Partnership Plus: Focusing on Post-Employment Needs of Social Security Beneficiaries with Disabilities

Choose Work Webinar Series
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Presenters

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Goals of Webinar

• Provide overview of Ticket to Work program & Partnership Plus
• Emphasize VR counselor’s role in a successful Partnership Plus handoff
• Explore similarities/difference in Cost Reimbursement and Ticket program
• Introduce partner programs, key support services and relevant resources
Two SSA programs provide financial compensation for successfully serving individuals receiving disability benefits under the Social Security Disability Insurance (SSDI) program and the Supplemental Security Income Program (SSI)

• **Cost Reimbursement** (Authorized in 1981)
  > Only available to SVRAs

• **Ticket to Work program** (Authorized in 1999)
  > Available to both SVRAs and approved Employment Networks (ENs)
• **Cost Reimbursement:** Makes VR services more readily available to beneficiaries with disabilities

• **Ticket to Work:** Expands choices available to beneficiaries interested in entering, maintaining or advancing in employment

• **Both are outcome-based programs intended to**
  > Reduce/eliminate reliance on Social Security disability benefits, resulting in savings to the Social Security Trust Fund (SSDI) and the General Revenue Fund (SSI)
  > Increase self-sufficiency and improve quality of life for beneficiaries
Different Standards for Payment

**Cost Reimbursement**

- SVRA submits for a lump sum payment when beneficiary achieves 9 continuous months of earnings within a 12-month period above the level SSA considers Substantial Gainful Activity (after applicable deductions).

**Ticket to Work**

- ENs request payments when Ticket Holders achieve designated levels of work and earnings as they progress towards self-supporting employment.
  > Payments made based on milestones and outcomes beneficiaries achieve associated with work and earnings after Ticket assignment and after job placement.
  > Not reimbursement for the cost of services provided.

Support for Americans with disabilities who want to work
What Are ENs?

Private (for profit & non-profit) organizations, government agencies, educational entities, employers, and other types of service providers that are willing and qualified to assist Ticket Holders to enter and maintain employment

- Can be a single entity, two entities forming a partnership, or a coalition of organizations functioning as a single EN
- SVRAs are automatically qualified to be ENs and do not have to complete the EN RFP to participate
SVRAs and ENs

SVRAs provide services based on the Scope of Services outlined in the Rehabilitation Act and as spelled out in VR State Plan.

Other types of ENs choose what services they provide:
- SSA does not require an EN to provide any specific services.
- Services to be provided are listed in EN’s application to SSA and on the EN Directory listed on the MAXIMUS website.
  > www.yourtickettowork.com

EN services, like VR services, are individualized:
- EN and Ticket Holder negotiate an Individualized Work Plan (IWP).
- IPE serves as IWP for SVRAs.
People receiving SSI/SSDI are presumptively eligible for VR services

- Must be interested in work
- Must meet priority for services if a SVRA is operating under an Order of Selection

Other types of ENs can refuse a Ticket assignment

- Goal: Find a good match between services/supports Ticket Holder needs to achieve his/her employment goal and service/supports offered by EN
- Even after the IWP is signed, the EN or the Ticket Holder can terminate the relationship by asking MAXIMUS to un-assign the Ticket
What Do Beneficiaries Need to Know?

- Ticket program is voluntary & free
- Medicare & Medicaid can continue
- Beneficiaries get to choose
  > Whether/When to use the Ticket
  > What services/supports to seek
  > Where to seek assistance
    -- State VR agency
    -- An approved EN
A paper Ticket is mailed when SSDI or SSI benefits are approved

- Individuals already on disability benefits received Tickets in the past
- Paper Ticket is not needed to participate
A Ticket is considered “in-use” if it is:

- “Assigned” to an EN or a State VR agency functioning as an EN
  > Beneficiary and EN negotiate an IWP which is submitted to MAXIMUS for approval -- Approval triggers Ticket assignment to that EN
  > VR counselor and beneficiary negotiate an IPE and a signed SSA 1365 is submitted to MAXIMUS to trigger Ticket assignment
  > To change the status of a Ticket after being assigned, beneficiary must submit request to MAXIMUS in writing

- “In-Use SVR” (applies to VR CR cases only)
  > Extends medical CDR protection to beneficiaries served under CR
  > Status is triggered when beneficiary signs IPE and SVRA notifies MAXIMUS via electronic data transfer file
  > Ticket cannot be assigned to an EN while VR CR case is open
  > If beneficiary wants to assign Ticket to an EN other than VR, VR counselor and beneficiary need to discuss VR closing the case
Beneficiary, SVRA representative or EN can contact MAXIMUS to determine Ticket eligibility and whether a beneficiary’s Ticket is available for assignment

- Requires beneficiary’s name and SSN
- Call MAXIMUS at 866-968-7842 (v) or 866-833-2967 (tty)
How Do Ticket Holders Find ENs?

