

WORK INCENTIVE BENEFITS COUNSELING

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>> During Ms. Sullivan's webinar, if you have a question specific to the webinar, please use the Q&A box to add that question. We will be reviewing all the questions as Ms. Sullivan is going through the webinar, and at the end of the webinar, we will have a live Q&A session with Ms. Sullivan, and we will have collated some of those questions. All the questions we will get answers to working with Ms. Sullivan, and the recording of this webinar, transcript/the captioning of the webinar, as well as the answers, all the questions and the answers, we will be subsequently posting on our Project E3 site.

So, without further ado, we will get started, and please stay with us for the live Q&A that will follow the webinar.

> -- say more about helpful later in the presentation.

On this next slide I'd like to give you a few minutes to review our acknowledgment and disclaimer slide, and also like to thank the individuals at Southern University who provide project leadership for this particular RSA grant.

Op slide 3 would like to give you an overview of Project E3 for those of you who may not be familiar with our project. As you can see, the purpose of Project E3 is about improving capacity of state VR agencies, specifically to address barriers to VR participation and the attainment of competitive, integrated employment with historically underserved groups of individuals with disabilities from low-income communities. And how does this particular webinar align with our Project E3 purposes and learnings? As you can see in that first sentence, as we have been working with the different sites that are part of this project, approximately 12 sites, we have been getting repeated requests for additional information about work incentive benefit planning services and again how VR programs and their partners can use that information to increase VR participation, and one group of individuals I mentioned previously.

Because it -- and this is for a variety of reasons, some of which is turnover in VR agencies as well as some agencies not as familiar with work incentive planning services as others. So that's one of the main reasons for offering this particular webinar, and we are also offering this as a possible refresher for those of you who may have had some training or background or another webinar on work incentive benefit planning services. This could be a nice little refresher for that.

As I noted there at the end with some of the VR programs we are familiar with, they seem to feel that having work incentive benefit planning services and a general background among staff can improve

access to VR and can help increase employment outcomes.

Thank you very much, and enjoy the webinar.

>> MOLLY SULLIVAN: Hello. My name is Molly Sullivan. I am the Director of Training and Certification at the Virginia Commonwealth University work incentive planning and assistance National Training and Data Center. At the WIPA NTDC, we are funded by Social Security to provide training and technical support for about 700 professionals across the country who provide work incentive planning services. I am pleased to be here with you today to share information about what work incentive planning services are and how a person with a disability can access them.

The overarching goal of this webcast is for you to know why you should refer someone for work incentive planning services and for you to know how to refer someone for this service. To achieve this goal, I am going to provide you with information so that by the end of the webcast you will be able to do five key things. You will be able to explain what work incentive planning services are. You will be able to list the eligibility criteria for Work Incentive Planning and Assistance projects, which we call WIPA for short. You will be able to locate a WIPA project based on a person's ZIP code. You will be able to list strategies to find other professionals providing work incentive planning services in your state. And lastly, you will be able to list ways you can build your own knowledge about work incentives.

All right. To tackle our first objective, I'll begin by providing you some basic information about the work incentive planning service itself. A good place to start is looking at the purpose for this service. Why does this service even exist? Well, work incentive planning services exist to help people with disabilities who are receiving public benefits, who we refer to as beneficiaries, and who are either working or are interested in work. This service can help those beneficiaries make an informed financial decision about work. You see, all too often beneficiaries choose not to work or limit the amount that they work because of bad information about the effect of work on benefits. This service provides the person with accurate information about the effect work will have on each of their benefits. And with that accurate information, the people can make an informed decision about work.

This service also helps beneficiaries use work incentives. Now, work incentives are benefit program rules that support working. For example, some work incentives make it possible for a beneficiary to keep Medicaid or Medicare when working. Other work incentives allow a beneficiary to keep some or all of their cash benefits when working. And others allow a beneficiary to keep their case file open even if the cash benefits stop due to work. The work incentive planning service not only helps a beneficiary see which work incentives could be useful in their situation; the service also

involves supporting the person in requesting and getting work incentives approved.

