



*S*upporting Career Development and Employment

A Skill Development Practicum



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ACKNOWLEDGEMENT

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Materials contained within have been reviewed for accuracy. However, the opinions about programs administered by the Social Security Administration and other federal/state agencies expressed in these materials are those of the authors, and do not necessarily reflect the viewpoint of these agencies. The information, materials and technical assistance are intended solely as informal guidance and are neither binding on any agency with implementation and/or administrative responsibilities.

AGENDA

8:30 AM	Large group review of SSD/SSI Work Incentives
9:30 AM	Case Study (small group work)
10:15 AM	Break
10:30 AM	Case Study (continued)
11:00 AM	Large group Case Study discussion
11:30 AM	Supporting the Choice of An Employment Provider
12:00 PM	Lunch
1:00 PM	Bonus Questions (small group work)
2:15 PM	Break
2:30 PM	Large group Bonus Questions discussion
3:15 PM	Question & Answer Period
3:30 PM	Evaluations
3:45 PM	Farewell

SUPPORTING THE EMPLOYMENT DECISION MAKING PROCESS

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Understanding Interest, Preferences, Abilities and Support Needs

Once an individual has made a decision to pursue work, that person must take into consideration several types of information to aid them in making the most informed decisions in the employment process.

1. Their unique interests, preferences, abilities and support needs
2. Impact of their choices on their financial well-being and independence
3. Individual service provider capacities to best meet their unique set of employment needs
4. A comprehensive work plan clearly outlining their preferred employment indicators, goals and objectives
5. Quality assurance strategies for evaluating services and supports provided and degree to which goals and objectives were met

Prior to selecting a provider to deliver employment services, an individual must consider developing a profile of what their preferred employment outlook is based on their interest, preferences, abilities and support need. To begin developing this profile, an individual should first consider what they are most interested in doing for work—their preferred field of interest (e.g. computer technology, customer service, health and human services, etc.). Next they should look at what types of environments they are most interested in performing this work in. Let's say for example a person expresses a strong interest in computer technology—specifically data entry and materials development. That type of work can be done in a variety of settings, a college setting, a factory, doctor's office and array of other locations. Selecting the setting in many cases is dictated in some of the other employment indicators. Does the person want a fast-paced environment, low stress, high occurrence of interaction with co-workers, hours/schedule, types of benefits, pay, etc. These preferences dictate the type of environment that might be most conducive to the individual's overall level of job satisfaction. Getting an understanding of this up front in the employment planning process is critical and will assist the individual in making a more informed choice as to what provider is best equipped and has the most experience placing individuals in jobs that best match their profile.

A second important aspect is the person having an understanding of how their unique skill set has the potential to make them successful in the job of their choosing. While often people know what it is they do well, often we don't take the time to understand what our unique and specific needs for support are. For example, if the individual doesn't understand the impact of the stemming functional implications of their disability on work, they might want to consider a provider who can assist them in learning more about themselves as an important first step in developing their work plan. If the provider does not have specific expertise in assessment or evaluation, the individual might want to consider another provider that does. In the case of someone who understands their capacities and ongoing needs for very specific, specialized support they might want to consider a provider or group of providers that can not only provide vocational rehabilitation counseling, job development and placement services but also specialized therapies needed such as speech language pathology, occupational therapy, cognitive therapy, etc. For someone who just needs modifications to a vehicle for transportation to and from work to achieve their specific work goal, they might want to consider locating a provider with resources to cover those associated costs or a provider who is knowledgeable about SSA's work incentive provisions and can assist them in writing a Plan for Achieving Self Support.

Impact of Choices on Financial Well-Being and Independence

Most individuals considering pursuit of employment are doing so to increase their financial well-being and independence. It is a critical step in the informed decision making process to make sure that beneficiaries understand how their benefits will be impacted by earnings and employment. These benefits not only include Supplemental Security Income and Social Security Disability Insurance but also housing subsidies, Temporary Assistance for Needy Families, state Medicaid, Unemployment Insurance, Worker's Compensation and other state benefits. Benefits Planning, Assistance and Outreach Projects (BPA&O) around the country can provide major assistance in helping beneficiaries to understand this impact. A benefits practitioner within a BPA&O Project can help the beneficiary understand the specific dollar amount of earnings needed to off-set the loss of benefits across an array of programs as well as other benefits the person might need to have such as health care. This dollar amount, coupled with other employment benefits needed, provides an important benchmark or profile for the potential service provider and beneficiary to work with as they consider annual earnings a job must generate to ensure the person's financial well-being and increased independence.

Supporting the Employment Decision Making Process

Selecting a Service Provider

Once an individual has a basic understanding of what their unique interests, preferences, skill set and need for employment supports are, the process of selecting a provider begins.