A Ticket Holder can

• Learn about ENs in the area by visiting: www.yourtickettowork.com or calling MAXIMUS at (866)968-7842 (voice); (866)833-2967 (tty)

• Discuss his/her employment goal and the services and supports needed to achieve that goal with several ENs before assigning the Ticket
Benefits to Beneficiaries

Participation in the Ticket program has benefits for the beneficiary:

- **Safety Net**: If beneficiary stops working within 5 years of benefit cessation, there is an expedited reinstatement of benefits ([www.socialsecurity.gov/redbook/](http://www.socialsecurity.gov/redbook/))

- **Postponing Medical CDRs**: If a beneficiary is using his/her Ticket and making timely progress towards his/her employment goals, regularly scheduled medical Continuing Disability Reviews (CDRs) will be postponed.
What Is a Medical CDR?

Medical CDRs are periodic reviews SSA conducts to determine continued eligibility for disability benefits based on a beneficiary’s medical or disabling condition.

- Conducted every year, 3 years or 7 years, depending on the expectation of medical recovery.
- A CDR may result in the loss of benefits if substantial evidence shows medical recovery.
Timely Progress Reviews (TPRs)

Beneficiaries are expected to progress toward self-supporting employment while the Ticket is assigned or “in-use SVR”

- TPR is based on Timely Progress Guidelines established by SSA under new Ticket regulations
- Both educational attainment and work/earnings count as progress in new regulations

- September 2009 - SSA began sending advanced notices of reviews to occur one year later (i.e., for Tickets assigned or “in-use SVR” prior to September 2009

Failure to demonstrate timely progress does not end Ticket use, just the beneficiary’s protection against a medical CDR
SVRAs Have Choices!

Ticket legislation gave SVRAs the choice, on a case by case basis, of serving Social Security beneficiaries with disabilities

- Under the CR program
- or
- Functioning as an EN under the Ticket Program

Under the new Ticket regulations, this choice has important implications
New Opportunities for VR/EN Partnerships

• **Prior Ticket regulations:** SSA paid for a beneficiary’s success under either the CR or Ticket program, NOT BOTH

• **New Ticket regulations** (effective July 2008): VR CR payments and EN milestone and outcome payments both possible on behalf of the same Ticket Holder for the same Ticket in certain circumstances
  > CR cases only
  > Payments based on provision of sequential, not concurrent, services
  > Referred to as “Partnership Plus”
Partnership Plus

- Promotes collaboration rather than competition

- Provides beneficiaries access to VR for upfront services & ENs for ongoing support services

- Success depends on beneficiaries understanding options under Ticket program after VR case closure (informed choice)
What Does This Mean?

• When VR serves a Ticket Holder under CR, Ticket still has value when taken to an EN after VR case closure

• Beneficiary has option of assigning Ticket to an EN to receive

  Ongoing support services  Job coaching
  Benefits planning  Job retention services
  Skill building  Transportation
  Additional Education/Training  Mentoring
  Other services/supports to maintain/advance in employment
Partnership Plus and Phase 1 Milestone Payments

When a beneficiary’s VR CR case is closed successfully (person is employed), the Phase 1 milestones are not available to the EN that subsequently gets the Ticket assignment

- Ticket payments are based on work-related milestones and outcomes occurring after Ticket assignment and after job placement
- VR provided services leading to initial efforts at self-supporting employment
- Level of employment at case closure (hours, earnings) does not matter
How Does Partnership Plus Work?

When VR opens case & chooses the CR option

- SVRA notifies MAXIMUS (via electronic data file) of beneficiary’s SSN and IPE signature date
- MAXIMUS sends an electronic file back to SVRA identifying
  - SSNs that are not beneficiaries
  - SSNs who have Tickets already assigned
  - SSNs with Tickets available for assignment
- MAXIMUS moves assignable Tickets to “in-use SVR” status
When VR closes a CR case, VR notifies MAXIMUS (via electronic file) of the case closure

• Notification must include same information as original notification plus
  > Date case was closed
  > Employment status at case closure
    -- Determines availability of Phase 1 milestones for EN subsequently getting Ticket assignment
  > MAXIMUS places beneficiary’s name back on list of beneficiaries with Tickets available for assignment
There is an inherent delay in the posting of a beneficiary’s name back on the list of beneficiaries with Tickets available for assignment

- SVRA closes cases throughout the month
- SVRAs submit data files to MAXIMUS once a month
- MAXIMUS must load data in their system

Beneficiary or EN can use other evidence of VR case closure to facilitate Ticket assignment to an EN

- VR case closure letter
- EN Referral form
How Partnership Plus Works

Beneficiary goes to VR & applies for services.