Now, another important aspect of this service is that it provides support to beneficiaries in developing strategies to manage public benefits. You've likely heard a beneficiary or their family member say to you it's like a full-time job managing these benefits. And the reality is it does take work to manage public benefits. Beneficiaries need to know when to report changes in their situation, who to report changes to, and how to make that report. And they need to know to do that for each type of benefit they receive, since reporting rules differ from one benefit to another. Ideally, each beneficiary has a recordkeeping system to keep benefit agency letters organized and to keep a record of their communication with those agencies. If beneficiaries don't stay on top of those reporting requirements, they could end up receiving benefits they aren't due or lose benefits they should still be receiving. Work incentive planning services provide support for beneficiaries in developing strategies to manage their public benefits and prevent these issues.

Lastly, the work incentive planning service includes help with problem solving some benefit issues. For example, if a beneficiary has received an overpayment letter due to work, a work incentive counselor could help that person explore whether work incentives could be used to remove the overpayment in that situation. As you can see, this is a very important service for beneficiaries who are working or interested in working.

So now that you understand the purpose of this service, let's take a look at what the service delivery process looks like: When a beneficiary is referred to work incentive planning services, in general there are six core steps that the work incentive counselor will take. First, the work incentive counselor will determine whether the beneficiary is eligible for work incentive planning services. That eligibility criteria will be based on whoever is funding that service. We'll talk a bit more about this later in the webcast.

In addition to determining eligibility, the work incentive counselor will usually need to triage the person's situation. In other words, the counselor will evaluate how quickly the beneficiary needs services. If the beneficiary meets eligibility criteria, the second step is for the work incentive counselor to conduct a comprehensive intake. Now, during the intake, the counselor will ask the beneficiary for information about their work goal, their benefit questions or concerns, demographic information, information about their income, information about health insurance, and their past work activity. The work incentive counselor will also ask the beneficiary to sign releases of information so that they can contact benefit agencies to verify which benefits the person has. They may also request signed releases of information to be able to communicate

with members of the beneficiary's employment team as needed.

After the intake, the work incentive counselor will contact benefit agencies and verify the person's benefits. In some parts of the country, this can take two to four weeks, and in other parts of the country, it can happen quicker. So there's some variation. Once the work incentive counselor has verified all of the public benefits, the fourth step is to analyze the effect of the work goal on each public benefit and write up a summary of that analysis in a report that we call a Benefits Summary & Analysis or BSA for short. The work incentive counselor may need to do a little bit of research around some of the public benefit rules or reach out to their technical assistants to complete this step, depending on the beneficiary's situation.

Now, the fifth step is for the work incentive counselor to provide the advisement. This is the meat of the service. In this step, the counselor explains what they estimate will happen to each benefit given the beneficiary's work goal. They also address what work incentives that they recommend the beneficiary use and how the beneficiary can financially get ahead by working.

The work incentive counselor will use the BS&A as a guide during this conversation, and the beneficiary has the BS&A to then refer back to as needed. The person's employment team members are absolutely encouraged to join this meeting, but if they aren't available, the work incentive counselor can share a copy of that BSA with them as long as the beneficiary has approved that type of information sharing.

The sixth and final step is also really the meat of the service. Work incentive planning includes providing ongoing support, assuming, of course, that the work incentive counselor's funding has allowed for that. And we'll talk more about that aspect a little bit later in the webcast. If ongoing support is something that the work incentive counselor is funded to do, this is an absolutely invaluable aspect of the service. The work incentive counselor can help a beneficiary use work incentives, develop strategies to manage public benefits, and problem-solve some benefit issues that arise. Depending upon the funder, this support could be available for a limited time or indefinitely.

All right. Now you know what the purpose of this service is and the steps that are generally taken to deliver it. Let's take a look at the professionals who make this service possible. The people who deliver work incentive planning services are generally professionals in disability services, and they are professionals who have acquired specialized knowledge and skills to provide advisement about effective work on public benefits. The job title that a professional uses will vary depending upon the funding agency and also whether that professional has attained a certification or not. Now, I will share with you the more common job titles you'll hear

so you can become familiar with who you might be teaming up with in the future.

