

worked with his treatment team on discharge planning. That planning included benefits planning, skills training and a discussion of potential employment opportunities. After completing the discharge planning process, the initial step in that process required a benefits plan and discussion of vocational options. As a result, a referral was made to the BPAO project for this assistance.

As can be seen by the examples cited above, the cooperative working relationship of the MABS members allows each project to focus its efforts on what it does best. This allows for each project to avail itself of the services of the other in order to allow itself to provide more services to beneficiaries.

Joint Training Opportunities

An important aspect of providing accurate and complete information about public benefits is to continually provide training opportunities to all MABS members. Professional development has been an integral component and focus of MABS. The membership of MABS regularly proposes training ideas and needs based upon their daily work experiences with beneficiaries and the issues and challenges imposed by each. Using existing relationships MABS has in the service provider community, members are able to quickly identify knowledgeable presenters. For example, MABS has coordinated presentations regarding subsidized housing, the Food Stamp Program, overpayments, the Medicaid Buy-In program, and others. Training resources have been drawn from the Disability Law Center, the Massachusetts Law Reform Institute, Greater Boston Legal Services and the state's Medicaid and Transitional Assistance staffs. Training presentations are accompanied by associated resource materials.

Cooperative Efforts

MABS has collaborated on special projects, designed to highlight and market the services we provide. One such project involved an SSA Pilot Project. MABS targeted their outreach efforts to Ticket to Work beneficiaries from underserved populations in our respective service areas. Mass mailings were conducted each month over the course of the 12 month life of the pilot project. Some 2600 letters

and informational pamphlets were sent to the target beneficiary population using zip code information gathered from legal services offices across Massachusetts.

Another joint project is under way to publish a Benefits Planning Calendar. This tool will be presented to beneficiaries during the benefits planning process, so that they may easily record earnings, important dates, meetings and contact information pertaining to their public benefits. Helpful hints, reminders and basic information regarding the SSA Programs and Work Incentives will also be included. The Benefits Planning Calendar will provide a simple, helpful means of collecting and storing work related information needed by the beneficiary and SSA to reach proper determinations concerning the beneficiary's benefits claim.

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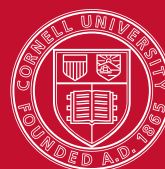
This is one of a series of articles that have been reviewed for accuracy by the Social Security Administration (SSA), Office of Employment Support Programs. However, the thoughts and opinions expressed in these materials are those of the authors and do not necessarily reflect the viewpoints or official policy positions of the SSA.

Contact Information

Cornell University
School of Industrial and Labor Relations
Employment and Disability Institute
201 ILR Extension
Ithaca, New York 14853-3901

t. 607-255-7727
f. 607-255-2763
tty 607-255-2891
ilr_edi@cornell.edu

www.edi.cornell.edu



Cornell University
School of Industrial and Labor Relations
Employment and Disability Institute

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Promising Practices

Creating Model Partnerships to Promote Employment of People with Disabilities

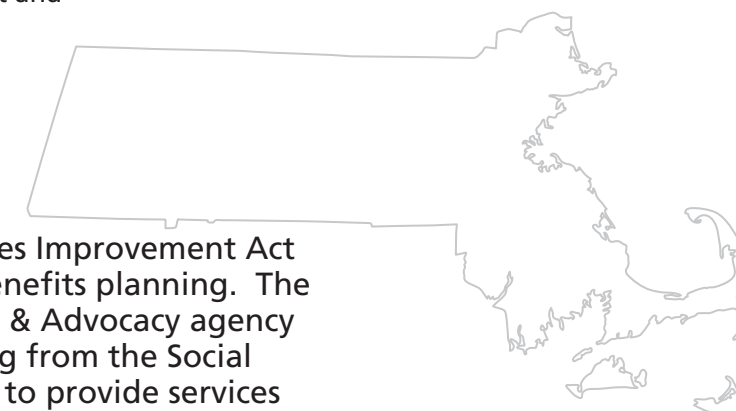
Massachusetts Association of Benefits Specialists

Ray Cebula, Extension Associate, Employment and Disability Institute, WISC

Introduction

The Ticket to Work and Work Incentives Improvement Act provided funding for advocacy and benefits planning. The Disability Law Center is the Protection & Advocacy agency for Massachusetts and receives funding from the Social Security Administration (SSA) in order to provide services under the Protection and Advocacy for Beneficiaries of Social Security Program. Project IMPACT and BenePLAN are the two SSA-sponsored Benefits Planning, Assistance and Outreach Projects providing benefits services in Massachusetts. The three programs began working together in 2001, shortly after the SSA funds were released.

By joining forces and using skills unique to each organization, the Protection and Advocacy for Beneficiaries of Social Security (PABSS) and Benefits Planning, Outreach, and Assistance (BPAO) programs have created a seamless web of planning and legal services for their clients. Massachusetts can hold itself up to the nation as a model of cooperation in the provision of high quality benefits planning and legal services to Social Security Disability Insurance and Supplemental Security Income beneficiaries who wish to plan for their entrance into the work force but face barriers to employment along the way.



Massachusetts

The Massachusetts Association of Benefits Specialists

The Massachusetts Association of Benefits Specialists (MABS) is a collaboration of the state's BPAO and PABSS grants. The mission of MABS is to maximize the effectiveness of the three grants by leveraging resources, partnering and sharing information and ideas.

The staff of Project IMPACT, BenePLAN and the Disability Law Center realized very early in the grant cycle that there would be more requests for benefits planning and legal assistance than there were benefits specialists and legal advocates to accommodate them. The group formed MABS to address this issue and figure out ways to efficiently serve the greatest number of SSA Beneficiaries while providing the highest quality legal and planning services possible. The following are examples of how MABS has collaborated to improve the overall capacity of BPAO and PABSS in Massachusetts.