Beneficiary & VR develop IPE for Cost Reimbursement case. VR notifies MAXIMUS to place Ticket into “In-Use SVR” status.

VR provides services as outlined in IPE. [VR may purchase services from vendors who are approved ENs]

VR closes case & notifies MAXIMUS after beneficiary has been stabilized in employment for at least 90 days.

EN provides services as outlined in IWP to assist beneficiary in maintaining employment.

EN & beneficiary develop IWP that is sent to MAXIMUS for approval which triggers Ticket assignment to that EN.

Beneficiary connects with EN to discuss need for ongoing support services.

At case closure, VR counselor advises beneficiary of option of assigning Ticket to an EN for ongoing support services.

EN submits for Phase 2 Milestone payments based on beneficiary attaining SGA level earnings.

Beneficiary & EN continue working together. EN submits for Outcome payments when disability checks stop.

VR submits CR claim when beneficiary earns above SGA for 9 months within a 12 month period.

VR and EN get PAID! Beneficiary increases his/her self-sufficiency! Everybody WINS!

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After you become an Employment Network, you should notify your local VR agency and discuss working together.

That’s what Partnership Plus is all about...
Most Common Partnership Plus Models

Diagram:
- VR to EN
- VR to Employer/EN
- EN to VR to EN

Support for Americans with disabilities who want to work
VR Agencies Can Still Function as ENs

On a case-by-case basis, a VR agency can still choose to serve a beneficiary as an EN under the Ticket program

- SSA 1365 must be signed by the beneficiary and submitted to MAXIMUS for SVRA to secure Ticket assignment

- SVRA will be compensated under its elected EN payment system (Outcome or Milestone/Outcome)
Administrative decisions about VR’s participation in CR vs. the Ticket program and administrative processes associated with securing compensation from SSA for successfully serving beneficiaries are usually made at SVRA management level.

- **Choice between CR & functioning as an EN**
  - Made by either CR/Ticket Coordinator or VR counselor with guidance from state office
  - Two common approaches to cost modeling
    - Likelihood beneficiary will attain 9 months of earnings above SGA
    - Projected cost of services/supports to facilitate beneficiary success
Partnership Plus: Role of the VR Counselor
The success of Partnership Plus depends on VR counselors helping beneficiaries understand their options after VR case closure.
Partnership Plus: Benefits to VR Counselors

- Provides a new option for assisting beneficiaries to retain and advance in employment after VR closes the case

- Many beneficiaries will achieve 9 months of earnings above SGA with assistance from an EN
  - VR is not designed to provide long-term supports after job placement
  - Most VR agencies close cases when consumers are stabilized in employment for 90 days
Benefits to VR Counselors
(Continued)

• Provides an alternative for beneficiaries who are being wait-listed based on an Order of Selection

• Reduces the need for re-opening cases when beneficiaries need additional assistance after case closure

• Provides another option for beneficiaries whose VR cases are closed unsuccessfully
Information on a beneficiary’s options under the Ticket program should be a part of every case closure discussion

- An aspect of “informed choice”

- Offers beneficiary an alternative for obtaining additional services and supports after VR case closure
Options for facilitating informed choice about selecting an EN after VR case closure

• Refer beneficiaries to the MAXIMUS web site for a list of approved ENs:  www.yourtickettowork.com
• Provide beneficiaries with a list of approved ENs serving the area
• Provide beneficiaries with a list of ENs that offer the specific services the beneficiary needs
• Refer a beneficiary back to an EN that provided services to him/her under a VR vendor agreement while the VR case was open
If beneficiary assigns his/her Ticket to an EN within 90 days of VR case closure, the protection against a medical CDR will continue uninterrupted.

- Beneficiary can assign Ticket after 90 days, but CDR protection ends at 90 days.
- If SSA initiates a medical CDR prior to Ticket being assigned to an EN (i.e., after 90 day grace period), SSA will complete the CDR.
A variety of Partnership Plus models are emerging

- Most VR agencies are serving all beneficiaries under CR
- A few VR agencies have small pilot projects where VR functions as an EN for certain populations (e.g., SE, MH)
- A few VR agencies are partnering with CRPs to function as a single EN
- To address the loss of Phase 1 Milestone payments, a few VR agencies are
  > Purchasing needed post-employment services from ENs that are VR vendors (services added to IPE based on discussion of post-employment needs)
  > Providing short-term job retention payments to VR vendor/ENs that assist beneficiaries to retain or advance in employment (e.g., case closed below SGA and EN helped beneficiary achieve several months of SGA level earnings)
When Is an Agreement Needed?