The first job title listed here is a Community Work Incentive Coordinator, or CWIC for short. A CWIC is a professional who's funded through the Social Security Work Incentives Planning and Assistance Program. With this funding, CWICs provide beneficiaries free of charge advisement about the effect of work on public benefits. Now, Social Security requires CWICs to participate in an intensive training and pass a rigorous initial certification process prior to working with beneficiaries. And additionally, CWICs are required to complete continuing certification activities to maintain their certification. The program that I work for, the VCU National Training and Data Center, is funded by Social Security to provide that training and certification to CWICs.

Now, a number of years ago, Social Security opened up that rigorous training and certification to professionals who are not funded by the WIPA program but who have other funding that they can use to provide work incentive counseling. These professionals who complete this same initial training and initial certification process as CWICs are called Community Partner Work Incentive Counselors. These community partners must also complete continuing certification activities to maintain their certification. It's just that their requirements are slightly different from CWICs.

Now, the third job title listed is one that's also based upon obtaining a certification, the Benefits and Work Incentives Practitioner is a title that's given to a professional that completes the Cornell University training and certification requirements. And like the CWICs and Community Partner Work Incentive Counselors, Cornell also requires these professionals complete continuing education to maintain their certification.

Now, the last bullet on this slide lists a handful of other job titles you may hear, including work incentive counselor, benefits planner, and benefits specialist. These job titles are not associated with a national certification like the first three. It's possible a professional who uses one of these job titles has completed some type of training or even one of the certifications noted above, but you would need to ask them to clarify their credentials.

Throughout this webcast, I am using the generic term "work incentive counselor" to refer to any professional providing this service.

All right. Now you know what the purpose of this service is, you know who delivers this service, and you also know what steps are generally taken when a professional is providing this service to a beneficiary. So let's take a look at how you can achieve the first objective of this webcast. As a reminder, the first objective is for you to be able to explain work incentive planning services. To

do that, you'll want to combine the three topics you just learned about, what the service is, who delivers it, and how they deliver the service.

On this slide, you'll see some key points to say for each of those topics. In regard to what the service is, you'd want to share with a person that work incentive planning services can help them make an informed decision about work; can help them use work incentives; develop strategies to manage benefits; and problem-solve some benefit issues that arise. Then let the person know the service is provide by trained and certified professionals. Assuming, of course, that you are referring the person to a professional that has completed training and certification. Lastly, let the person know that the work incentive counselor will conduct a thorough intake, verify their public benefits, estimate the effect of work on those benefits, and provide ongoing support about benefits and work. As with anything new, at first this might seem like a lot to remember, but with practice, you'll see it becomes easy to remember these three concepts and explain the service.

Now, the availability of this service varies a bit from state to state because the amount of funding for this service varies from state to state. The good news is that there is at least one organization in every state that's funded to provide this service through the Social Security WIPA program. In just a little bit, we'll talk about some of the other programs that may be funded to provide this service in your state, but first let's look at some of the details about WIPA since we know for sure that exists in every state.

So through a competitive application process, Social Security awards WIPA funding to at least one entity for each state, and it's awarded to entities such as nonprofit organizations or a state agency or a county agency. In states with larger populations, there will be more than one WIPA project. For example, in Texas, there are five WIPA projects; whereas, in Wyoming, there is only one WIPA project. If a state has more than one WIPA project, each project will have a designated part of the state to serve. Generally the service areas are divided up by counties. So for example, if there are two WIPA projects in your state, often each will cover half of the counties so that together the entire state has access to the service. Another important point about this service is that a beneficiary can access this service free of charge. There is no cost because Social Security is funding this service.

So who can use this service? Well, to be eligible for services through a WIPA project, a person must be at least 14 years of age and under full retirement age. There are a few situations in which a person could be over full retirement age and receive services, but those are details that you would need to talk through with the WIPA project on a case-by-case basis.

Now, a person must also have been determined disabled based on Social Security's definition. And lastly, a person must be receiving either Supplemental Security Income, also called SSI, or be receiving a Social Security disability benefit, the most common of which is called Social Security Disability Insurance, or SSDI for short. If a person is not receiving one of those benefits due to work, it's possible they may still be eligible for services. Now, there are many beneficiaries in the country who meet this WIPA eligibility criteria. Since Social Security's goal is to promote employment, they require the WIPA projects to focus their time and energy on serving a few key populations. The first is people who are working, the second is people who aren't working but who are actively seeking work, and the third is youth ages 14 to 25. All three of these groups clue people who need work incentive planning services immediately, given their proximity to having earned income.

