

Slide 1

California Department of Rehabilitation & the New Ticket to Work Program

November 18, 2010

Presenters:

Abby Medina & Megan Hellam

California Department of Rehabilitation

Social Security Programs Section

Slide 2

Agenda

- Overview of the Rehabilitation Process
- Social Security Administration/Vocational Rehabilitation Cost Reimbursement Program
- Overview of the New Ticket to Work Program
- Partnership Plus and Sequential Services
- New Ticket Status: "In-Use SVR"
- Timely Progress Reviews

Slide 3

Mission Statement

The CA DOR works in partnership with consumers and other stakeholders to provide services and advocacy resulting in employment, independent living and equality for individuals with disabilities.

Slide 4

Authority

Federal Authority:

- Rehabilitation Act of 1973, as amended

- Title 34 CFR
- Rehabilitation Services Administration (RSA)

State Authority:

- CCR, Title 9
- WIC, Div 10, Part 1, Sec. 19000-19356
- California Health & Human Svcs. Agency

Slide 5

CA DOR Stats

- 120,000 cases annually
- One-third or 40,000 SSI/SSDI cases
- 25,000 open SSI/SSDI cases
 - ¼ Psych. disabilities
 - Approx ½ Category 1 & ½ Category 2

Slide 6

Social Security and Work

Social Security Definition for Disability:

- The inability to engage in any substantial gainful activity (SGA) because of a medically-determinable physical or mental impairment(s):
 - that can be expected to result in death, or
 - that has lasted or is expected to last for a continuous period of not less than 12 months

Slide 7

DOR Basic Eligibility Criteria

- A physical or mental impairment that...

- Constitutes or results in a substantial impediment to employment.
- Requires VR services to prepare for, secure, retain or regain employment consistent with unique strengths, resources, concerns, abilities, capabilities, interests & INFORMED CHOICE.
- EMPLOYMENT is the individual's goal.

Slide 8

DOR Presumptive Eligibility

- SSI/SSDI applicants *presumed eligible* for DOR services
- Intent to achieve an appropriate employment outcome
- Ineligibility due to the severity of disability (*clear & convincing evidence*)

Slide 9

Overview of the Rehabilitation Process

DOR LOGO

Slide 10

Flow Chart

APPLICATION-Not Eligible

Closure

APPLICATION-Maybe

Trial Work Experience-Eligible

Level of Significance of Disability-No Closure

Level of Significance of Disability-Yes

Meets Order of Selection-

No, Waitlist

Yes, Develop IEP

Implement IEP

Placement

Stabilized in employment for 90 plus days

No, Unsuccessful, closure

Yes, Successful Closure-post employment services if needed

Slide 11

SSA/DOR Partnerships

- **SSA Demonstration Projects**
 - **(ISSP Grant, Bridges Grant)**
- **Data Exchange**
- **Work Incentives Training**
- **SSA Hiring Initiative**
- **VR Cost Reimbursement**

Slide 12

VR Cost Reimbursement Program

- **Partnership with SSA since 1981**
- **9 months SGA within a 12-mo. period**

- Direct, ACP & Tracking Costs
- Cost Reimbursement ANPRM

Slide 13

Ticket to Work and Work Incentives Improvement Act of 1999 (TWWIIA)

Purpose:

- Provide health care and employment services to individuals with disabilities
- Encourage states to enable beneficiaries to purchase Medicaid coverage
- Provide option of maintaining Medicare coverage while working
- Establish the Ticket to Work and Self-Sufficiency Program (Ticket to Work Program)

Slide 14

Ticket To Work Program Overview

- All SSI/SSDI beneficiaries between ages 18-64 “in cash pay” have a “Ticket” or are Ticket eligible
- DOR = “In-Use SVR” = Cost Reimbursement
- EN = “Ticket Assigned” = Outcome/ Milestone Payments

Slide 15

Ticket To Work Program Overview

- SSA issues beneficiary a “Ticket.”
- Paper Ticket not required for ticket assignment
- Maximus can verify ticket status
 - (866) 968-7842

