

Utah Work Incentive Initiative

**“Providing Benefits Planning and
Assistance to Social Security Disability
Beneficiaries Seeking Employment”
Survey Results**

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Introduction

In 2000, the Social Security Administration (SSA), as part of the Ticket To Work and Work Incentives Improvement Act (TWWIIA), awarded cooperative agreements to organizations in every state in the nation to develop Benefits Planning, Assistance, and Outreach (BPA&O) projects. The purpose of the BPA&O projects is to provide Social Security beneficiaries with disabilities access to benefits planning and assistance services, with the goal of enabling them to make informed choices about how work will affect their Social Security Disability benefits, as well as other federal, state, and community supports they receive. The Social Security Administration also contracted with several universities—Cornell, Virginia Commonwealth, and the University of Missouri at Columbia—to provide technical assistance and training to states' BPA&O Benefits Specialists on SSA's disability programs and work incentives, the Medicare and Medicaid programs, and to other federal work incentives.

In Utah, the BPA&O program, which began in October 2000, is administered by the Utah State Office of Rehabilitation (USOR) and is jointly funded by SSA and the Utah Governor's Council for People with Disabilities. Currently, statewide BPA&O services are provided by three SSA-trained USOR Benefits Specialists, who serve different disability populations. One Benefits Specialist works at the Department of Workforce Services (DWS) with individuals who are receiving Temporary Assistance for Needy Families (TANF). Another works specifically with individuals who are newly determined disabled, through the state's Disability Determination Services. The third Benefit Specialist works specifically with individuals receiving Social Security benefits.

The Utah Work Incentive Initiative held a day-and-a-half long retreat in June 2002 to examine the need for a coordinated, statewide system of benefits planning and assistance services in Utah. Representatives from numerous agencies and organizations that provide BPA&O services to individuals with disabilities were invited to participate in the retreat, including Mental Health, the Division of Services for People with Disabilities, SSA, USOR, DWS, the Department of Health, the Disability Law Center, Centers for Independent Living, and private provider organizations, and members—including consumers—from the UWIN Work Incentives work group. The proposed objectives for the retreat included:

1. Achieving consensus on the need for a coordinated, statewide system;
2. Identifying the values that would drive the system;
3. Determining what standards would be included in the system, i.e., certification, education, continuing education, quality assurance, ethical issues, and target population;
4. Determining how the system would be structured, i.e., statewide, common database, common policies and procedures, agencies and organizations involved;
5. Determining a referral process to benefits planning and assistance services;
6. Identifying resources that would be needed to implement and operate the system; and
7. Recommending "next steps."

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Participants at the retreat felt that before identifying the need for training, setting standards, and developing a referral process for BPA&O services, it was key to understand which organizations in the state were providing assistance—not just the level but also the quality of service—to Social Security Disability beneficiaries currently. Thus a recommendation from the retreat was to undertake a comprehensive survey of agencies and organizations providing BPA&O services as the next step prior to further discussion of a statewide benefits planning system.

Methodology

Data Collection.

In August, the benefits planning and assistance survey was mailed out with a cover letter (see Appendix A, page 24) to a purposive sample of 99 service provider organizations across the state. These organizations were selected based on three criteria: (1) they were known to be already providing some level of benefits planning and assistance services to individuals with disabilities; (2) they had expressed an interest in receiving BPA&O training through UWIN and/or the USOR BPA&O program; and/or (3) they had an established working relationship with a state agency as a service provider working with individuals with disabilities. A complete list of the organizations that received a survey is included in Appendix B, page 28. Three weeks later, a reminder postcard was mailed out asking organizations that had not yet responded to return the survey. Due to the low response to the postcard, targeted follow-up phone calls were made during the first two weeks of September to several agencies (those thought to be providing benefits planning and assistance services) asking them to complete and return the survey.

Data Analysis

The benefits planning and assistance survey was comprised of a combination of quantitative and qualitative questions. The quantitative questions were analyzed using Statistical Package for the Social Sciences (SPSS) software. Responses to the qualitative questions (see Appendix D, page 33) were reviewed for patterns and themes, then summarized in the findings.

Results

Survey Response Rate

Forty-one of a total of 99 surveys mailed out were returned, for an overall response rate of 41.4%. One of the surveys was returned with a note that the organization was no longer in business, leaving 40 usable surveys for analysis.

Classification of Survey Respondents

To provide a clearer picture of the state of benefits planning and assistance in Utah currently, the 40 survey respondents were classified in terms of where in the state they were located and whether they could be assumed to be providing services to beneficiaries locally or on a statewide-

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basis. Three categories of respondent organizations were identified:

1. Those located along the Wasatch Front, all of which were thought to be providing local services. There were 19 organizations in this “Wasatch Front” category, located in Salt Lake, Davis, Utah, or Weber counties.
2. Those located outside the Wasatch Front, all of which were thought to be providing local services. There were nine organizations in this “Non-Wasatch Front” category, located in Carbon, Box Elder, Cache, San Juan, Uintah, or Washington counties.
3. Those located anywhere in Utah but that were known to be offering services to individuals throughout the entire state. There were 12 of organizations in this “Statewide Organization” category, located primarily in Salt Lake and Utah counties.

This classification scheme will be used throughout the presentation of the survey findings (see Appendix C, page 31, for a list of respondent organizations corresponding to these categories).