Now, it's possible for a WIPA project to serve someone who meets the eligibility criteria but doesn't fall into one of these three groups. But you'll need to talk with your WIPA projects to learn more about their capacity to serve those other groups.

So now you know the WIPA eligibility criteria as well as the groups that they have a heavy emphasis on serving. That means we've tackled the second objective. With those details under your belt, we'll talk about how you can find the WIPA projects in your state.

I am happy to report there is an online directory that you can use to locate the WIPA project that serves a particular ZIP code. The directory is located at www.choosework.ssa.gov. Now, once you navigate to that Web address, you'll need to click the term "Find Help." Then click on the phrase "Start Your Direct Search" which you'll find under the term "Option 2: Direct Search." Once you've done that, check the box next to the term "Benefits Counseling (WIPA)" and uncheck the other types of service providers, assuming that you are just trying to search for a WIPA provider. Then enter the person's ZIP code. Keep the default filters, I would suggest, in the search box to show that the services that are available, both virtually and in person, and then simply click "Start New Search." What will happen is the names of the agencies that provide WIPA services for that ZIP code that you entered will appear, along with their contact information. Now, if you run into any trouble using the search feature for this online directory, you can contact the Ticket to Work helpline at 1-866-968-7842. That phone number is listed on the Choose Work website.

So you can see how locating a WIPA project is easy. You simply need to know the person's ZIP code. Then, once you locate the WIPA project information, you can share those details with the person you are supporting, and they can contact the project and request services.

Now, if you are thinking you are going to be referring a large

number of people to the WIPA project, you can also reach out to the project yourself and ask if they would like you to follow any special processes for making a referral. By coordinating, you may be able to save everyone some very precious time.

All right. Now that you know how to locate a WIPA project, let's talk about other work incentive planning services that may be available in your state. As I mentioned earlier, one of the great aspects of WIPA is that it's available in every state. But the downside is that the funding is limited. In most states, the WIPA funding isn't enough to assist everyone who needs services. In response to this capacity issue, some states have found other ways to fund work incentive planning services. The availability of other funding for the service varies widely from state to state, but I can at least share with you some information about the more common efforts happening across the country.

Now, in a number of states, the state Vocational Rehabilitation agency has either dedicated specific staff to provide this service or they are paying to have this service using a fee-for-service model or contracting some of the funds to an agency, and that agency that has the contract has a dedicated work incentive counselor on staff providing services. What that means is that if you are supporting someone who is receiving VR services, it's possible they may be able to get work incentive planning services through the VR agency.

In some states, the Medicaid agency has included benefits advisement as a distinct Medicaid service in a home and community-based waiver, or the Medicaid agency considers benefits advisement to be an aspect of Medicaid-funded supported employment services. At this time, the Medicaid-funded options don't seem to be as common nationally as the VR-funded options, but they do seem to be growing. So a beneficiary would need to talk with their Medicaid case manager or their Medicaid-funded employment provider to find out if work incentive planning services are part of the Medicaid service package that they have.

Lastly, there are some organizations that have just taken the initiative to use their general agency funding to have one or more work incentive counselors on staff providing services to the people that their agency serves. This is something that you may find in an employment network or a supported employment program or even a Center for Independent Living, for example. In this type of situation, a beneficiary would be able to access work incentive planning services if they were a client receiving services from that organization that had built that internal capacity.

So now that you have an idea of some other ways a person may access this service, let's take a look at strategies you can use to find out what's happening in your state. Since each state is so unique in regard to what capacity has been built, you'll need to do a bit of networking to find who all is providing work incentive

planning services. If you are supporting someone who is enrolled in VR, begin by asking the person's VR counselor if there are any work incentive counselors on staff at the VR agency who provide this service or if there are any vendors that the VR agency contracts with to provide this needed service.

If you are working with someone who has a Medicaid-funded supported employment service, could you ask the Medicaid case manager if work incentive planning is a part of the Medicaid service package, and if so, who is providing that type of service. You could also ask the person's supported employment provider if they've built any internal capacity to provide this service. So it really comes down to taking a look at who the person is receiving services from to see if I in of those entities have built that capacity.