The List Serve

The membership of MABS strives to make current information regarding SSA's Programs and Work Incentives available to each other on an ongoing basis. The primary vehicle for sharing this information has been accomplished through the use of a list serve. As questions arise, MABS members are able to post the questions to the group as a whole. Responses are posted by other MABS members having the information sought by the poster. The result is that all members are able to benefit from the answers, which result from the posted dialogue. MABS not only discusses SSA Programs and Work Incentives but also other public benefits issues of importance to the lives of their clients. Issues related to Medicare/Medicaid, housing, TANF, Foods Stamps etc. are frequently brought to the group by MABS members.

In order to give the list serve's questions and answers greater utility to its members all issues have been catalogued by topic area. Currently, more than 62 separate categories have been established and cover a wide variety of work incentive related information including work incentives and return to work issues facing beneficiaries of cash and housing benefits

programs. List serve questions and answers are also archived on the list serve, for future reference, by all MABS members.

Example List-Serve "Discussion"

How many Trial Work Periods is one eligible for? I understand that under EXR you become entitled again after 24 months.

I'm still a little fuzzy on if someone goes off SSDI and then does a new application. At one time I thought you had to be made eligible under a different disability. My client went off benefits for 2 years, and reapplied last year and is back on benefits again. Same disability. Is he entitled to a new TWP?

The person you describe is eligible for a new TWP. When a person goes off the rolls, reapplies, and goes back onto the rolls (whether it is a new disability or the previous disability), the person receives a new TWP once he or she has received the final determination. When a person goes back onto the rolls through the EXP process, the disability designated for eligibility must be the same as before, and the person must receive 24 months of disability payments (SSI or SSDI) before he or she is entitled to a new TWP.

FYI everyone - The POMS section at DI E13010.035 provides a good explanation of the rules about when an individual is entitled to a trial work period in a second period of disability. It is available in the POMS section at www.ssa.gov, but without the specific citation, it can be a little hard to find.

Cross Program Referrals

A streamlined mechanism for referring beneficiaries across programs was put in place and assists beneficiaries in accessing services from the appropriate project. Services that PABSS and BPAO projects are required and able to provide are known by all MABS members. When BPAO staff receive a referral, which would be better served by the PABSS a simple contact to the PABSS office can be made. The same is true when referrals are made from the PABSS to the BPAO projects. For referrals to the PABSS project a memorandum of understanding was prepared, and provided to each BPAO project, outlining the program priorities and issue areas that can be handled for ben-

eficiaries. This memorandum was prepared to eliminate sending beneficiaries on a wild goose chase for services.

In many instances the staffs of the BPAO projects and the PABSS advocates will work cooperatively to resolve a beneficiary issue. In these cases, each project uses its own, unique skills to provide assistance to the beneficiary. For example:

A BPAO benefits specialist referred a 50 year old woman to the PABSS project because she was having problems with the housing authority's calculations of her monthly rental subsidy. In the course of exploring this issue, PABSS discovered that she was receiving less SSI than was appropriate. The beneficiary suffered with chronic mental illness and had received SSI for many years. Nevertheless, she had been able to successfully attend classes at a local community college for the past 3 years. During the school year, she has received federal work study funding and during the summer break she has had a part time job with the college and received regular wages. To calculate her SSI eligibility and benefit payment, SSA had been applying the regular SSI earned income deductions to all of her income when, in fact, the work study money was excludable under the federal regulations. Further research confirmed that "all student financial assistance received under Title IV of the Higher Education Act of 1965, or under BIA student assistance programs, is excluded from income and resources, regardless of use." As a result, PABSS determined that this beneficiary had been underpaid by SSA for her entire community college career.

PABSS provided the beneficiary with a copy of the Programs Operations Manual System (POMS) provisions and instructed her to obtain verification of her receipt of a federal work study grant from the college. With a little encouragement, and support from both PABSS and BPAO, she was able to take the verification and the POMS provision to her local Social Security office and requested a recalculation of her SSI payments for the period in question. After providing the information to her local SSA office she received an underpayment award of the SSI that should have been paid. Later, the housing authority also determined

that the federal work study is not countable for rent calculations and reduced her monthly housing cost.

In a second example of cooperative work for a beneficiary's benefit a BPAO staff member had been working with a beneficiary who had been overpaid approximately \$63,000. The beneficiary was a 60 year old man with mental retardation who had successfully returned to work at a local restaurant. According to his employer the beneficiary was a great employee. A social service agency had been struggling to informally assist this beneficiary in resolving the overpayment for some time without success. The social service agency referred the beneficiary to a BPAO project for assistance. After making initial attempts to assist the client, a joint meeting, including the beneficiary, the social service worker, the BPAO staff member and a PABSS advocate was scheduled. During the meeting it was quickly revealed that the beneficiary had made several attempts, via his social worker, to report his work activity and income to the local SSA office. Further attempts by the BPAO to make similar reports were also unsuccessful. Further, this client was impeded in his ability to independently report his work activity because of his mental impairment. Efforts to resolve the issue with SSA had continued for a significant period of time without result.

After considering remaining options, the PABSS advocate assisted the beneficiary in the filing of a Request for Waiver of the overpayment and submitted the appropriate supporting documentation on the beneficiary's behalf. The waiver was granted very shortly after being submitted.

While it often occurs that a beneficiary is referred to the PABSS project for legal assistance when efforts to resolve matters informally have been unsuccessful, referrals are also made by the PABSS advocates to the BPAO projects. In one such instance, PABSS referred a beneficiary with a psychiatric disability to the BPAO project for information about work, his benefits and his vocational rehabilitation options, including the Ticket to Work program. The beneficiary had resided in a state facility for some time and PABSS staff had