Survey Findings

To understand the types of benefits planning and assistance services currently being provided in the state of Utah by organizations that assist Social Security Disability beneficiaries, respondents were asked in Survey Question 1 whether they (1) provided the service to their consumers on-site, i.e., directly, only; (2) provided the service by referring to or contracting with outside organization(s) only; (3) provided the service both on-site AND by referring to or contracting with other organization(s); and (4) neither provided the service on-site NOR by referring to or contracting with other organization(s). The results of this question are presented in two ways: for the entire state (Table 1) and also by geographic area of the state (Tables 2 through 9).

In Table 1, the types of BPA&O services—from Information and Referral to writing PASS plans and IRWEs—currently provided by all 40 respondent organizations are presented. Across the state, Information and Referral (I&R) and Problem Solving and Advocacy (PS&A) benefits planning services are offered by the majority of the organizations (90.0% and 95.0%, respectively) that returned the survey. Most commonly, these services are provided directly and, to a lesser degree, by referring to or contracting with other organizations. In contrast, fewer organizations reported providing the more intensive services—Benefits Counseling, Long-Term Benefits Management, and Follow-Up Services—to the Social Security Disability beneficiaries they serve. Between 40.0% and 45.0% of the organizations said they did not provide any of these three services, either directly or indirectly, to their consumers. In terms of writing PASS plans and IRWEs, beneficiaries were less likely to receive assistance from organizations on-site (35.0% and 40.0%, respectively) than with I&R and PS&A (55.0% and 60.0%, respectively), with approximately 33.0% of all organizations reporting that they offered neither service, on- or off-site.

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Table 1. How Organizations in the State of Utah are Currently Providing Benefits Planning and Assistance Services to Social Security Disability Beneficiaries

Type of Benefits Planning Service	How BPA&O Services are Being Provided:				
	Provide On-Site <i>ONLY</i>	Refer to/ Contract with Outside Organizations <i>ONLY</i>	Provide On-Site <i>AND</i> Refer to Outside Organizations	No Services Provided	Totals
Information and Referral	55.0%	15.0%	20.0%	10.0%	100.0%
Problem Solving and Advocacy	60.0%	10.0%	15.0%	15.0%	100.0%
Benefits Counseling	22.5%	27.5%	10.0%	40.0%	100.0%
Long-Term Benefits Management	32.5%	17.5%	10.0%	40.0%	100.0%
Follow-up Services	35.0%	15.0%	5.0%	45.0%	100.0%
Writing PASS plans	35.0%	17.5%	12.5%	35.0%	100.0%
Writing IRWEs	40.0%	15.0%	12.5%	32.5%	100.0%

In Tables 2 through 9, how the various types of BPA&O services are being provided by organizations in different geographic areas of the state—along the Wasatch Front, by those outside the Wasatch Front, and by those organizations that offer statewide services—is compared.

Table 2 shows how comprehensively all levels of the BPA&O services listed in Question 1 are currently being provided to Social Security Disability beneficiaries by respondent organizations. Ten percent (10.0%) of the 40 respondent organizations did not provide any levels of BPA&O services in any manner to the beneficiaries with whom they work. On the other hand, 25.0% of the 40 respondent organizations reported that they offer comprehensive services, i.e., all levels, to consumers: 15.0% provide them on-site only; 5.0% provide them by referring to or contracting with outside organizations only; and 5.0% provide them both on- and off-site. It can be concluded that the remaining 65.0% of respondent organizations offer between one and six of the BPA&O services in any of the ways listed in Question 1.

Table 2. Comprehensiveness of BPA&O Services Across the State

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<i>How BPA&O Services are Provided</i>	Percentage of Geographic Area			
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=12)	Totals (n=40)
Provides <i>all levels of BPA&O service</i> on-site ONLY	2.5%	7.5%	5.0%	15.0%
Provides <i>all levels of BPA&O service</i> by referring to/contracting with outside organization(s) ONLY	–	2.5%	2.5%	5.0%
Provides <i>all levels of BPA&O service</i> on-site AND by referring to/contracting with outside organization(s)	–	–	5.0%	5.0%
Does not provide <i>any level of BPA&O service</i> on-site OR by referring to/contracting with outside organization(s)	2.5%	7.5%	–	10.0%

Information and Referral Services. Table 3 shows how Information and Referral services are currently being offered to Social Security Disability beneficiaries by the respondent organizations. Across the state, all but 11.1% of non-Wasatch Front and 15.8% of Wasatch Front organizations provide I&R in some manner to consumers. Among Wasatch Front and statewide organizations, I&R is most commonly offered on-site only (57.9% and 58.3%, respectively). About five times as many organizations serving the entire state provide I&R in-house *and* through other organizations compared to those along the Wasatch Front (25.0% vs. 5.3%). Off the Wasatch Front, an equal number of organizations reported that they provide I&R services directly only (44.4%) or provide on-site I&R *and* refer to/contract with outside organizations (44.4%).

Outside organizations to which respondent organizations referred individuals for I&R included the Social Security Administration (SSA) (n=9), Vocational Rehabilitation (VR) (n=5), the Department of Workforce Services (DWS) (n=4), the Division of Services for People with Disabilities (DSPD) (n=2), the Utah Work Incentive Initiative (UWIN) (n=2), the Department of Health (n=1), the Veterans Administration (VA) system (n=1), and “other disability agencies” (n=1).

Table 3. Providing Information and Referral Services

	Percentage of Geographic Area
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Is the service provided by your organization?

