

6/8/20

## **Building In-House Expertise in SSA Disability Benefits Advisement: Iowa Vocational Rehabilitation Services**

### **Highlights**

- Iowa Vocational Rehabilitation Services (IVRS) has established a leadership position within the agency designed to build expertise in SSA Disability Benefits Advisement and Management
- This new position (Benefits Planning Resource Manager) provides training and support to the Benefits Planning Cadre, which includes a representative from each VR office. The role of the cadre members is to be a leader in each office regarding knowledge and awareness of SSA benefits and work incentives
- Activities of the cadre have expanded to establish semi-monthly meetings in the evenings to include counselors, participants and families, to create a medium to expand awareness of the importance of effective and informed benefits advisement for quality employment outcomes

### **Description**

#### History

IVRS has worked for nearly 30 years to support the development of resources outside of the agency to utilize for SSA disability benefits advisement. In the early 1990's, the agency participated in the training and support of 12 individuals who would contract with IVRS and other agencies to provide this support. IVRS participated in the advisement of the BPAO and WIPA initiatives in Iowa, and in the collaborative strategy with the Bridge to Employment (SSA) and Disability Employment Initiative (DOL), to place SSA Disability Benefits Planning expertise in One-Stop Workforce Centers. As these efforts have not resulted in consistent quality and availability of the necessary expertise and support for IVRS participants, the agency has determined that establishing the availability of this resource internally is an important strategy.

#### Steps and Activity

IVRS recognizes the importance of consistent and immediately available expertise with regard to Social Security Disability Benefits, Work Incentives, and effective strategies to reduce risks while developing self-sufficiency through career success. In 2019, IVRS implemented an internal strategy to build internal capacity to support its participants on SSA disability benefits



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in achieving career objectives.

The initial step is the development of a management-level professional in the agency with SSA benefits expertise who is able to provide direct services to participants related to SSA benefits advisement and support, and to support all VR Professionals in the field. This position is titled: **Benefits Planning Resource Manager**. This professional reports directly to the IVRS Administrator, David Mitchell, and has professional expertise in SSA disability benefits and is certified as a disability benefits planner or advisor.

Once hired and on board, Suzie Paulson worked with the Bureau Chief and Area Supervisors to establish a **Benefits Planning Cadre**. This cadre of 28 is composed of staff from each office, with the responsibility to grow in their own expertise with regard to SSA Disability Benefits advisement and to facilitate increased awareness and understanding of disability benefits, self-sufficiency strategies and supports, and other resources available to them in serving their job candidates. Eight IVRS counselors are in the process of becoming certified by Virginia Commonwealth University (VCU), who is contracted by SSA to train WIPA project staff. This certification is at least a year of training and requires 18 continuing education credits each year to remain certified. Suzie facilitates weekly meetings with the full cadre, and maintains an open calendar so counselors can easily schedule job candidates as needed. Counselors can also call or text when meeting with a job candidate if expertise is needed on the spot. Technical assistance is crucial for providing support and maintaining expertise.

To provide all IVRS staff an opportunity to be introduced to information on SSA disability work incentives, Suzie provides “Benefits Planning 101: An Overview,” which is held every fourth Tuesday of the month, from 3:00 P.M. to 4:30 P.M. This session will have 10 to 13 staff members in attendance. Cadre members are also creating a 100-question assessment for staff to test their knowledge. All training that is created is recorded and closed captioned for staff to review when time permits and has a short quiz to test knowledge.

