Evidence-Based Practice Supported Employment
Comprehensive, Individualized Work Incentives Planning

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While this article may be specific to those living in the United States, it is a reflection of taking a broader perspective of a person’s life. In this case, we look at the financial realm, in particular disability benefits, in an attempt to decrease barriers for people to engage in meaningful work.

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Benefits planning or work incentives planning for consumers engaged in supported employment has always been one of the cornerstones of providing effective evidence-practice supported employment service provision. Concern about the potential loss of federal and state benefits if they return to work is a significant barrier for people with psychiatric disabilities (McQuilken, et al., 2003). This “fear” of losing benefits is one of the major barriers that prevent consumers from readily choosing to engage in pursuing a vocational goal or achieving competitive employment.

We know that consumers who are offered and receive individualized benefits planning are more capable of making good decisions about achieving a vocational goal or obtaining competitive employment; and can make informed choices about how to combine earned income with federal/state benefits to maximize their quality of life. The most recent, updated supported employment fidelity scale reflects the importance of comprehensive and individualized work incentives planning by including a fidelity item that measures the degree to which mental health agencies are offering benefits planning to consumers engaged in
supported employment.

The revised fidelity scale indicates that,

“All clients are offered assistance in obtaining comprehensive, individualized work incentives planning before starting a new job and assistance accessing work incentives planning thereafter when making decisions about changes in work hours and pay. Work incentives planning includes SSA benefits, medical benefits, medication subsidies, housing subsidies, food stamps, spouse and dependent children benefits, past job retirement benefits and any other source of income. Clients are provided information and assistance about reporting earnings to SSA, housing programs, VA programs, etc., depending on the person’s benefits.”

Clearly, the fidelity scale details a broad scope of work incentive planning that needs to take place prior to a consumer starting a new job. Work incentives planning, like every other supported employment service, is driven by consumer choice regarding receiving that service. It is important that all consumers are offered assistance in obtaining benefits planning, but it is the consumer’s choice to receive the service.

When consumers decide to obtain work and are referred to supported employment, the employment specialist should offer and then assist those consumers who choose to receive benefits planning to obtain it by someone specially trained to provide it. At this point, it is critical that the employment specialist and the consumer understand how working will affect all the state/federal subsidies and benefits the consumer is receiving. The individuals who generally have the training and experience to provide comprehensive and individualized work incentive planning in Kansas are:

1) Working Healthy Benefits Specialists, see attachment for the specialist serving your area.

2) Community Work Incentive Coordinators, who are certified and have received extensive training; there are only two in Kansas: Margaret Mertz and Bill Mickel. Contact these individuals at Cerebral Palsy Research Foundation (CPRF), 1-316-688-1888. CPRF is the agency that has been awarded the contract by SSA to provide work incentive planning and outreach in Kansas.

The Benefits Planning Query (BPQY) is also a useful tool that can assist both service providers and consumers gain an understanding of the federal benefits that consumers currently have and the status of those benefits, i.e., how many trial work periods have been used, how much the consumer is currently receiving in “cash” benefits, etc. Every SSI/SSDI beneficiary is entitled to receive this report free of charge from the Social Security Administration (SSA). The documents attached to this article detail the process by which an SSI/SSDI beneficiary (or someone who has been provided consent by the consumer) can obtain the report. Obtaining the information in the BPQY is a good first step in helping consumers understand what federal benefits they are receiving. It does not however, take the place of individualized and comprehensive benefits planning provided by one of the qualified persons described above.

In addition to the BPQY, there is information contained in the PDF file (attached) to obtain consumers’ earnings information. There is a charge for obtaining earnings information which is detailed in the information provided. However, employment specialists might try to contact
the manager of the local SSA office, explain what you do as an employment specialist and what you need the earnings request for. Ask the SSA manager if there is a possibility of no charge or a reduced charge for the earnings report.

Helping consumers obtain comprehensive, individualized work incentives planning before starting a job and when making changes in work is a critical aspect of supported employment. An employment specialist should be offering assistance with work incentives planning, helping the consumer get that assistance through a person who has expertise and knowledge in benefits planning, and using tools such as the Benefits Planning Query to help consumers make informed choices when returning to work or making changes in their work situation.

Resources:


http://www.ssa.gov/redbook/


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