Now, this is not an exhaustive list. Instead, I encourage you to use this as a starting point and continue to ask your colleagues what do they know about who is providing this service in your state. Networking will be a huge resource for better understanding what's available.

All right. Let's take a look at our final objective. While referring someone to a work incentive counselor, it's helpful in many situations and an equally important step in addressing this need for you to be able to provide accurate and encouraging information about benefits and work. The people you support have developed a bond of trust with you, which means that what you say carries a lot of weight as they make important decisions about work. Given that, it's so important for you to build your basic knowledge about work incentives, and you can do that a couple of ways. You could take a Web course that's provided and approved by Social Security, which we offer through the VCU National Training and Data Center. It's called Introduction to Social Security Disability Benefits, Work Incentives, and Employment Support Programs. This is a two-week Web course, and it consists of six separate one-hour lessons. Each lesson includes a recorded video lecture with slides, some supplemental readings, as well as resources and tools and interactive activities and knowledge checks. Now, this is a largely self-directed and self--paced course, and it's also absolutely free. You can find out more information about this course by clicking on the first link provided on this slide.

Another great way to build your basic knowledge about work incentives is by reading through Social Security's publication called the Red Book. This publication provides clear and simple explanations of the basic work rules for Social Security Disability Insurance and for Supplemental Security Income. A link to the Red Book can be found at the end of this slide.

And with that, you now know why and how to refer someone for work incentive planning services. You know how to explain this service. You know the eligibility criteria for WIPA projects. And

you know how to locate a WIPA project based on a person's ZIP code. You know some strategies for locating other professionals in your state who might be providing work incentive planning services. And you know ways that you can build your own knowledge about work incentives.

All right. Now that you've gained all this great knowledge, we'd love to address any questions that came up for you during this webcast.

Q&A Session

>> TERRY DONOVAN: Great. Thanks, Molly. I will now turn it over to Heidi Decker-Maurer, who will facilitate the question-and-answer session, and again, I think with luck there's been a few questions during Ms. Sullivan's presentation. If something occurs to you while Ms. Sullivan is answering a question, please enter it in the Q&A box.

So with that, Heidi, take it away.

>> HEIDI DECKER-MAURER: Hi, everybody. Thanks so much for tuning into the webinar. We appreciate everybody coming to learn with us today. We've had a few questions, and we did have a few questions that came in before the webinar, so I am going to ask Molly some of the questions, and we can get her take on some of these subjects.

As Terry mentioned, if you have any more questions, please place them in the Q&A box, and we will get to as many as we can with the time we have left.

So first of all, Molly, thank you so much for the presentation. It was really a great set of information for people to either get familiar with some of those benefits options or to kind of have a refresher for some people, I am sure.

Some of the questions are specific, and a few of them are general. I am going to go ahead and start with a question about rent assistance being included in benefits. Can you talk a little bit about that for folks?

>> MOLLY SULLIVAN: Sure, you bet.

So rent assistance to me means subsidized housing of some kind, and subsidized housing is definitely a public benefit that work incentive counselors advise about and give information about. Some subsidized housing situations are pretty complicated. It depends on the person's unique circumstances, the number of people living in the household, the other income in the household, so the level of advisement that can be provided will differ a little bit from one person to another, but in general, subsidized housing is definitely one of the many public benefits that work incentive counselors can provide advisement on.

>> Heidi: That's fantastic. As with any place, I am sure

things are going to vary from location to location, but just broadly, it's great that there's information out there people can access so they can help their customers with these kind of questions.

Another question that we had -- we had pretty specific questions about people living with HIV and how they interact with work earnings. The question was about state AIDS drug assistance programs and HUD's Opportunities for Persons with AIDS program. The question said is WIPA's consultation an advisement to people living with HIV who are receiving SSI and/or SSDI now informed about these critical programs and their policies related to income changes for work earnings?

That's a pretty specific question for our kind of broad webinar today, but do you have any thoughts, Molly, on where people can find information about this?

