

WorkVT2.0

What we propose to carry forward in
HireAbility case practice



SSI/SSDI Beneficiaries

- SSI/SSDI beneficiaries are disproportionately poor
- About 75% of SSI and 28% of SSDI beneficiaries live below the federal poverty level.
- The only guaranteed route out of poverty is employment.
- Most beneficiaries do not work or work at relatively low levels. Even beneficiaries engaged with the public vocational rehabilitation program do not end up working at self-sustaining levels.
- WORKVT2.0 was designed to change this.

Basic Work Rules for Social Security Disability Insurance (SSDI)

- Beneficiaries get a nine-month Trial Work Period when the beneficiary can earn any amount. A beneficiary must earn \$1,050 (in 2023) or more to “use up” a Trial Work Month
- Once the 9-month Trial Work Period is exhausted, beneficiaries receive a 36-month extended period of eligibility. During this period earnings above Substantial Gainful Activity (\$1,470 per month in 2023) will result in a suspension of the SSDI benefit for each month of SGA
- Once the extended period of eligibility is exhausted, any earnings above SGA will result in termination of eligibility
- The all or nothing nature of SSDI work incentives has been described as the cash cliff

Work Rules Supplemental Security Income (SSI)

- Beneficiaries receive a \$65 earned income disregard
- Earnings above \$65 result in a \$1 for \$2 reduction in cash benefits
- If the beneficiary zeros out their cash benefit they can retain eligibility for the program and Medicaid if earnings do not exceed \$41,367 (2023)

NOTE: *20% of beneficiaries receive both SSI and SSDI so they have to deal with both sets of work rules*

What is the problem we want to solve?



Despite Vermont's strong track record, we know we can do better.



DVR conducted a review of beneficiaries enrolled between 2008 and 2014 and tracked employment outcomes through 2019.



About 60% of beneficiaries served became employed during this period.



About 40% had earnings exceeding SSA's Trial Work Level.

Goals of the project



- The goal of the project was to change the way VR in Vermont manages cases on SSDI/SSI in an entirely different way. Through intentional teaming of cases, intensified CWIC services, financial assistance at the point when people need it the most, and keeping cases open longer.

How we did the work

Intentional
Teaming

Team
knowledgebase
of work
incentives

Keeping cases
open longer

Milestone
payments

CWIC
interventions

Intentional Teaming



Team members: Vocational Counselor, Employment Consultant, Certified Work Incentives Counselor, Regional Manager and Business Account Manager, & Program Manager.

- All team members meet weekly to review cases and provide input
- CWIC involvement at every step vs one and done service (pre-plan development, at offering of PWE.CTO, at job search, once job is secured, after placement, etc.)
- Multiple staff reaching out to try to engage.
- A full team behind each person
- Brainstorming and planning next steps together for each person during weekly case reviews

Keeping cases open longer



Cases remained open for the duration of the study. Benefits include:

- Some people reengaged when offered training flyers or job fair announcements or monthly outreach from various team members
- Teams continue to try difference approaches to reengage people who might have otherwise not accesses services
- Additional support provided to people who would have otherwise closed successfully- offering advanced trainings, staying ahead of problems that arise in a new job, and career advancement opportunities, etc.

Milestone achievement payments



Milestone achievement payments made \$250 at TWP level, \$750 at SGA level and \$1000 at zeroed out benefit.

- Provides opportunity for teams to talk about financial intentions; earnings, savings, planning
- Provides financial support at key points when participants need it the most
- Gives participants a safety net
- Give intentional goals around earnings for IPE

CWIC Services

Early referral to CWIC, well before IPE development

CWIC provides Benefits Summary and Analysis with multiple earning levels

CWIC provides written follow up materials

CWIC involved at all junctions of the case- pre-IPE development, when considering education and training, work experiences, job search and once employed.

Full Team understanding of Work Incentives

- All team members took VCU introductory web course
- Team members heard CWIC perspective at key steps in the process.
- Increased staff understanding of where someone is at in their work incentives, what happens next, how much someone needs to earn to get to next level
- Helped shift how staff talk to consumers about their benefits matters; shifting from a benefits preservation mindset to exploring all possibilities. Offering career pathways to all people not just those staff think will work off benefits.

Data as of 12/2023

Enrolled: 144

Withdrew: 28 (during initial start up)

Overall Participants: 116

Age: 25 under age 30, 67 ages 30-45, and 51 ages 45-65

Employed: 88

Full time: 32 average wage \$18.46/hr (29 longer than 90 days)

Part time: 63 average wage \$16.42/hr (46 longer than 90 days)

Achievement Payment earned: 62 *people earned at TWP level or greater*

All three Achievement Payments completed : 26 *people zeroed out their benefits with SSA*

Enrolled in Post Secondary Ed or Credentialed Training Program: 37

Proposals for all of HireAbility

- ALL HireAbility & VABIR staff attend VCU Introductory Web course (add to on boarding menu)
- Teaming case review for all SSDI/SSI cases with CWIC, EC, VC (with Newport excel sheet as model) monthly min
- CWIC referral early in HireAbility process, BS&A for multiple earnings levels/goals preplan, intentional involvement throughout the life of the case.
- Team decision on moving SSDI/SSI cases into JRS/CWIC JRS case type when closed successfully
- Develop a system for sending training or education information to closed cases or people who aren't engaged

What we are still working on

- **Systems work on the Benefits Preservation mindset shift-** continue to identify areas in our current practice where this exists, develop training material specific to this.
- **Intentional follow up for career advancement once working for all SSDI/SSI cases, moving beyond the parked earnings.** Consider focusing a QA reviews once a year on SSDI/SSI cases, provide a parking report to counselors and data on their closures. Does this mean a checklist prior to closing?
- **Achievement payments-** Continue exploring funding opportunities to provide achievement payments statewide.
- **How do we staff these cases?** How do we replicate the work of WorkVT2.0 in our existing staffing structure?