Slide 16

Ticket To Work Program Overview

Key Players of TTW

- Social Security Administration (SSA)
- MAXIMUS
- CESSI (until 11/30/2010)
- Beneficiaries
- Employment Networks (EN)
- State VR Agencies

Slide 17

Ticket to Work Program Overview

Benefits to Beneficiaries

- Offers choice of service providers for beneficiaries who do not want VR services.
- Offers choice for beneficiaries to receive services from VR and EN *sequentially*.
- Provides ongoing support services to maintain work efforts
- Protection from medical Continuing Disability Reviews (CDRs)

Slide 18

Ticket to Work Program Overview

What Is a Medical CDR?

- Periodic reviews SSA conducts to determine continued eligibility for disability benefits based on a beneficiary's medical or disabling condition
 - Conducted every 1 year, 3 years, or 7 years depending on the expectation of medical recovery

Slide 19

Ticket to Work Program Overview

Benefits to ENs

- Additional revenue source (Outcome/Milestone Payments)
- ENs can use payments however they choose
- ENs can choose to accept or decline ticket assignment from a beneficiary

Slide 20

Ticket to Work Program Overview

Benefits to State VR Agencies

- Provides a new option for assisting beneficiaries to retain & advance in employment after successful VR closure
- Provides another option for beneficiaries whose VR cases are closed unsuccessfully
- Provides an alternative for beneficiaries who are on waiting list when VR is on Order of Selection
- Reduces the need for re-opening cases when beneficiaries need additional assistance after VR closure

Slide 21

Ticket to Work Program Overview

State VR Agency Option

- A State VR agency can choose whether to serve a beneficiary
 - Under the traditional Cost Reimbursement program
- or
- As an EN under the Ticket Program
- *Note: California DOR is Cost Reimbursement only*

Slide 22

What Is Partnership Plus?

State Vocational Rehabilitation (VR)

agencies and ENs can partner to meet the needs of Ticket Holders

- **Old Ticket regulations** – SSA paid for beneficiary success under either the VR Cost Reimbursement (CR) program or under the Ticket program, NOT BOTH
- **New Ticket regulations** – Permit payments to VR under the CR program and to an EN under the Ticket program on behalf of the same beneficiary for the same Ticket in certain circumstances

Slide 23

How Does This Impact Payments to ENs?

- **Increases likelihood**
 - Ticket Holder will continue working
 - VR will receive CR payment from SSA
 - EN will receive Ticket payments
- **When a Ticket Holder's VR case is closed successfully, Phase 1 Milestones are not available to an EN**
 - Ticket Holder already working at Ticket assignment
- **All Phase 2 Milestone and Outcome payments are still payable to EN**

Slide 24

2010 EN Payments-At-A-Glance

OUTCOME PAYMENT METHOD

- **Payment Type-Outcome**

Beneficiary Earning Required After Ticket Assignment

- **Earnings sufficient for "zero" cash benefits status**

SSI Ticket Holder

- Up to 609 payments of \$409 per month
- Total of outcome payments \$24,540.

SSDI Ticket Holder

- Up to 36 payments Of \$711 per month
- Total of outcome payments \$25,596.

MILESTONE OUTCOME PAYMENT

Payment Type-Phase 1

Milestone 1

- Beneficiary earnings required after ticket assignment
 - \$720 per month times 1 month
- SSI Ticket Holder
 - \$1275
- SSDI Ticket Holder
 - \$1275

Milestone 2

- Beneficiary earnings required after ticket assignment
 - \$720 per month times 3 months within 6 months
- SSI Ticket Holder
 - \$1275
- SSDI Ticket Holder
 - \$1275

Milestone 3

- Beneficiary earnings required after ticket assignment
 - \$720 per month times 6 months within 12 months

- SSI Ticket Holder
 - \$1275
- SSDI Ticket Holder
 - \$1275

Milestone 4

- Beneficiary earnings required after ticket assignment
 - \$720 per month times 9 months within 18 months
- SSI Ticket Holder
 - \$1275
- SSDI Ticket Holder
 - \$1275

TOTAL FOR PHASE 1

- SSI Ticket Holder \$5,100.
- SSDI Ticket Holder \$5,100.