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	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=12)
Provides services on-site ONLY	44.4%	57.9%	58.3%
Refers to or contracts with outside organization(s) ONLY	0.0%	21.1%	16.7%
Provides services on-site AND refers to/contracts with outside organization(s)	44.4%	5.3%	25.0%
Does not provide on-site services OR refer to/contract with outside organization(s)	11.1%	15.8%	0.0%
Totals	100.0%	100.0%	100.0%

Problem Solving and Advocacy Services. In Table 4, how organizations reported they provide Problem Solving and Advocacy (PS&A) services is presented. As with the provision of I&R, PS&A services are commonly offered in all areas of the state; only 11.1% of non-Wasatch Front, 15.8% of Wasatch Front, and 16.7% of statewide organizations said they did not provide PS&A to Social Security Disability beneficiaries. Off the Wasatch Front, organizations did not refer to or contract with other organizations for PS&A but either provided services on-site only (44.4%) or offered both on- and off-site services (44.4%). For Wasatch Front organizations, the opposite was true: most organizations usually offered PS&A directly only (68.4%) and some referred the service out only (15.8%). Although statewide organizations provided PS&A in all ways, they most frequently offered it directly only (58.3%).

Outside organizations to which respondent organizations referred individuals for PS&A included SSA (n=6), VR (n=4), DWS (n=3), “other disability agencies” (n=3), DSPD (n=1), UWIN (n=1), and the VA system (n=1).

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Table 4. Providing Problem Solving and Advocacy Services

<i>Is the service provided by your organization?</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=11)
Provides services on-site ONLY	44.4%	68.4%	58.3%
Refers to or contracts with outside organization(s) ONLY	0.0%	15.8%	8.3%
Provides services on-site AND refers to/contracts with outside organization(s)	44.4%	0.0%	16.7%
Does not provide on-site services OR refer to/contract with outside organization(s)	11.1%	15.8%	16.7%
Totals	100.0%	100.0%	100.0%

Benefits Counseling Services. Table 5 shows how respondent organizations currently provide Benefits Counseling services to Utah Social Security beneficiaries with disabilities. In contrast to the provision of I&R and PS&A services, many more organizations—about a third of those off the Wasatch Front and those that serve the entire state, and almost 50.0% from along the Wasatch Front—reported not providing Benefits Counseling to consumers at all. Further, fewer organizations said they offered the services directly only (11.1% non-Wasatch Front, 31.6% Wasatch Front, and 16.7% statewide organizations). Again, compared to the provision of I&R and PS&A services, the approach of offering a combination of on-site/off-site services for Benefits Counseling remained constant (22.2% non-Wasatch Front, 0.0% Wasatch Front, and 16.7% statewide organizations), while the number of organizations referring to/contracting with outside organizations only increased, with about a third of non-Wasatch Front and statewide, as well as 21.1% of Wasatch Front, organizations, offering Benefits Counseling.

Outside organizations to which respondent organizations referred individuals for Benefits Counseling included SSA (n=7), DWS (n=4), VR (n=4), DSPD (n=1), and UWIN (n=1).

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Table 5. Providing Benefits Counseling Services

<i>Is the service provided by your organization?</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=11)
Provides services on-site ONLY	11.1%	31.6%	16.7%
Refers to or contracts with outside organization(s) ONLY	33.3%	21.1%	33.3%
Provides services on-site AND refers to/contracts with outside organization(s)	22.2%	0.0%	16.7%
Does not provide on-site services OR refer to/contract with outside organization(s)	33.3%	47.4%	33.3%
Totals	100.0%	100.0%	100.0%

Long-Term Benefits Management Services. In Table 6, how organizations reported they provide Long-Term Benefits Management services is displayed. About a third of organizations off the Wasatch Front and those that serve the entire state, as well as 50.0% from along the Wasatch Front, reported not providing any Long-Term Benefits Management services to Social Security Disability beneficiaries. Another third of organizations in every geographic region offered long-term services directly only; in addition, 11.1% of non-Wasatch Front, 21.1% of Wasatch Front, and 16.7% of statewide organizations reported that they referred to or contracted with other organizations only. Finally, a combination of on-site and off-site services for Long-Term Benefits Management was provided to consumers by 22.2% of non-Wasatch Front and 16.7% of statewide organizations.

Outside organizations to which respondent organizations referred individuals for Long-Term Benefits Management included DWS (n=2), SSA (n=2), VR (n=2), DSPD (n=1), UWIN (n=1), and “other disability agencies” (n=1).

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Table 6. Providing Long-Term Benefits Management Services

<i>Is the service provided by your organization?</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=11)
Provides services on-site ONLY	33.3%	31.6%	33.3%
Refers to or contracts with outside organization(s) ONLY	11.1%	21.1%	16.7%
Provides services on-site AND refers to/contracts with outside organization(s)	22.2%	0.0%	16.7%
Does not provide on-site services OR refer to/contract with outside organization(s)	33.3%	47.4%	33.3%
Totals	100.0%	100.0%	100.0%

Follow-Up Services. In Table 7, how organizations across the state are providing Follow-Up services to Social Security Disability beneficiaries is displayed. For each geographic area, Follow-Up services were delivered very differently. In rural areas of the state, i.e., outside the Wasatch Front, about two-thirds of organizations provide direct Follow-Up services, while the other third offers none. In contrast, along the Wasatch Front, the majority (57.9%) of organizations provide no Follow-Up services, with the remaining organizations either offering direct follow-up (21.1%) or referring to other entities for the service (21.1%). Finally, for statewide organizations, one-third provided no services, another third provided Follow-Up directly only, and the other third was divided evenly among organizations that contract with outside providers only and those that provide a combination of on-site and off-site services.

Outside organizations to which respondent organizations referred individuals for Follow-Up services included SSA (n=2), VR (n=2), Acumen (n=1), and DSPD (n=1).