In addition, there are topic-specific “Tuesday Trainings,” which average 20 staff members. The topics are as follows:

**April 7 - Transition Training - Part 1 - Student Earned Income Exclusion**

**April 14 - Transition Training - Part 2 - Age 18 Redetermination**

**April 21 - Transition Training - Part 3 - Section 301**

**April 28 - Analyzing the BPQY - Helping your job candidates expand their employment opportunities**

**May 5 - SSI & PASS - The Basics - Catapulting off benefits**

**May 12 - Understanding the Work Activity Review (CDR) - How we can help SSA.**



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**May 19 - Reporting Wages - *Avoiding the overpayment, underpayment rollercoaster ride.***

**June 2 – 100-year Celebration of Vocational Rehabilitation**

**June 9 - Ticket to Work Series - *How to have a conversation about Ticket and case closure.***

**June 16 - Ticket to Work Series - *Understanding Timely Progress***

**June 23 - Ticket to Work Series - *The Ticket Hand off***

Additionally, to expand the knowledge base of IVRS job candidates, every Friday afternoon at 1:00 P.M., there is a *Job Candidates Introduction to Social Security Work Incentives* training.

### Expansion

David has stated that he is pleased with the increase in staff knowledge of basic “SSA Benefits 101-type” information. Now Suzie and the cadre are working to build the capacity. They realize that individuals are achieving career outcomes they may not have before as a result of the approach the agency has taken. The team is also challenging itself to increase the establishment of PASS plans in use.

This team sees the problem of misinformation about SSA disability benefits as a challenge for students and their families in considering the advantages of self-sufficiency. In response, IVRS is providing informational meetings on Thursday evenings at 6:00 P.M. to meet directly with two target populations and their families to increase knowledge and understanding. These two groups are parents and students that are Deaf or Hard of Hearing and parents of transition-age youth. They meet every other week.

	Deaf/Hard of Hearing	Transitioning Youth	IVRS Staff
April 29, 2020 – Understanding SSI & SEIE	7		3
April 30, 2020 – Understanding SSI & SEIE		61	5
May 13, 2020 – Transition Services IVRS	5		5
May 14, 2020 – Transition Services IVRS		47	7
May 27, 2020 – Applying for SSI	6		3
May 28, 2020 – Applying for SSI		53	7
June 10, 2020 – Reporting Wages			
June 11, 2020 - Guardianship			
June 25, 2020 – iABLE Accounts			



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## Challenges

- As mentioned, misinformation about SSA disability benefits and work incentives creates a perception among many job candidates (and some professionals) that they are better off not working. The efforts listed above represent the agency's strategy to address this information and put job candidates and staff in touch with accurate information that they can trust.
- There is currently a lack of quality Ticket to Work Employment Networks (EN's) in Iowa to offer ongoing support to IVRS job candidates that exit. Some are undermanned, some have a high bar for which ticket they will assign, and some do not have the internal expertise to be responsive to the ongoing support needs of SSA disability beneficiaries who desire to grow in their career without a dependency on SSA disability benefits.

## **Impact**

A year into the implementation of this internal capacity building strategy, Administrator David Mitchell, considers the impact so far. At the outset, there was an expectation that the outcome would be an increase in quality employment outcomes for job candidates that are on SSA Disability benefits and an increase in the cost reimbursement from SSA to the agency. While David acknowledges, not in terms of numbers that he is able to report as of now, but in terms of feedback that he is getting from staff, that there are job candidates achieving quality employment outcomes as a result of this investment. The agency is not yet, however, realizing an increase in cost reimbursement from SSA. David states that it may be too early for that. In discussions with the Benefits Planning cadre, there is a belief that the primary emphasis needs to be on building capacity of the agency through the increased comfort of its professional staff to serve job candidates that are initially dependent upon SSA disability benefits with all of the regulatory, compliance, emotional and misinformation issues and dynamics that go along with it. Down the road, increased quality career pathway outcomes and cost reimbursement funds to the agency should reflect success in meeting the primary emphasis of expanding the capacity of professionals in the agency.

Focus: Expanded Expertise in Supporting Participants on SSA Disability Benefits

Indicators of Success:

- a) Active cadre members in each office building awareness and serving as a resource
- b) Improved career outcomes for job candidates on SSA Disability Benefits
- c) Increased Cost Reimbursement (long term)



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## For More Information:



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