Payment Type-Phase 2

Milestones

- Gross earnings at or over \$1,000 (non-blind) per month (SGA)
- Gross earnings at or over \$1,640 (blind)per month (SGA)
 - SSI Ticket Holder up to 18 payments of \$220 per month
 - SSDI Ticket Holder up to 11 payments of \$382 per month

Total for Phase 2

- SSI Ticket Holder \$3960.
- Total Phase 1 plus 2 milestone payments \$9,060.
- SSDI Ticket Holder \$4,202
- Total Phase 1 plus 2 milestone payments \$9,302

Outcome

Earnings sufficient for “zero cash benefit” status

- SSI Ticket Holder up to 60 payments of \$220 per month
- SSDI Ticket Holder up to 36 payments of \$382 per month

Total for Outcome Payments Available

- SSI Ticker Holder \$13,200
- SSDI Ticket Holder \$13,752

Total of Outcomes plus Milestone Payments

- SSI Ticket Holder \$22,260
- SSDI Ticket Holder \$23,054

Slide 25

Partnership Plus Flow Chart

- Beneficiary goes to VR and applies for services
- Beneficiary and VR develop IEP for Cost Reimbursement case. VR notifies MAXIMUS to place ticket into “In-Use SVR” status
- VR provides services as outlines in IEP.
 - VR may purchase services from vendors who are approved EN’s
- VR closed case and notifies MAXIMUS after beneficiary has been stabilized in employment for at least 90 days
- At case closure, VR counselor advises beneficiary of option of assignment of Ticket to an EN for ongoing support services.
- Beneficiary connects with EN to discuss need for ongoing support services
- EN and beneficiary develop IWP that is sent to MAXIMUS for approval which triggers Ticket assignment to that EN.
- EN provides services as outlined in IWP to assist beneficiary in maintaining employment.
- EN submits for Phase 2 Milestone payments based on beneficiary attaining SGA level earnings.
- Beneficiary and EN continue working together.
- EN submits for Outcome payments when disability checks stop.

VR submits CR claim when beneficiary earns above SGA for 9 months within a 12 month period.

VR and EN get PAID! Beneficiary increases his or her self-sufficiency!

EVERYBODY WINS!

Slide 26

Partnership Plus

EN Outreach Efforts

- **DOR Considerations**
 - EN presentations at DOR Unit Meetings
 - EN presentations at DOR group orientations
- **Reinforces the idea that consumers will have ongoing support and services after DOR case is closed**

Slide 27

CA DOR TTW Procedures

- Presumptive Eligibility
- DOR sends monthly IPE & Closure data files to Maximus
- Maximus moves assignable tickets to “In-Use SVR” status
- DOR provides services per approved IPE
- After DOR case closure, Maximus makes ticket available for assignment to EN

Slide 28

CA DOR TTW Procedures

“In-Use SVR status”

- Medical Continuing Disability Review (CDR) is suspended
- This status is triggered when beneficiary signs IPE and VR notifies Maximus via e-data transfer file
- Ticket must be unassigned from EN in order for Maximus to code case as “In-Use SVR” status
- Ticket is available for assignment to EN when VR case is closed successfully or unsuccessfully

Slide 29

CA DOR TTW Procedures

TTW Statement on consumer’s signed IPE

Ticket to Work (TTW) (Applies only to SSI/SSDI) :

- I am an SSI/SSDI beneficiary. My DOR counselor has provided me with information regarding "Timely Progress" and I understand that I am required to meet the Timely Progress benchmarks in order to be protected from SSA's medical Continuing Disability Reviews (medical CDRs). If I was initially referred by an Employment Network (EN) to DOR, I understand that my counselor will refer me back to this EN at the end of DOR services. I understand that I have the option to assign my ticket to an approved EN of my choice for follow-up, retention, and additional support services.