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Table 7. Providing Follow-Up Services

<i>Is the service provided by your organization?</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=11)
Provides services on-site ONLY	66.7%	21.1%	33.3%
Refers to or contracts with outside organization(s) ONLY	0.0%	21.1%	16.7%
Provides services on-site AND refers to/contracts with outside organization(s)	0.0%	0.0%	16.7%
Does not provide on-site services OR refer to/contract with outside organization(s)	33.3%	57.9%	33.3%
Totals	100.0%	100.0%	100.0%

Plans for Achieving Self Support (PASS) Services. Table 8 shows which of the respondent organizations are providing PASS services to their beneficiaries. Along the Wasatch Front, about 50.0% of organizations do not offer any type of assistance in writing PASS plans, compared to a third outside the Wasatch Front and 16.7% of statewide organizations. Of those organizations that do offer services, providing them directly only is most common throughout the state, with 44.4% of those off the Wasatch Front, 31.6% along the Wasatch Front, and 33.3% of statewide organizations helping individuals with PASS plans. While organizations in all areas of the state provide this service by contracting with other entities only, statewide organizations are most likely to use this approach (25.0%), compared to those outside or along the Wasatch Front (11.1% and 15.8%, respectively). About 25.0% of statewide organizations also offer a combination of direct and indirect PASS planning services to beneficiaries.

Outside organizations to which respondent organizations referred individuals for having PASS plans written included SSA (n=3), VR (n=2), Helen Johnson (n=2), and Acumen (n=1).

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Table 8. Providing Plans for Achieving Self Support Services

<i>Is the service provided by your organization?</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=11)
Provides services on-site ONLY	44.4%	31.6%	33.3%
Refers to or contracts with outside organization(s) ONLY	11.1%	15.8%	25.0%
Provides services on-site AND refers to/contracts with outside organization(s)	11.1%	5.3%	25.0%
Does not provide on-site services OR refer to/contract with outside organization(s)	33.3%	47.4%	16.7%
Totals	100.0%	100.0%	100.0%

Impairment Related Work Expenses (IRWE) Services. In Table 9, how respondent organizations are providing IRWE services to their consumers is shown. One-third of non-Wasatch Front, 36.8% of the Wasatch Front, and a quarter of statewide organizations do not offer any type of assistance in writing IRWEs. Of those organizations that do offer services, providing them directly only is most common throughout the state, with 42.1% of those on the Wasatch Front, 33.3% of those outside the Wasatch Front, and 41.7% of statewide organizations helping individuals with IRWEs. Organizations in all areas of the state reported providing this service by contracting with other entities only, although to a lesser degree. Offering a combination of direct and indirect IRWE services to beneficiaries was most common outside the Wasatch Front, with 22.2% of organizations compared to 5.2% of Wasatch Front and 16.7% of statewide organizations using this method.

Outside organizations to which respondent organizations referred individuals for having IRWEs written included SSA (n=4) and VR (n=4).

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Table 9. Providing Impairment Related Work Expenses Services

<i>Is the service provided by your organization?</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=11)
Provides services on-site ONLY	33.3%	42.1%	41.7%
Refers to or contracts with outside organization(s) ONLY	11.1%	15.8%	16.7%
Provides services on-site AND refers to/contracts with outside organization(s)	22.2%	5.3%	16.7%
Does not provide on-site services OR refer to/contract with outside organization(s)	33.3%	36.8%	25.0%
Totals	100.0%	100.0%	100.0%

On Survey Question 2, 17 respondents who noted that their organizations did not provide one or more of the types of benefits planning and assistance services listed under Question 1 to Social Security Disability beneficiaries were asked to explain why they did not do so. Some respondents provided multiple reasons why their organizations did not offer BPA&O services, including:

- the organization had staff who were either untrained or had insufficient training (n=6);
- providing benefits planning and assistance services was outside the organization’s mission (n=4);
- the organization perceived benefits planning and assistance services as too labor intensive or too complex a system of programs, rules, and regulations (n=4);
- the organization tried to refer individuals out for appropriate services (n=3);
- the organization had too little funding to provide benefits planning and assistance services (n=2);
- the organization served too few consumers who would have benefited from the services (n=1); and
- the organization was not allowed to provide direct benefits planning and assistance under their grant (n=1).

On Survey Question 3, respondents were asked to report the number of beneficiaries who had received some type of BPA&O service, either on-site or by being referred to outside

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organizations, in the last six months. These results are shown in Tables 10 and 11, respectively.

Number of Beneficiaries who Received Some Type of BPA&O Service On-Site in the Last Six Months. Eight respondents (two from outside the Wasatch Front, three from the Wasatch Front, and three from statewide organizations) did not provide any estimate of the number of consumers for whom they had provided on-site BPA&O services in the last six months. As can be seen in Table 10, 44.4% of organizations that serve the entire state, 43.8% from along the Wasatch Front, and 28.6% from outside the Wasatch Front—reported that they had provided no consumers with any type of BPA&O services in the last six months. Most commonly, organizations said they had served between one and 13 beneficiaries, with a smaller percentage of them having served between 20 and 35 individuals in the same time period. Three organizations reported providing more than 35 consumers with some type of BPA&O service in the last half year: two in rural Utah (28.6%) served 80 and 500 beneficiaries, and another provides statewide services to 175 individuals (11.1%).

