

6/23/20

Virginia's Investment in "Work Incentive Specialist Advocates" to Support Career Outcomes through Stronger SSA Work Incentive Expertise

Highlights:

- The establishment of a core group of Work Incentive Specialist Advocates (WISAs) as SMEs on SSA disability benefits and work incentives supports Virginia's employment-first approach to service delivery by using work incentives counseling, financial literacy initiatives and WorkWORLD to shift client and counselor focus from how benefits will be reduced when an individual works, to how their overall, disposable income will increase as they work. This shift leads to stronger employment outcomes that help individuals focus on working towards self-sufficiency.
- Virginia's Department for Aging and Rehabilitative Services (DARS), in partnership with centers for independent living, community service boards, community rehabilitation programs and other employment service organizations, has invested nearly 20 years in support of this important resource.
- DARS has also invested in internal expertise and resources to support their VR counselors, managers and staff to integrate work incentives counseling and financial literacy into their counseling and guidance processes for individuals receiving services from VR.

Description:

During the 1990s, the Virginia Department for Aging and Rehabilitative Services (DARS) recognized that individuals who receive services from VR and are Social Security Disability (SSD) or Supplemental Security Income (SSI) beneficiaries face -- or are perceived to face -- system challenges when it comes to the achievement of career outcomes that will allow them to work off of Social Security benefits and achieve self-sufficiency. While individuals were often placed in jobs that allowed them to earn wages high enough to work off benefits, they often quit or reduced their hours once they began seeing a reduction in benefits out of fear that the loss of benefits would leave them without health insurance or a means of support if the job didn't work out.

At that time, before the introduction of the Ticket to Work and Self-Sufficiency Act of 1999, while SSA work incentives and healthcare protections were available, they were not widely publicized, and many individuals either didn't know they existed or didn't know how to access them. There was a lack of accurate information about available work incentives, resources and SSA employment rules, which led many beneficiaries to work fewer hours and take lower-paying jobs in an effort to maintain their SSA benefits.



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In collaboration with many community partners in the early 2000's, and through the efforts of the state's Medicaid Infrastructure Grant (MIG), DARS supported the creation of a network of Work Incentive Specialist Advocates, or WISA's. These are individuals trained and recognized through Cornell University or Virginia Commonwealth University (VCU) to be at the level of competency to operate as Subject Matter Experts (SME's) on Social Security Disability benefits, SSI, work incentives and advocate for strategies to meet career objectives that will decrease a beneficiary's need for those benefits and supports. WISAs were then contracted by DARS and The Department for the Blind and Visually Impaired (DBVI) to provide work incentives and benefits counseling to SSA disability beneficiaries served by the state VR agencies.

At the same time, DARS established an internal SME, a Work Incentives Specialist Coordinator, that operated on a part-time basis to help connect VR professionals and the people they serve to the expertise of the WISA's. The Work Incentives Specialist Coordinator is responsible for ongoing technical assistance and training for VR counselors, staff and WISA's on a wide variety of issues related to benefits, work incentives and financial literacy initiatives to support an employment-first approach that encourages all individuals with disabilities to maximize their employment potential.

With full support and encouragement from DARS leadership, David Leon, the Deputy Director of Workforce Programs with DARS, has been invaluable in building the resources and promoting awareness of the importance of this expertise to help beneficiaries of disability benefits maximize their employment potential. David's work has identified that through the promotion and utilization of work incentives counseling and financial literacy initiatives, DARS has seen an increase in:

- a) Rehab rate; and
- b) Cost reimbursement via the Ticket to Work program generated by participants who received these employment supports and worked their way off of benefits.

As David became involved in growing Virginia's investment in the WISA program, through promoting the use of work incentives and financial literacy initiatives, DARS expanded the Work Incentives Specialist Coordinator to a full-time role. This individual is trained as a Work Incentive Specialist and:

- a) Maintains the "WorkWORLD" software, an online, state-specific tool that screens eligibility for work incentives that clients are eligible for and not utilizing, and demonstrates to the client how their disposable income can increase as they go to work, get a raise, increase their hours, or experience any other employment-related changes;
- b) Serves as the in-house SME on all things related to SSA disability benefits, state-specific benefits and work incentives, providing support to VR staff and WISA's through ongoing technical assistance and training;



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- c) Triage service issues and supports counselors in the subject area, including direct support in customer services as needed;
- d) Facilitates ongoing opportunities for counselors and other staff to increase knowledge and awareness specific to SSA disability benefits, work incentives and policy;
- e) Represents agency on cross-agency workgroups
- f) Addresses issues and questions that come to legislators from the public; and
- g) Provides periodic, ongoing reviews of WorkWORLD summary and analysis reports completed by WISA's before the information is distributed to the client and counselor, ensuring that the information that is provided is complete, accurate and thorough.