A written agreement is not always needed!

State VR agencies and ENs should enter into written agreements when:

• An EN is referring Ticket Holders to VR and keeping the Ticket assignments: Only time an agreement is “required” in Ticket regulations
• Creating a coordinated system of services that includes structured referrals
• Information on beneficiary service needs, earnings, etc. will be shared
• Revenue obtained through EN payments will be shared
• VR is purchasing post-employment or job retention services from an EN as identified in IPE
Partnership Plus: Benefits to the Beneficiary

- Individualized, sequential services
- Coordinated system of services with increased access to job retention services and other types of ongoing supports beneficiaries often need to retain and advance in employment
Partnership Plus: Benefits to ENs

• For most ENs, Ticket payments are unrestricted funds that can be used to
  > Support/expand the infrastructure of service providers in the state
  > Fill in gaps in services

• Does not interfere with EN providing services under a vendor agreement and later functioning as an EN for the same Ticket Holder
Partnership Plus: Benefits to VR

• Reduction in paperwork – Submission of SSA 1365 no longer needed for CR cases

• Increases choices for consumers to access services and supports needed to retain and advance in employment

• Ability to focus on long-term competitive employment
Benefits to All

• Emphasizes interagency collaboration and communication

• Potential to strengthen all partners in the system
  > Increases CR payments to VR agency
  > Increases milestone and outcome payments to ENs
More Information

Check out the online Partnership Plus Toolkit at

http://PartnershipPlus.cessi.net
Beneficiary Resources
Work Incentives Planning and Assistance (WIPA)

SSA approved organizations that assist beneficiaries in making informed choices about work

WIPA staff:
• Are trained to provide information about work and work incentives.
• Can answer questions about how work will affect a beneficiary’s federal, state and local benefits.
• Can help beneficiaries find resources and services to achieve their employment goals.

WIPA services are free

Find the WIPA in your area at: [www.ssa.gov/work/WIPA.html](http://www.ssa.gov/work/WIPA.html)
What Are WISE?

Work Incentives Seminar Events (WISE) are sponsored by local WIPAs in partnership with CESSI, the Program Manager for Recruitment and Outreach for the Ticket program.

At a WISE, motivated beneficiaries are invited to:

- Learn about the Ticket program and other SSA work incentives
- Meet with representatives of:
  - ENs
  - The State VR agency
  - The local WIPA project
  - The State P&A system
  - SSA (local offices and AWICs)
  - Other beneficiaries who want to go to work
  - Other state agencies and community partners

To learn when a WISE event is happening in your area, visit [www.cessi.net/WISE](http://www.cessi.net/WISE), or call 1-877-743-8237.
Choose Work Web Site


Choose Work through the *Ticket to Work* program, offering people with disabilities* a shot at achieving financial independence by enabling more choice in employment-related support services, and access to meaningful work.

Support for Americans with disabilities who want to work
- Facebook
- Twitter
- LinkedIn
- eNews
Learn More about the Ticket Program

Check out Ticket to Work archived webinars on Cornell’s website:
http://www.ilr.cornell.edu/edi/m-cessi-webinars.cfm

• One Stops in Action: Live Demonstration of Effective Practices (5/10)
• Ticket to Work: Beneficiaries Need You! (4/10)
• Ticket to Work Webinar: WISE - Work Incentives Seminar Event (3/10)
• Ticket to Work Webinar: Increasing Employment Network Participation (3/10)
• Ticket to Work for Universities/Higher Education: "Reaching Higher, Strengthening Abilities" (10/09)
• Service Providers as Employment Networks (7/09)
• EN Application Walkthrough (6/09)
• Ticket to Work 201 (4/09)
• Ticket Tools to Support You as an Employment Network (2/09)
(Note: Additional webinars are posted as they occur.)
Alphabet Soup

- SSA – Social Security Administration
- SSI – Supplemental Security Income
- SSDI – Social Security Disability Insurance
- EN – Employment Network
- CR – Cost Reimbursement
- SVRA – State Vocational Rehabilitation agency
- IPE – Individualized Plan for Employment (VR)
- IWP – Individual Work Plan (EN)
- CDR – Continuing Disability Reviews (medical)
- TPR – Timely Progress Review
- MAXIMUS – Operations Support Manager
- CESSI – Program Manager for Recruitment & Outreach
For more information on the Ticket to Work program, visit:

- SSA’s Work Site: www.socialsecurity.gov/work
- The Choose Work site:  http://www.choosework.net
- CESSI’s website:  www.cessi.net/ttw
- MAXIMUS’ Ticket to Work website:  www.yourtickettowork.com

Or, call MAXIMUS at:  1-866-949-ENVR (3687)