Table 10. Number of Beneficiaries who Received Some Type of BPA&O Service On-Site in the Last Six Months

<i>Number of Beneficiaries Served</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=7)	Wasatch Front (n=16)	Statewide Services (n=9)
None	28.6%	43.8%	44.4%
1-13	42.9%	31.5%	22.2%
20-35	0.0%	25.1%	22.2%
More than 35	28.6%	0.0%	11.1%
Totals	100.0%	100.0%	100.0%

Number of Beneficiaries who were Referred to an Outside Organization for Some Type of BPA&O Service in the Last Six Months. Fourteen respondents (three from outside the Wasatch Front, seven from the Wasatch Front, and four from statewide organizations) did not provide any estimate of the number of consumers they had referred to outside organizations for any type of BPA&O service in the last six months. As can be seen in Table 11, 58.3% of Wasatch Front, 37.5% of statewide, and 33.3% of non-Wasatch Front organization did not refer any beneficiaries for any type of BPA&O service in the last half year. Typically, about a third of organizations in all areas of the state referred between one and 15 individuals for services, while between 19 and 20 people were referred by 8.3% of Wasatch Front, 16.7% of non-Wasatch Front, and 12.5% of statewide organizations in the specified time frame. One organization (16.7%) in rural Utah referred over 50 individuals, while one statewide organization referred 30 individuals in the last six months.

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Table 11. Number of Beneficiaries who were Referred to Other Organization(s) for Some Type of BPA&O Service in the Last Six Months

<i>Number of Beneficiaries Served</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=6)	Wasatch Front (n=12)	Statewide Services (n=8)
None	33.3%	58.3%	37.5%
1-15	33.4%	33.2%	37.5%
19-20	16.7%	8.3%	12.5%
More than 30	16.7%	0.0%	12.5%
Totals	100.0%	100.0%	100.0%

Respondents were asked in Survey Question 4 to report the number of beneficiaries for whom PASS plans had been written, either on-site or by being referred to outside organizations, in the last six months. These results are displayed in Tables 12 and 13, respectively.

Number of Beneficiaries for Whom PASS Plans were Written On-Site in the Last Six Months. Five respondents (one from outside the Wasatch Front, two from the Wasatch Front, and two from statewide organizations) did not provide any estimate of the number of consumers for whom PASS plans were written on-site in the last six months. As can be seen in Table 12, most organizations across the state reported that they had not written PASS plans on-site for any consumers in the last six months: 100.0% from along the Wasatch Front, 90.0% that serve the entire state, and 75.0% located outside the Wasatch Front. Three organizations—two located in rural Utah and one that provided statewide services—said that they had each written a PASS plan on-site for one consumer in the last half year.

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Table 12. Number of Beneficiaries for whom PASS Plans were Written On-Site in the Last Six Months

<i>Number of Beneficiaries Served</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=8)	Wasatch Front (n=17)	Statewide Services (n=10)
None	75.0%	100.0%	90.0%
One	25.0%	0.0%	10.0%
Totals	100.0%	100.0%	100.0%

Number of Beneficiaries for Whom PASS Plans were Written by Outside Organizations in the Last Six Months. Fifteen respondents (two from outside the Wasatch Front, nine from the Wasatch Front, and four from statewide organizations) did not provide any estimate of the number of their consumers for whom PASS plans were written by outside organizations in the last six months. As shown in Table 13, most organizations reported that none of their consumers had had PASS plans written for them by outside organizations in the last six months: 100.0% along the Wasatch Front, 87.5% that serve the entire state, and 85.7% from outside the Wasatch Front. One organization located in rural Utah said three beneficiaries had been referred out to have PASS plans written in the last half year. Finally, one organization offering statewide services reported referring 100 individuals to outside organizations for PASS plans in the stated time frame.

Table 13. Number of Beneficiaries who were Referred to Other Organizations to have PASS Plans Written in the Last Six Months

<i>Number of Beneficiaries Served</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=7)	Wasatch Front (n=10)	Statewide Services (n=8)
None	85.7%	100.0%	87.5%
Three	14.3%	0.0%	0.0%
One hundred	0.0%	0.0%	12.5%
Totals	100.0%	100.0%	100.0%

On Survey Question 5, respondents were asked to report the number of beneficiaries for

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whom IRWEs were written, either on-site or by being referred to outside organizations, in the last six months. These results are shown in Tables 14 and 15, respectively.

Number of Beneficiaries for whom IRWEs were Written On-Site in the Last Six Months. Eight respondents (one from outside the Wasatch Front, two from the Wasatch Front, and two from statewide organizations) did not provide any estimate of the number of beneficiaries for whom IRWEs were written on-site during the last six months. As can be seen in Table 14, the majority of organizations—82.4% along the Wasatch Front, 80.0% that serve the entire state, and 85.7% from outside the Wasatch Front—reported that they had written no IRWEs for consumers on-site in the last half year. An IRWE was written for between one and eight individuals in 12.5% of non-Wasatch Front, 11.8% of Wasatch Front, and 20.0% of statewide organization in the last six months. A single organization from along the Wasatch Front reported serving 20 individuals during the stated time frame.

Table 14. Number of Beneficiaries for whom IRWEs were Written On-Site in the Last Six Months

<i>Number of Beneficiaries Served</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=8)	Wasatch Front (n=17)	Statewide Services (n=10)
None	85.7%	82.4%	80.0%
1-8	12.5%	11.8%	20.0%
Twenty	0.0%	5.9%	0.0%
Totals	100.0%	100.0%	100.0%

Number of Beneficiaries for Whom IRWEs were Written by Outside Organizations in the Last Six Months. Fourteen respondents (two from outside the Wasatch Front, seven from the Wasatch Front, and five from statewide organizations) did not provide any estimate of the number of beneficiaries for whom IRWEs were written by outside organizations in the last six months. As can be seen in Table 15, 100.0% of non-Wasatch Front and statewide organizations, as well as 91.7% of Wasatch Front organizations, reported that none of their consumers had had IRWEs written for them by outside organizations in the last six months. A single organization along the Wasatch Front reported referring 100 consumers to outside organizations for IRWEs in the last half year.