Since 2011, this expertise has become an integral part of the rehabilitation services offered by the state VR. The establishment of the Work Incentives Specialist Coordinator, the value-added components and resources developed by this role as listed below and the foundation of WISA network statewide are expanding a sustainable service capacity. The WISA's have become community partners with the state VR, and many of them are employed by agencies that also have Partnership Plus agreements with DARS under Ticket to Work, ensuring that clients who are self-supporting upon VR case closure can keep their jobs through access to continued employment supports through these Employment Network (EN) partners. This not only increases employment outcomes for the client and VR, but also reduces recidivism within the system.

Services are authorized to the WISA's by VR counselors, or through the Medicaid waiver system when appropriate, and are paid through a fee-for-service model. Payments are made to WISA vendors once the service has been completed, and in the case of a work incentive, applied to a client's SSA record or Medicaid case as appropriate.

Today, there are 16 billable services under the WISA model and 117 WISA's that make up this network, and all are trained through either VCU or Cornell. This is rigorous training that is a six-month process at a minimum for all who enroll. Upon completion of the program, individuals are certified as Work Incentives Practitioners, a certification which is required before any individual can receive or bill for referrals.

Other Value-Added components and strategies:

- WorkWORLD has been incorporated as a tool used by WISA's, counselors, beneficiaries and other professionals working with SSA disability beneficiaries. This is a tool that allows service professionals and job seekers to develop an understanding of how different levels of income impact their disability benefits, highlighting an individual's maximum earnings potential in their chosen career by showing them at least one scenario of what their finances will look like if they were to work full-time and off of benefits
- Increased focus on financial empowerment as a part of rehabilitation services. VR supports training for counselors and people served. This includes financial health



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assessment and strategies to build financial capability and empowerment, including utilizing the work incentive Plan to Achieve Self-Support (PASS) and Achieving a Better Life Experience (ABLE) accounts to encourage and allow beneficiaries of needs-based benefits such as SSI and Medicaid to build savings for their future without an impact on their benefits. Financial literacy is an important strategy used with VR initiatives directed to populations specifically identified as being without support systems and receiving public support.

- Increased emphasis on partnerships with successful Employment Networks (Ticket to Work).
- Strengthened the Role of ENs with Exiting Participants. This effort is seen in VR's work to embed WISA services within the partner ENs, which increases their capacity and improves cost reimbursement for the agency through Partnership Plus. This also had the added effect of increasing federal Ticket to Work revenue coming back to DARS partners and strengthening partner organizations.

Impact/Outcomes:

A VR participant received support from a WISA, along with career counseling from a VR Counselor. This individual received training in college and was one of the first individuals to have a WorkWORLD analysis completed. As the individual finished school and was exploring career opportunities, the individual's mother pulled up the WorkWORLD overview, which was developed a year and a half earlier. She recognized the importance of contacting the WISA to be assured of maintaining important Medicaid protections as the individual established comfort and confidence in the career choice.

- 1) State-level agencies that serve SSA disability beneficiaries contract with the same network of established professionals (WISA's) with a common standard for content knowledge and customer service. This collaborative investment and oversight establishes consistency in the service and message to the community, which strengthens the confidence of those receiving the service. This also establishes a united front to address misinformation and misconceptions in the community about SSA disability benefits and work.
- 2) Investment in building this network and recognition of impact on VR participants over time has created a change in agency culture to integrate this support into the rehabilitation process. Related language regarding the use of financial health assessment and wellness, work incentives and benefits counseling is a part of staff job descriptions, training/guidance and is reflected in performance reviews.
- 3) Recently, the agency's VR leadership made the VCU free online introductory Social Security Disability Benefits, Work Incentives, and Employment Support Programs web course mandatory for placement staff and Business Development Managers (BDM's), so that these professionals will be in a position to encourage participants to work more



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hours when the opportunity presents itself. This training is recommended for DARS staff in other roles.

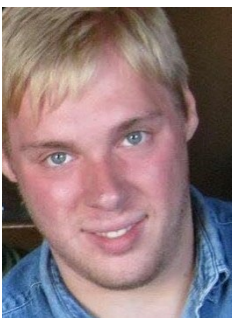
- 4) Specific, internal DARS staff have completed the Cornell full-certification training to make sure that opportunities for the promotion of work incentives are not missed with other stakeholders and partners.
- 5) DARS Leadership will continue to monitor other internal changes that reflect the importance of this expertise in the rehabilitation process for participants. In addition, the agency will also monitor:
 - a. Rehabilitation rate for individuals who have received this support; and
 - b. Cost Reimbursement with SSA.

Information about WISA's: At this link, readers will see how providers of the services of WISA professionals are marketed. The specific provider in this example is "[The Choice Group](#)."

For More Information:



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