Ticket to Work and Partnership Plus: Assisting Beneficiaries with Disabilities to Achieve Long-Term Employment

August 23, 2010
Support for Americans with disabilities who want to work

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Support for Americans with disabilities who want to work
Presenters

• Dan O’Brien, Office of Employment Support Programs, SSA
• Sallie Rhodes, CESSI, Program Manager for Recruitment & Outreach
• David Lin and Patty Isola, Palm Beach Habilitation Center, Inc.
• Beverly Vinson, Preferred Alternatives, Inc.
• Tammy Liddicoat, Employment Resources, Inc.
• Barbara Butz, Daniels and Associates, LLC, CESSI Consultant
Dan O’Brien
Acting Associate Commissioner,
Office of Employment Support Programs
Social Security Administration
• We reconfigured the Ticket program in July 2008
• Included Partnership Plus option that allows VR to hand off to EN for ongoing support after closure
• Since 2008, we have seen strong positive trends in spite of the poor economy
• The Ticket program is on the right track and we expect exponential improvements as the economy improves
All data shows strong positive trends since the new Ticket regulations were published in May 2008

<table>
<thead>
<tr>
<th>Category</th>
<th>5/1/08</th>
<th>8/1/10</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tickets assigned to ENs</td>
<td>13,631</td>
<td>30,832 (+126%)</td>
<td></td>
</tr>
<tr>
<td># ENs with Tickets assigned</td>
<td>646</td>
<td>913 (+41%)</td>
<td></td>
</tr>
<tr>
<td># of Tickets generating payments</td>
<td>4,034</td>
<td>10,558 (+162%)</td>
<td></td>
</tr>
<tr>
<td># beneficiaries w/benefits suspended or left rolls due to work/earnings</td>
<td>2,071</td>
<td>3,605 (+74%)</td>
<td></td>
</tr>
<tr>
<td># months disability benefits not paid due to work/earnings (i.e., outcome payments)</td>
<td>30,201</td>
<td>66,980 (+122%)</td>
<td></td>
</tr>
</tbody>
</table>
EN payment data shows strong positive trends too!

<table>
<thead>
<tr>
<th></th>
<th>5/1/08</th>
<th>8/1/10</th>
</tr>
</thead>
<tbody>
<tr>
<td># ENs received payment</td>
<td>411</td>
<td>766 (+86%)</td>
</tr>
<tr>
<td># Milestone pymts made to ENs</td>
<td>6,807</td>
<td>23,825 (+250%)</td>
</tr>
<tr>
<td># Outcome pymts made to ENs</td>
<td>30,201</td>
<td>66,980 (+122%)</td>
</tr>
<tr>
<td>$ Milestone pymts made to ENs</td>
<td>$12.7 mil</td>
<td>$43.1 mil (+395%)</td>
</tr>
<tr>
<td>$ Outcome pymts made to ENs</td>
<td>$8.7 mil</td>
<td>$23.3 mil (+168%)</td>
</tr>
</tbody>
</table>
Sallie Rhodes
Ticket to Work Program Specialist
CESSI, A Division of Axiom
Program Manager for Recruitment & Outreach
Two programs provide financial compensation for successfully serving people receiving disability benefits under Social Security Disability Insurance (SSDI) & Supplemental Security Income (SSI)

- **Cost Reimbursement (CR)** (authorized in 1981)
  > Reimbursement for the cost of services provided
  > Only available to State Vocational Rehabilitation Agencies (SVRAs)

- **Ticket to Work program** (authorized in 1999)
  > People, ages 18 thru 64, receiving cash disability benefits receive Tickets in the mail from SSA
  > Available to both SVRAs & approved Employment Networks (Ens)
Program Goals

• **Cost Reimbursement**: Makes VR services more readily available to beneficiaries with disabilities

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

• **Both programs are outcome-based**
  > Goal is to reduce/eliminate reliance on Social Security disability benefits, resulting in savings to Social Security
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)

  > Two SGA amounts that change each year

  > 2010 rates
    -- $1000/mo for beneficiaries with disabilities other than blindness
    -- $1640/mo for beneficiaries who are blind/visually impaired
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
SVRAs Got Special Treatment

Two provisions in the Ticket legislation give SVRAs special treatment

- SVRAs are automatic ENs
- SVRAs were given a choice, on a case by case basis, between serving beneficiaries
  - Under the traditional CR program
  - "or"
  - Functioning as an EN under the Ticket Program

Under the new Ticket regulations, this choice has important implications
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 employment supports
- Success depends on beneficiaries understanding options under Ticket program after VR case closure
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 retention services  
  Transportation  
  Benefits planning  
  Skill building  
  Licensure/Certification  
  Additional Education/Training  
  Mentoring  
  Other services/supports to maintain/advance in employment
How Does Partnership Plus Work?