Table 15. Number of Beneficiaries who were Referred to Other Organizations to have IRWEs Written in the Last Six Months

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<i>Number of Beneficiaries Served</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=7)	Wasatch Front (n=12)	Statewide Services (n=7)
None	100.0%	91.7%	100.0%
Nine	0.0%	8.3%	0.0%
Totals	100.0%	100.0%	100.0%

Survey respondents were asked on Question 6 to estimate the number of full- and part-time benefits planners their organizations had on staff. These results are presented in Tables 16 and 17, respectively. Thirteen organizations—one (11.1%) outside the Wasatch Front, six (31.5%) along the Wasatch Front, and six (50.0%) statewide organizations—reported that they currently had neither full-time nor part-time staff to assist Social Security Disability beneficiaries with benefits planning.

Number of Full-Time Benefits Planners on Staff. Eight respondents (three from outside the Wasatch Front, four from the Wasatch Front, and one from a statewide organization) did not provide any estimate of the number of full-time benefits planners they had on staff. As shown in Table 17, the majority of organizations in all areas of the state—83.3% outside the Wasatch Front, 73.3% along

Table 16. Number of Full-Time Benefits Planners Organizations Reported Having on Staff

<i>Number of Full-Time Benefits Planners on Staff</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=6)	Wasatch Front (n=15)	Statewide Services (n=11)
None	83.3%	73.3%	90.9%
1-6	0.0%	26.7%	9.1%
Ten	16.7%	0.0%	0.0%
Totals	100.0%	100.0%	100.0%

the Wasatch Front, and 90.9% serving the entire state—reported that they had no full-time staff currently conducting benefits planning. Four organizations along the Wasatch Front (26.7%) and a single statewide organization (9.1%) said they had between one and six full-time benefits planners, while one organization in rural Utah reported 10 full-time benefits planning staff.

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Number of Part-Time Benefits Planners on Staff. Four respondents (three from the Wasatch Front and one from a statewide organization) did not provide any estimate of the number of part-time benefits planners they had on staff. As shown in Table 17, there was a wide variation in the number of part-time staff conducting benefits planning across the state. About 11.0% of organizations outside the Wasatch Front, 37.5% along the Wasatch Front, and 63.6% of statewide organizations had no part-time benefits planning staff. Off the Wasatch Front, respondent organizations most commonly employed between one and six part-time benefits planners (77.7%), with a single organization reporting nine or ten part-time staff (11.1%). Along the Wasatch Front, 43.9% of organizations reported between one and six part-time benefits planners, 12.5% with between nine and ten, and 6.3% with 20 part-time staff. For statewide organizations, all organizations with part-time benefits planners (36.4%) had between one and six individuals on staff.

Table 17. Number of Part-Time Benefits Planners Organizations Reported Having on Staff

<i>Number of Part-Time Benefits Planners on Staff</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=9)	Wasatch Front (n=16)	Statewide Services (n=11)
None	11.1%	37.5%	63.6%
1-6	77.7%	43.9%	36.4%
9-10	11.1%	12.5%	0.0%
Twenty	0.0%	6.3%	0.0%
Totals	100.0%	100.0%	100.0%

On Survey Question 7, respondents were asked to estimate the number of staff who had received formal BPA&O training, the total hours of training they had received, and which individuals or organizations had provided the training. This information is displayed in Tables 18 and 19. Overall, 27 of the 40 survey respondents (67.5%) reported that someone in their organization had received formal training(s) in providing consumers with information about how work might affect their benefits.

Number of Current Staff who Received Formal BPA&O Training. Three of the 27 respondents did not provide any estimate of the number of staff who had received formal BPA&O training. As shown in Table 18, organizations most commonly said that they had between one and five trained individuals on staff: 83.4% outside the Wasatch Front, 81.9% along the Wasatch Front, and 85.8% of those serving the entire state. Two organizations—one from along and one from off

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the Wasatch Front—each reported that between six and eight staff had received formal BPA&O training, while another Wasatch Front organization had 18 trained staff members. Finally, one organization offering statewide services reported that “all of its employees” had received formal training.

Table 18. Number of Staff who have Received Formal BPA&O Training

<i>Number of Current Staff who Received Formal BPA&O Training</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=6)	Wasatch Front (n=11)	Statewide Services (n=7)
1-5	83.4%	81.9%	85.8%
6-8	16.7%	9.1%	0.0%
18	0.0%	9.1%	0.0%
All employees	0.0%	0.0%	14.3%
Totals	100.0%	100.0%	100.0%

Total Hours of Formal Training Received by Staff. Again, three of the 27 respondents did not provide any estimate of the total hours of training their staff had received. As can be seen in Table 19, there was wide variation across the state in the total amount of formal training survey respondents said their staff had received. Outside the Wasatch Front, staff in all four of the respondent organizations were reported as having between two and 20 total hours of training. Along the Wasatch Front, the amount of formal BPA&O staff training was reported as follows: 23.1% of organizations, between two and 20 total hours; 23.1%, between 21 and 40 total hours; and 23.1%, between 61 and 80 total hours. A single Wasatch Front organization did not provide a numerical estimate but rather just a description of “many hours.” Among statewide organizations, two (28.6%) reported between two and 20 total training hours; one (14.3%) between 21 and 40 total hours; two (28.6%) between 41 and 60 total hours; and two (28.6%) more than 80 hours.