>> MOLLY SULLIVAN: Well, yeah. So the housing assistance for people with HIV and AIDS is a type of subsidized housing program, so it's one of a handful. So certainly work incentive counselor, that falls in their scope of work to provide some information and advisement about. Again, depending on the complexity of a person's situation, that may affect how deep the advisement can go.

The HIV/AIDS Drug Assistance Program is certainly a public benefit program and one a work incentive counselor could provide some advisement on as well. That's not one that commonly comes up, I would say, having provided training and technical support to work incentive counselors across the country for a number of years and provided services myself, that falls into the category of one of the less common benefits we see. Sort of in line with that would be employment insurance or workers' compensation. So it's not one that comes up a lot, and I know as a work incentive counselor, when that comes up, I need to dig a bit, help the person with information needed to go forward with.

>> HEIDI DECKER-MAURER: For the person who asked the question, Mark, if you would like to go to the project E3 website, www.projecte3.com, there is some specific information about HIV/AIDS, that population, because it's one of the communities being pinpointed by the Project E3 study. The study is looking for solutions for some of these more unusual issues or some of the populations that really haven't been reached or helped yet. So we have several different categories of populations on the website, that our intensive technical sustains sites are helping -- assistance sites are helping, and one of the populations is people with HIV/AIDS. I am not sure if there will be specific answers to your questions there, but we do have quite a number of studies in our research database, and it is one of the populations that is being studied within the Project E3 grant project. So maybe that could give a springboard or help you out a little bit. I hope that helps. And thank you for your question.

We received another one, Molly, that says one of the questioners

has heard recently that due to some changes in funding, benefit planners will not be able to meet with clients until they are working. It sounds like maybe this is a rumor that somebody heard. I am not sure if that's something you heard about.

>> MOLLY SULLIVAN: I can clarify, yeah. And I tried to get at that a little bit when talking about the WIPA eligibility and who they serve. So WIPA projects have somewhat limited funding, so in terms of eligibility, the eligibility for WIPA services is actually quite broad, who is actually eligible for services. Folks within in a very broad age range who are receiving Social Security Disability Insurance or Social Security Supplemental Income, but that's such a broad category that it's just not humanly possible for the funds for a WIPA project to serve everybody in the state who meets that category, that eligibility criteria. So Social Security provided some guidance to WIPA projects and essentially said we feel like it's most important for you to prioritize serving people who are working or actively seeking work as well as youth. Youth are the third priority group. So if a WIPA project is swamped with referral, if they have a capacity issue that they are reaching, then they are going to need to prioritize providing services for people who work, so it's not technically that people aren't eligible if they aren't working; it's just a matter of resources. So those folks who are working or actively seeking work and who are youth are going to get access to services sooner.

>> HEIDI DECKER-MAURER: Resources. It comes down to that a lot of the time; doesn't it, Molly?

>> MOLLY SULLIVAN: It does, it does.

>> HEIDI DECKER-MAURER: Excellent. We do have a few more questions. Somebody is interested in finding out when could we expect the 2019 Red Book to come out, and are they free for state agencies to order? Is that something you know the answer to?

>> MOLLY SULLIVAN: I do, yeah. I certainly can't give you a specific date. I feel like every year it's -- I don't -- you know, over the years, I don't feel like it's been a particular month. Like the federal poverty level usually comes out -- you know, gets published a certain type of the year. And the Red Book, last year it was really delayed on when it came out. In fact, I don't think it was until the fall that we were able to order actual hard copies of the book. So my guess -- I mean, I would guess, and I would say within the next probably month or two or maybe three, it should be available online. And you can absolutely order publications for free, paper copies to be sent. You can order actual boxes if it would be helpful. I can provide a link to the website where it has information about ordering publications.

>> HEIDI DECKER-MAURER: That would be fantastic, Molly. Is that something you would be able to put in the Chat box, or is it something we would email out to folks afterwards?

>> MOLLY SULLIVAN: I would say email that out. I don't have that saved as a bookmark. I don't think I do right now. Oh, fabulous. That's the poverty guidelines that Rosemary popped in there. The website for ordering publications from Social Security, I'll get that for you.

>> HEIDI DECKER-MAURER: Excellent.