It is important for the beneficiary to consider several variables as providers are being interviewed and considered:

- Does the provider specialize in the types of supports needed?
- Does the provider have a proven track record working with other individuals with the same type of disability?
- What is the provider's track record--outcomes working with beneficiaries and recipients with disabilities in general?
- Does the provider have references available?
- What experience does the provider have working with local businesses and other community resources?
- Does the provider's staff live locally and/or do they have a local office?
- How do they select staff to work on specific cases and does one staff person work with their customer throughout the entire employment process?
- What if a need for support arises? Who, where, when and how to I contact someone?
- What is the retention rate of the provider's staff?
- If not satisfied with the supports and services being provided, what is provider's quality assurance process?
- Does the provider have data on the types of jobs, wages and benefits they have assisted other consumers in obtaining?
- What percentage of customers served have obtained their goals and objectives?
- Of those that did not, why not?
- What percentage of customers placed are still working six months post-placement?
- Of those not working six months post, why aren't they?
- How will the provider respond if for some reason I do not respond well to services and supports provided? Will I be terminated?
- What interim supports and services does the provider offer in between job placements, during lay-offs, or non-work hours?
- What is the average length of time from when the provider receives a referral till a person is working?
- How does the provider decide what types of services and supports a customer will need?
- Who makes the decision as to whether or not to accept a specific job?
- What happens if the job developed turns out to not be a job I am interested in?

Supporting the Employment Decision Making Process

- Are the provider's values and mission consistent with the goals being considered by the customer?
- What strengths does the provider have? Specific human resources? Particular areas of expertise?
- Does the provider offer transportation? If not, do they help coordinate and plan for transportation? Who pays?

Remember, it is the customer that has choice of who they select as a service provider and/or deposit their "Ticket" with. As with shopping for a new car, it is important to shop around for the best deal with the most features.

Developing a Comprehensive Plan for Work

Evaluating the services and supports being provided starts with ensuring that the customer's individualized work or service plan incorporates all the important elements of services to be provided as well as the preferred employment outcome. This service-planning document serves as a contract between the customer and the service provider. If it has not been agreed to by both the service provider and the consumer and incorporated into the plan than it becomes difficult to evaluate. For example, if the individual and the service provider have identified that a full-time job in the field of computer technology is the preferred outcome that should be built into the person's work plan. That will help guide the service provider as they are doing job development and provide them a benchmark to measure jobs they are developing against. If the salary must be at a certain level to off-set loss of benefits, then that should be built in as well. Let's say an individual is going to lose their subsidized housing within a year of becoming employed at a certain level, that individual's plan should also identify strategies for supporting that individual in locating alternative housing or at a minimum a referral to a community resource to assist with this.

Quality Assurance Strategies to Evaluate Services and Supports Provided

A final important consideration is that of quality assurance. Of course every customer is going to want to be satisfied and content with the services and supports being provided. Should a customer not be satisfied, that person does have a right to terminate services with the original provider and solicit services from another provider. However, prior to making this decision, the individual should work with the provider to resolve any differences and make sure they understand how they are attempting to support the customer's movement toward employment

CASE STUDY

Trial Work Period, Extended Period of Eligibility, Expedited Reinstatement of Benefits

Jerry Barnes:

- Age 41
- Lives with brother and brother's two children
- Awarded Social Security Disability Insurance (SSDI) in 1990 based on severe back injury suffered as construction worker
- SSDI monthly check = \$520 (assume same amount throughout exercise)
- In 1997, began treatment for depression; has continued to see mental health counselor one time per month through the present
- States that he likes working with his hands, loves construction work, but would be willing to learn a new trade if, at some time, he's unable to continue this work.
- Presents himself well; would probably be good at anything that involved working with the public (i.e.; doing estimates, working in a lumber company, tool company, etc)
- Needs to continue seeing his doctor, therapist, taking meds, and monitoring back pain regularly. Also needs to continue having health insurance on an uninterrupted basis

First Attempt at Return to Work; Relapse

- 1993 ... returns to work part-time in lighter construction work
- 1/93 to 6/93, earns \$600 gross per month
- In late 6/93, Jerry re-injures back and must stop working
- Does not work during remainder of 1993, nor does he work during 1994-97 period
- In early 1998, he begins attending mental health counseling sessions, suffering from severe depression

Work Activity 1998 to 2005¹

1998:

Works 10/98 to 12/98 ... gross earnings of \$650 per month

1999:

Works 1/99 to 12/99 ... gross earnings of \$680 per month

¹ Please assume that Jerry does not have any impairment work expenses or subsidies during the periods in question.

2000:

Works 1/00 to 12/00 ... gross earnings of \$720 per month

2001:

Works 1/01 to 4/01 ... gross earnings of \$720 per month

Late 4/01, he is laid off

5/01 to 10/01 ... does not work; eligible for unemployment insurance benefits of \$90 per week

11/01 to 12/01 ... gross earnings of \$1,000 per month

Please assume the 2004 FBR amount for the following periods:

2002:

1/02 to 12/02 ... gross earnings of \$1,000 per month

2003:

New Year's Day ... Jerry aggravates back taking down Christmas tree; is flat on his back for several days.