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Table 19. Total Hours of Formal Training Received by Staff

<i>Total Hours of Formal Training Received by Staff</i>	Percentage of Geographic Area		
	Non-Wasatch Front (n=4)	Wasatch Front (n=13)	Statewide Services (n=7)
2-20	100.0%	23.1%	28.6%
21-40	0.0%	23.1%	14.3%
41-60	0.0%	0.0%	28.6%
61-80	0.0%	23.1%	0.0%
More than 80	0.0%	0.0%	28.6%
“Many hours”–total unknown	0.0%	7.7%	0.0%
Total	100.0%	100.0%	100.0%

Organizations that Provided BPA&O Training to Staff. Survey respondents noted a broad range of organizations within and outside the state that had provided BPA&O training to their staff. Salt Lake Community College was the most frequently mentioned organization (n=12), along with the Social Security Administration (n=5), University of Montana’s Rural Institute (n=4), and the Center for Technical Assistance and Training in Denver (n=4). Other organizations that provided BPA&O training included:

- Division of Rehabilitation Services (n=3)
- Utah Association of Persons using Supported Employment (n=2)
- Utah Work Incentive Initiative (n=2)
- Alliance House (n=1)
- Denver PASS Cadre (n=1)
- Service Enhancement Associates (n=1)
- University of Missouri at Columbia (n=1)
- Utah State Office of Rehabilitation BPA&O Program (n=1)
- Virginia Commonwealth University (n=3)
- Division of Services for People with Disabilities (n=2)
- “In-house” training (n=2)
- Department of Workforce Services (n=1)
- Disability Law Center (n=1)
- Independent Living Center (n=1)
- University of North Carolina (n=1)
- Utah Association of Community Services (n=1)

Survey Question 8 pertained to whether organizations planned to obtain additional training on benefits planning and, if so, what kind of training they would be interested in. About 90% on non-Wasatch Front, 84.3% of Wasatch Front, and 90.0% of statewide organizations reported that they planned to seek further benefits planning training for their staff. Table 20 shows the types of

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benefits planning training the organizations sought. Overall, organizations were most interested in obtaining training for less intensive BPA&O services, i.e., for I&R (67.5%), PS&A (67.5%), and Benefits Counseling (67.5%), and for writing PASS plans (60.0%) and IRWEs (60.0%). Of least interest overall was obtaining training on Long-Term Benefits Management (55.0%) and Follow-Up Services (55.0%).

For non-Wasatch Front organizations, obtaining training on how to write IRWEs (66.7%) and providing Benefits Counseling (66.7%) were of most interest. Along the Wasatch Front, organizations were most interested in getting training for PS&A (78.9%) and I&R (73.7%), while for statewide organizations, Long-Term Benefits Management (75.0%) and Benefits Counseling (75.0%) were of most interest.

Table 20. Level of Benefits Planning Training that Organizations Plan to Obtain for Staff

<i>Level of Benefits Planning Training</i>	Percentage of Geographic Area			
	Non-Wasatch Front (n=9)	Wasatch Front (n=19)	Statewide Services (n=11)	Overall (n=40)
Information and referral	55.6%	73.7%	66.7%	67.5%
Problem solving and advocacy	55.6%	78.9%	58.3%	67.5%
Benefits counseling	66.7%	63.2%	75.0%	67.5%
Long-term benefits management	44.4%	47.4%	75.0%	55.0%
Follow-up Services	55.6%	52.6%	58.3%	55.0%
Writing PASS plans	55.6%	63.2%	58.3%	60.0%
Writing IRWEs	66.7%	63.2%	50.0%	60.0%

Summary

Although the 41.4% response rate was not as high as had been hoped for, sufficient information was gleaned from the survey to describe the general state of BPA&O activities currently in Utah. The survey showed that, across the state, the various BPA&O services are being provided to Social Security Disability beneficiaries by the 40 respondent organizations in a manner that had been anticipated. “Front-end,” i.e., less intensive, services such as I&R and Problem Solving and Advocacy, are being offered by the majority (85% or more) of organizations that completed the survey, with more intensive services such as Benefits Counseling, Long-Term Benefits Management, Follow-Up Services, writing PASS plans and IRWEs available on a more limited

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basis. Twenty-five percent (25.0%) of the respondent organizations offer the full range of BPA&O services, from I&R to PASS plans and IRWEs, either directly or by referring to/contracting with outside organizations; only 10.0% of them provide no benefits planning services whatsoever to Social Security Disability beneficiaries. In terms of geographic variability, organizations categorized as statewide, not surprisingly, typically offered the full array of BPA&O services, while those identified as non- Wasatch Front organizations, were more likely to offer the least comprehensive selection of benefits planning services.

Changing Paradigms about Benefits Planning for Social Security Disability Beneficiaries

Several survey results were puzzling to the evaluators and UWIN staff. First, while the majority of respondent organizations reported that fewer than 35 Social Security Disability beneficiaries had received some type of BPA&O service on-site during the previous six months, three of them said they had served a significantly higher number of beneficiaries. The statewide USOR BPA&O program served 175 beneficiaries, and two organizations located in rural Utah reported that 80 and 500 individuals had received some kind of BPA&O service in the past six months. Another unanticipated finding was that while six of the organizations said they had no full- or part-time designated Benefits Planners on staff, they also reported that they were providing benefits planning—albeit “front-end” BPA&O services (both I&R and PS&A)—to Social Security Disability beneficiaries.

