (see 89 Ill. Adm. Code 750.40: Responsibility of State Schools);

4) Assessment, placement, customized employment, and supported employment through any approved community rehabilitation program (see 89 Ill. Adm. Code 530, 34 CFR 361.5(c)(54));

5) Pre-employment transition services for students and youth with disabilities, as defined in 89 Ill. Adm. Code 521, which facilitate transition from school to postsecondary life, such as achievement of an employment outcome in competitive, integrated employment;

6) Technical assistance and other consultation services to conduct market analysis, develop business plans, and otherwise provide resources to eligible individuals who are pursuing self-employment or establishing a small business operation as an employment outcome;

7) Job-related services, including job search and placement assistance, job retention services, on-the-job training (OJT), follow-up services, and follow along services, including job coaching and post-employment services (34 CFR 361.48(b)(12));

8) Auxiliary services (defined in 89 Ill. Adm. Code 521), including interpreting services, reader services, rehabilitation teaching services, and orientation and mobility services;

9) Rehabilitation technology, as defined in 89 Ill. Adm. Code 521, including vehicular modification, telecommunications, sensory, and other technological aids and devices;

10) Personal assistance services pursuant to 34 CFR 361.48(b)(14): Scope of Vocational Rehabilitation Services for Individuals with Disabilities;

11) All costs directly related to the customer's attendance and participation in training and related services as described in 89 Ill. Adm. Code 590, Subpart C; and

12) All costs directly related to the customer's attendance and participation in programs specifically offered for disability-related skills training, such as orientation and mobility; rehabilitation teaching; training in the use of low vision aids; braille; speech reading; sign language; and cognitive training/retraining.

c) In exceptional circumstances, the Director of DHS-DRS may expand the list of exempt services to address individual needs and employment goals (34 CFR 361.50(c)(2)(ii)), so long as the exemption is applied to all individuals in similar circumstances, regardless of geography. Such exemptions could include, but are not limited to:

1) Adjusting qualifying exempt services based on budgetary constraints or influx;

2) Responding to states of emergency or other environmental impacts, and

3) Adjusting to labor market and/or workforce needs.

(Source: Amended at 48 Ill. Reg. 15485, effective October 21, 2024)