1/03 to 12/03 ... does not work, receives no wages

Please assume 2004 SGA/TWP amounts for the following periods:

2004:

Jerry returns to work on lighter schedule

1/04 to 12/04 ... gross earnings of \$500 per month

2005:

1/05 to 12/05 ... gross earnings of \$1,000 per month

QUESTIONS

Jerry's First Trial Work Period (TWP)

1. When did Jerry work his first TWP month?
2. List the TWP months Jerry worked during the years since he first went on SSDI?
3. When did his TWP end?

Jerry's First Extended Period of Eligibility (EPE)

1. When did Jerry's EPE begin?
2. List the beginning and end months of the EPE:

3. During the EPE
 - a. During what months was Jerry entitled to an SSDI check?
 - b. During what months was Jerry not entitled to an SSDI check?
4. When the EPE ends, what is the status of Jerry's SSDI eligibility?

Expedited Reinstatement (EXR) of SSDI Benefits

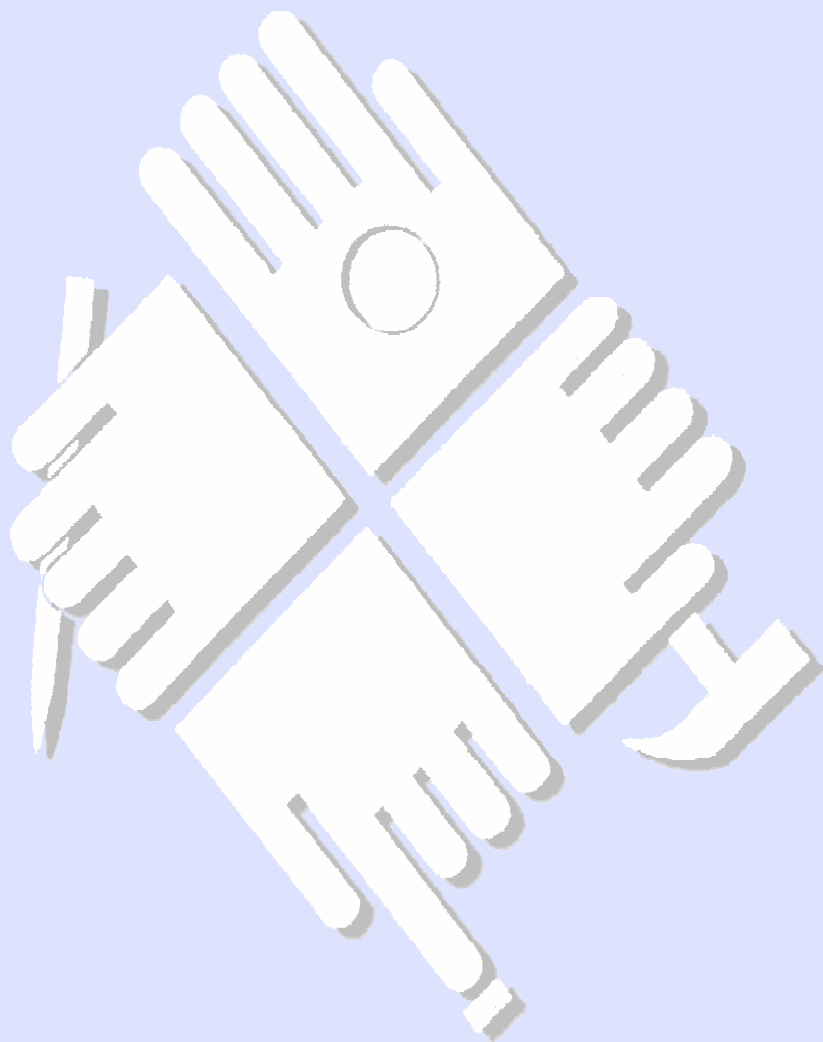
1. Was Jerry, at any time, eligible for EXR?
2. When? What steps did he need to take? Explain what would happen.
3. After he is reinstated, what happens in the months that follow?
4. Will Jerry ever get a second TWP and EPE?

BONUS QUESTIONS

1. What is the impact on Jerry's situation when he becomes eligible for unemployment benefits?
2. The facts do not mention Supplemental Security Income (SSI). Might Jerry ever have eligible for SSI (do not consider state supplement amount)? If so, how would any of the periods of work have affected his SSI/Medicaid?
3. Now, assume that you learn that Jerry actually had subsidy of about \$75/month and an IRWE of \$200/month during the period of 1998-2005. Still assuming that he receives some SSI, also, how would this change you conclusions above?
4. Write up scenarios for Jerry, depicting what he can expect, creating at least 2 options (with and without IRWE and Subsidy). Making sure to depict the level of earnings needed to offset loss of benefits.
5. What type of counsel might you give Jerry re: using his Ticket to engage the services of an EN to get into a different line of employment that would offset the loss of his cash benefit amount for his SSDI and SSI, even if this subsidy and IRWE amounts stay the same (ie, career ideas, resources to check into, questions to ask of potential EN's)?
6. What considerations might be important for Jerry to consider as he selects a service provider?

WORKSHEET

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