All right. We do have another question p.m. do WIPA services allow them to assist beneficiaries who find themselves in an overpayment from work situation? Can a WIPA evaluate and offer suggestions about how to deal with the overpayments?

>> MOLLY SULLIVAN: That's a great question. WIPA projects do have some limitations in terms of the supports they can provide about an overpayment. If an overpayment is related to work, the community work incentives coordinators, the CWICs, their area of expertise is the work incentives. So what they can do is help a person who has a work-related overpayment think through whether there may be some work incentives maybe that they actually were eligible for but Social Security didn't know about and help that person think through whether they should be requesting that those work incentives be applied when the person chooses to appeal that overpayment. They can certainly help a person through how work incentives may be able to reduce or, in a perfect world, remove an overpayment. CWICs can also explain the level of the appeal, the steps of the appeals process, and in particular the first level of the appeals process, and point out the paperwork that needs to be completed. The line is really around representing the person, so the CWIC is not -- the funding does not allow for them to provide representation for the person in any kind of level of the appeals process. So certainly information, planning, and some guidance is appropriate and can be provided.

>> HEIDI DECKER-MAURER: Excellent. Well, that covers all of the questions that we have in the question box right now, so I encourage anybody -- I'll leave it open for a minute or two more if anybody has any questions. But thank you, everybody. These have been great questions.

We also like to let folks know that we do record these webinars. They will be available afterwards. We post them on our website, which I just put the Web address in the Chat box there. So we have a category called webinars, and all of the webinars that we've produced so far will be available on the website for folks to go back and refer to. We also provide the PowerPoints for people, so you can go back and look at the slides as many times as you'd like to or if there was anything you wanted to look at in a little more depth, those things will all be available for you under the webcasts tab on the Project E3 website.

Now, I am not sure if everyone knows from the introductory slides, it talks a little bit about the Project E3 grant, and what we are concerned mainly with is helping folks who are in unusual

situations or have, as we mentioned before, a specific population who has needs that haven't been addressed yet. For instance, some of the populations that we help are folks who live in rural or remote communities. Sometimes they are eligible for benefits, but they don't always have the supports in place to be able to access their benefits. So what Project E3 is trying to do is to try to help reach as many people as possible and get them the vocational rehabilitation and community support resources that they need to be able to take advantage of the VR resources. So we welcome anyone who would like to to join our community of practice, to get involved on our website, to point us to different resources that you find helpful. So that's kind of a little pitch for that. But basically, it's for you. It's to help out if you have something in specific that you are dealing with that is maybe a more unusual situation. We encourage people to share our community of practice. It's always nice to find out what your colleagues in other states or other regions are doing. So that's my quick pitch for that.

And I did receive a few more questions, so I think I'll go back to those for right now. One quick question, Molly, it says are there work incentive staff located in local SSA offices? Is that something you know?

>> MOLLY SULLIVAN: It's a great question. There aren't. You know, what you have in local Social Security offices are service representatives who work at the front desk and are fielding everything from how do I order a new Social Security card to how do I apply for benefits, and then behind that front desk are claims representatives, and there are claims representatives that oversee SSA claims and those who oversee the Title II disability claims like SSDI. And those claims representatives know the work incentives for each of their benefits, but they are really only available for the beneficiaries that are on their caseload. And you know, I think just in terms of the scheme of things, most people don't just receive a benefit from Social Security, and so while Social Security staff can answer questions related to the SSI or the SSDI claim, they are not going to be able to answer questions about Medicaid or subsidized housing or SNAP, the newest name for food stamps. So local offices are not a place you are going to find that holistic sort of work incentive counseling service.

>> HEIDI DECKER-MAURER: Thank you very much, Molly. We have some pretty involved questions. I am trying to see if I can summarize some of these a little bit because they are a little bit complicated, and given the nature of the presentation, it is more of a general presentation, so I am going to throw these out there, and we will see if there are -- if there is a way that you can point people in the right direction towards resources that can help them.

One question states that beneficiaries sometimes are blocked in progressing from contemplation to action. I am assuming that

means, Mark, that means that folks aren't able to make good decisions about looking for work because they don't have enough information about work incentives and the interactions of work earnings and benefits. He feels that WIPA isn't always available to help people make well reason informed decisions. He asks could this change in the future to encourage more people with disabilities to pursue employment based on well-informed decisions? That's something that is central to some of the work with Project E3. Molly, do you have any advice for Mark or any direction you could point him in?