Slide 30

CA DOR TTW Procedures

- **DOR Counselor role at DOR Case Closure**
 - Inform consumer that medical CDR suspension will extend for 90 days after DOR case closure
 - Encourage ticket assignment to EN to continue medical CDR suspension and obtain retention & ongoing support services
 - Refer consumer back to EN who initially referred consumer to DOR
 - Inform consumer about Maximus website www.yourtickettowork.com EN Directory

Slide 31

Maximus Coding Delay

There is an inherent delay in the posting of a beneficiary's name back on the list of beneficiaries with Tickets available for assignment

- VR closes cases throughout the month
- VR submits 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

Slide 32

Referral from EN to VR

- Vocational Agency referral form

Referral from VR to EN

- Referral to Employment Network Form

Slide 33

Timely Progress Review (TPR)

- SSA's way to assure ticket holder progress towards employment
- Expanded under new regulations effective July 2008
- Review conducted at the end of every 12-month period
- Failure to demonstrate timely progress does not end Ticket use, just the beneficiary's continued medical CDR suspension

Slide 34

Timely Progress Review

Guidelines

- Work or earnings requirements
- Educational or training requirements
- Combination

Copy of TPR guidelines at Maximus' website: www.yourtickettowork.com

Slide 35

Timely Progress Review

Process

- MAXIMUS checks SSA's earning records
- If earnings meet TPR guidelines, no further actions are taken
- If earnings do not meet TPR guidelines, the beneficiary is contacted
- November 2010 – Maximus will begin sending TPR notices to beneficiaries with tickets Assigned to EN or "In-Use SVR" with VR

Slide 36

Timely Progress Review

Letter

- First 12 month Progress Review Requirements form

Slide 37

Timely Progress Review

Form Returned w/in 30 days

- **Guidelines met**
 - **Service provider notified through bi-weekly status report**
- **Guidelines not met**
 - **Second notice sent**
 - **If not returned, CDR protection lost**

[mCDR protection can be reinstated if beneficiary catches up on TPR guidelines later]

Slide 38

Online TPR Presentation

- A complete, self-paced TPR PowerPoint presentation is available on Maximus website at www.yourtickettowork.com
 - Click on Timely Progress Reviews under “EN-VR Education-Training”
 - Click on Timely Progress Presentation

Slide 39

A note on ENs who are DOR Vendors

Being an EN does not impact “Vendor” relationship with DOR.

- Example: Inspirations is a fee-for-service DOR vendor and also an EN. RC and consumer select Inspirations to provide job skills training & placement services and RC authorizes services. *Inspirations* is providing these services to consumer in a “Vendor” capacity and is paid by DOR. When DOR case is closed, consumer chooses to assign his ticket to *Inspirations*. *Inspirations* is now providing ongoing supports & retention services in an “EN” capacity. *Inspirations* gets EN payments from SSA when consumer reaches certain earnings level.

Slide 40

CHART

SSI/SSDI Beneficiary Employment & Benefits Planning Resources (Center of Chart with all below flowing into)

- SSA Work Incentive Coordinators (AWICs)
PASS Specialist
- Maximus
CESSI (til 11/2010)
BAHS (eff.12/2010)
- Work Incentive Planning & Assistance (WIPA)
- Protection & Advocacy
- DOR, ENs, CBOs, & Partner Agencies
- DB101 Services & Benefits Calculators (www.db101.org)
- Disability Program Navigators (DPNs) at One-Stops

Slide 41

Resources

- SSA's worksite: www.ssa.gov/work
- Maximus website: www.yourtickettowork.com
- Maximus toll-free number:
 - 1-866-968-7842 (v) ; 1-866-833-2967 (tty)
- DOR website: www.dor.ca.gov
- DOR's TTW mailbox: ttwinfo@dor.ca.gov
- DOR's Ticket line: 1-866-449-2730
- Client Assistance Program (CAP):
 - mailbox: Capinfo@dor.ca.gov
 - 1-866-952-5544 (v) ; 1-866-712-1085 (tty)
- www.disabilitybenefits101.org
- www.talentknowsnolimits.info
- www.choosework.net