When SVRA opens case & chooses the CR option

- SVRA notifies MAXIMUS (via electronic data file) of beneficiary’s SSN and IPE signature date

- MAXIMUS moves assignable Tickets to “in-use SVR” status
  - This status extends medical CDR protection to beneficiaries being served under CR
  - Beneficiary’s name is removed from list of beneficiaries with Tickets available for assignment
  -- Ticket is not available for assignment to another EN while VR case is open
How Does Partnership Plus Work?

When VR closes a CR case, SVRA notifies MAXIMUS (via electronic file) of the case closure

- MAXIMUS places beneficiary’s name back on list of beneficiaries with Tickets available for assignment

- Beneficiary has 90 days within which to assign his/her Ticket to maintain the protection against a medical CDR
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
- Letter/form must include case closure date, signature of VR representatives, status at closure – employed/not employed

(Note: Facilitate processing by writing the last 4 digits of beneficiary’s SSN & your EIN number on the letter/form prior to faxing to MAXIMUS)
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 job placement and initial efforts at self-supporting employment
- Level of employment at case closure (hours, earnings) does not matter

Even with the loss of the Phase 1 Milestone payments, each Ticket still has a value of $16,000 to $17,000
What Is Possible?

• Nationally SVRAs closes approximately 24,000 cases per year with beneficiaries working above SGA
  > Most of these closures represent potential Partnership Plus case where Phase 2 Milestone payments would be available to the EN one month after getting the Ticket assignment

• Typically, less that 50% of these beneficiaries are still working above SGA after 9 months

• If VR and ENs work together to provide Ticket Holders access to ongoing support services, SSA believes the number of beneficiaries earning above SGA for 9 months could double in 2 to 3 years
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 (Not a Partnership Plus case)

- SVRA will be compensated under its elected EN payment system (Outcome or Milestone/Outcome)

- If an EN gets the Ticket assignment after VR case closure, would likely be looking at a shared Ticket payment situation
  - Some states have written agreements spelling out how EN payments will be shared (e.g., WI, SD, VT)
  - If no agreement exists, MAXIMUS has a process for splitting payments
SVRAs Operate Under Their Own Law and Regulations

SVRAs are mandated to provide information to facilitate informed choice by their consumers

- 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
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
A variety of Partnership Plus models are emerging

- Most VR agencies are serving all beneficiaries under CR
- A few VR agencies have pilot projects where VR functions as an EN for certain populations (e.g., SE, MH) – Some are sharing Phase 1 Milestones with ENs
- 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)
- Many Partnership Plus handoffs happen behinds the scenes

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Once you have been approved as an EN, you should initiate a discussion with your SVRA

- Let them know you are an EN
- Discuss how you can partner in meeting the employment-related needs of beneficiaries

> Order of Selection states: Seek referrals of wait-listed beneficiaries

> Provide services to help beneficiaries maintain employment and training/education to help beneficiaries to advance in employment

> Provide services to beneficiaries who are unsuccessful VR closures
Now let's hear from some ENs that are working with beneficiaries after VR case closure.
David Lin and Patty Isola
Palm Beach Habilitation Center, Inc.,
Lake Worth, Florida
Florida

- Florida ranks at bottom 10% in per capita spending for individuals with disabilities

- Agencies have to develop creative system of supports for individuals in employment

- Upon VR case closure, supports provided through a variety of funding sources create seamless transitions for individuals and employers
• Prior Ticket to Work program placed too much responsibility on the part of the EN

• PBHC enrolled as an EN when the program benefitted the individual and the agency

• Since the initial Partnership Plus agreements seemed to be labor intensive, the Center decided we could get just as much return on our investment without signing an agreement with VR
• The Center currently supports 179 individuals in Supported Employment

• 84 of these individuals are eligible to participate in the Ticket to Work program

• Enrolling these individuals was easy because a rapport had already been established with the individuals and employers
• The Center is a vendor agency through Vocational Rehabilitation

• Upon successful VR case closure, individuals are assessed to determine need for services

• Utilizing rapport established during VR process, enables agency to discuss assigning the Ticket to Center after completion of VR services
• Focusing on roles and responsibilities as an EN and VR vendor makes the Ticket program work

• The Center refers most individuals requesting services to VR for Phase 1 type services

• VR has the option of referring individuals back to the Center or other qualified vendors under their contracted services
• This process benefits the individual by providing flexibility and resources of VR

• Individuals who do not qualify for VR services or are placed on a waiting list can still request EN services

• Resources are maximized while collaboration is emphasized and the end result is a positive employment outcome
North Carolina

Beverly Vinson
Director of Employment Networks
Preferred Alternatives, Inc
Fayetteville, NC
(home office)
Preferred Alternatives, Inc.

Preferred Alternatives began providing services to people with disabilities in 1997 in the state of North Carolina. It has since expanded services into Tennessee and Missouri.
Preferred Alternatives, Inc.