>> MOLLY SULLIVAN: Well, I think, you know, the fact that there's this recognition that work incentive planning services are a critical part of the Vocational Rehabilitation process is wonderful. And I think that the funding to support that is not quite caught up with the recognition of the need for it, I would say. I mean, when I started working in this field as a job developer back in the late '90s, in terms of trying to provide this service, you know, all of the case managers and VR counselors I went to said why would we need this service? We just tell people don't earn over \$500. So it's so fantastic that there's now a recognition that the service can help somebody make a really great, informed choice to work. I would say the challenge right now is that the resources haven't quite caught up to it. So I would encourage -- as I tried to get at a little bit in the presentation, I would encourage you to look around to see if your state has -- if there's any entities in your state that have taken some efforts to build capacity, if the state VR agency is now helping to fund the service in some way, shape, or form, whether it's employees in the agency or contracting out deeper service to an agency. And also, we really are seeing more and more Medicaid agencies building this in as a service that the Medicaid vendors, in particular those providing employment services, can include as a part of their billable services. So I would encourage you to begin to ask around about whether there's other providers that have more capacity to provide services.

>> HEIDI DECKER-MAURER: Thanks, Molly, for addressing that one.

We have another question, and it seems to be somewhat related. The person is asking -- or stating that they have agencies marketing services in their area for contract with DVR. There is a question about clients who want some general information and not necessarily being enrolled with DVR. The question is since DVR charges -- this person has \$800 for private pay for benefits analysis if they are not enrolled in DVR, does the WIPA worker do a full benefits analysis or is it just basic info? Very concerned about sometimes the time it takes to get assigned to a DVR counselor and get someone to connect with them, and that seems to be a common theme that has been brought up in a few of our other webinars too. Sometimes it takes a lot of time for people to be seen.

Do you have any -- an answer to that? Does the WIPA worker do

a full benefits analysis? Do you know if that's something that they do or ...

>> MOLLY SULLIVAN: I would say what's a little tricky for me in terms of answering this question is that there are some differences from one VR agency to another in terms of how they have set up the service, how the service is designed, and how it will be paid, and so in some states, the VR agency is setting up a service -- the work incentives counseling service -- to provide more of a tiered approach to delivery and services, and in other states, it's a -- you know, there's sort of just one set service. So I think that the answer to that question comes to sort of what the state VR agency has decided in terms of how the service is designed. The WIPA projects have a specific way that they provide services that's directed by Social Security, the funder, and so in terms of how services are delivered, it's often directed by the funder, and so if folks have, you know, any issues that they see with the way services are provided and they file like there could be more efficiencies, it really means, you know, checking in with if you are working -- the person you are working with has a VR counselor, passing along a need that maybe the service needs to be designed in a different way. That would need to move up the chain to those who make decisions within the agency or how services are defined.

>> Thanks, Molly. I would like to have Jen on our staff talk about the evaluations and CRC credits for those of you who are interested in that. So Jen, please.

>> Sure. I just want to let you all know that an email is going out tomorrow to everyone that registered with information on how to access the archived version of this webcast as well as the evaluation. You will be able to request the CRC through the evaluation. And that's it.

>> Thanks, Jen. And thanks, everybody, for attend attending. If you found this a particularly informative session, which I believe it was, we are going to have a series of six sessions by Lucy Miller, who is a colleague of Molly's at VCU. She is going to be offering, again, a series of six sessions that will get more in depth on the topics that Molly discussed today, so if you are interested, if you got a notice about this webinar, you will get a notice about those, but if you would like to take a look at the topics again, go to our Project E3 site, click on Webcast, and upcoming webcasts will be listed, and you will be able to look and see what topics Molly will be covering starting April 28 and then for five sessions after that.

So thanks again for your time, and I will bring this meeting to a close. Thank you, everybody.

>> HEIDI DECKER-MAURER: Thanks, everyone.

>> MOLLY SULLIVAN: Thank you.

>> Thanks, Molly.

(End of session)