- Employment Services have been provided to consumers in NC since 2004 as a vendor for VR. We currently serve 97 out of 100 counties in the state of NC.
- Since we were already providing Employment Services, Ticket to Work was a natural fit for PAI. It simply gave the company another revenue source and allowed us to use the expertise we already had to serve an expanded population.
- In November 2008, PAI submitted an application to become an EN for the Ticket program.
- In January 2009 the program was officially begun with the Director being hired and operational procedures put into place.
• Services were started with personnel that were already in place to serve VR consumers (same Employment Coordinators, same Employment Coaches, etc.)

• Revised procedures that were being used for VR for use with Ticket to Work
• PAI Ticket to Work serves all populations, including specialty services for people who are deaf/hard of hearing and those who are blind.

• Services provided include:
  – Resume Development
  – Assistance with Applications
  – Interview Preparation
  – Job Search
  – On-the-Job Training
  – Marketing Skills
  – Networking Skills
  – Understanding ADA and assisting with accommodations
  – Long Term Support
The 2009 Annual TTW Report Data:

- 105 Tickets assigned to PAI
- 21 beneficiaries were employed
- 52 beneficiaries were actively pursuing employment
- 32 beneficiaries were not actively pursuing employment (16 not active; 16 were unassigned)
- Placement rate was 21%
- Average time from signing IWP to job placement: 12 weeks
- Average hours beneficiaries were working: 27.4
- Average hourly wage for employed beneficiaries: $9.90; ranged from $7.25-16.00 an hour
- Types of employment includes: Food Services, Retail, Education, Health Care, Insurance, Environmental Services
• PAI has billed and received approximately $80,000 in payments through the Ticket program in just over a year
• Most beneficiaries are in Phase 1 payment
• Three beneficiaries are in Phase 2 payment
• At this point we have no beneficiaries in the Outcome Phase
Pearls of Wisdom

• Develop a relationship with your State VR agency(ies), especially the Community Rehab Program Specialist (CRP). PAI already had a wonderful working relationship with both VR agencies in the state. Even if we have a Ticket assigned, if the person needs services from VR, we don’t hesitate to make the referral.

• Be accepting of where the beneficiary feels comfortable in the return to work process. Not everyone is going to be able to abandon their benefits check. Our goal is always to help the individual become as independent and self-sufficient as possible without doing harm.

• Act quickly when a beneficiary makes contact with you. They are fairly transient and difficult to contact if you wait too long.
• Get to know your CWIC and make it a policy to automatically refer the beneficiary to them for benefits counseling as soon as job placement seems imminent. Also, there is a Work Incentive Liaison in each local SSA office that can help you immensely with tracking income and benefits.

• Study the materials provided and don’t be afraid to call and ask questions.
Tammy Liddicoat
Executive Director
Employment Resources, Inc.
Madison, Wisconsin
About ERI

✓ Small non-profit
✓ Big focus on benefits/work incentives and employment for over 15 years – direct service and training
✓ Understand complicated systems beneficiaries are operating under
EN decision driven by:
- Potential value of Ticket (post VR)
- What we do best
- All could WIN with collaboration

History:
- 2008 – Planned and planted seeds
- 2009 – Tested processes and strategies
- 2010 – Ready for business, roll out
ERI PLUS EN

Mission:

✓ Find new source of funding for benefits counseling
✓ Capture available $$$ for Wisconsin beneficiaries
✓ Foster employment retention

Who we serve:

✓ People Already Working Substantially (PAWS)
Collaborative Model

- Any VR vendor can participate in Ticket to Work
- True Choice!! Option to work with any vendor
- Ticket Share strategy = 75% Vendor  25% ERI PLUS

ERI PLUS provides:

- Ticket assignment
- Benefits counseling
- Ticket to Work program management
- Wage and payment processing
Focusing on the “Network” in Employment Network

Barbara Butz
Daniels and Associates, LLC
CESSI Subcontractor
Partnership Plus: Benefits to SVRAs

- Provides a new option for assisting beneficiaries to retain and advance in employment after VR closes the case
  > Ability to focus on long-term competitive employment

- 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 SVRAs
(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
Partnership Plus: Benefits to the Beneficiary

- Increases choices for beneficiaries who are seeking employment-related services and supports

- Access to individualized, sequential services

- Access to a 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

- needed to retain and advance in employment
Partnership Plus: Benefits to ENs

• Ticket payments are unrestricted funds that can be used to
  > Hire new staff
  > Expand access to services to new populations
  > Fill in gaps in services

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

- Increases access to information about employment-related services and supports
- 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
Check out the online Partnership Plus Toolkit at

http://PartnershipPlus.cessi.net
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.)
More Information

For more information on the Ticket to Work program, visit:

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

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