In trying to reconcile these seeming discrepancies in the survey findings, it became apparent that several unacknowledged assumptions had been made in developing the survey instrument. First, it was assumed that all organizations would be thinking about benefits planning and therefore responding to the survey from the perspective of the “new” BPA&O paradigm or model, i.e., that benefits planning involves helping individuals understand and manage their SSA and other benefits in order to try, increase, or return to work. Under the “old,” pre-work incentives model, benefits planning for people with disabilities primarily involved assisting them figure out what they needed to earn in order to stay below the Substantial Gainful Activity (SGA) level and avoid overpayments. The emphasis was on strategizing how to keep one’s hard-earned disability status and, hence, benefits. As illustrated by the USOR BPA&O Benefits Specialists, providing in-depth benefits planning under the new paradigm to a large number of beneficiaries is a much more time-consuming process than was required under the old benefits planning model. This difference may explain the variability in the number of beneficiaries organizations reported they had served in the previous six months.

The second assumption was that a “Benefits Planner” would be understood by survey respondents to be any agency staff person who advised individuals on any level of benefits planning services for any amount of time per week. Indeed, this assumption seemed so “obvious” that no operational definition of the term “Benefits Planner” was included on the BPA&O survey. The fact that several organizations reported providing benefits planning despite having no Benefits Planners on staff probably reflects the reality of how services were offered under the old paradigm, i.e., by

Utah Work Incentive Initiative Benefits Planning and Assistance Survey Results

individuals who were neither officially designated nor formally trained as Benefits Planners. This difference contrasts sharply with the current model, where individuals undergo intensive benefits planning and work incentives training provided by the SSA before they begin as full-time Benefits Planners. However, the finding suggests that there may be a role for “non-specialists” to provide the less intensive BPA&O services, i.e., I&R and PS&A, to Social Security Disability beneficiaries, while using Benefits Planners with formal training to provide more intensive services.

Using the Study Results

Despite the lower-than-expected response rate and benefits planning paradigm mismatches discussed above, key information emerged from this study to assist BPA&O retreat participants and Utah Work Incentive Initiative staff as the next step in discussing of the viability and appropriateness of a statewide benefits planning system. In addition, survey findings can be used to inform planning for the BPA&O training grant received by USOR through Utah State University’s Interagency Outreach and Training Initiative (IOTI), in terms of (1) developing selection criteria for which organizations and which of their staff should attend which trainings, and (2) identifying the training content specific to the level of BPA&O services that organizations intend to provide and the number of staff they have available.

Appendix A.

**Cover Letter and “Providing Benefits Planning and
Assistance to Social Security Disability
Beneficiaries Seeking Employment” Survey**

Utah Work Incentive Initiative Benefits Planning and Assistance Survey Results

Cover Letter

August 2, 2002

Utah Work Incentives Coalition Survey: Providing Benefits Planning and Assistance Services to Social Security Disability Beneficiaries Who are Seeking Employment

The following brief survey is being conducted by the Utah Work Incentives Coalition (UWIC), an organization of consumers and agencies implementing a series of work incentives to improve employment outcomes for Utahns with disabilities. One of these work incentives is ***benefits planning and assistance*** for consumers who receive Social Security disability benefits (SSI and/or SSDI). This assistance is designed to help consumers understand how returning to work will affect their Social Security and other benefits.

We would like to know whether your organization is currently providing benefits planning and assistance services to Social Security disability beneficiaries, the nature of those services, and your training needs in this area. The information provided will help UWIC understand the extent to which benefit services are being provided in Utah and, further, how these services might be standardized across the state. UWIC will also use the survey results to select a limited number of participants for intensive benefits planning and assistance training later this year. We would like the person in your organization most knowledgeable about benefits planning and assistance to complete the survey. If you feel this person is someone other than yourself, we would greatly appreciate your passing the survey on to him or her.

We purposely decided not to make this survey anonymous, because we are interested in staying in touch with you and your organization regarding your needs in this important area. We anticipate that it will take you about 10-15 minutes to complete the survey. ***We would appreciate receiving your completed survey by August 26, 2002.*** When you have completed the survey, please mail it back by folding the survey so that the Business reply is showing and taping the survey shut. You will not need to use a stamp.

If you have any questions about the survey in general or about how to complete it, you may contact either one of us by phone or e-mail. Thank you for taking the time to complete the survey. The information you provide will allow us to better serve individuals with disabilities in Utah who are seeking employment.

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Appendix B.

List of Organizations Surveyed

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List of Organizations Surveyed

Achieve Supported Employment	Action To Success
Active Re-Entry	Affinity Services, Inc.
Alliance House	Alpine Haven LLC
Alpine Transition and Employment Center	AurorA Mental Health Project
Avatar, Inc.	Bear River Activity and Skill Center
Behavior Health Services, Inc.	Bethphage, Inc.
BJB, Inc.	Brain Injury Association of Utah
Brigham City House	C O S H
Cache Employment and Training Center	Castle Valley Center
Central Utah Center for Independent Living	Central Utah Enterprises
Children with Special Health Care Needs	Choice Supported Employment
Chryalis	Columbus Community Center
Community Careers and Support Service	Community Treatment Alternatives
Community Hope	Cornerstone Quality Resources
Cottonwood Hospital Neuro Rehab Services	Covenant Job Supportive Services LLC
Danville Services of Utah LLC	Davis Behavioral Health, Inc.
Daybreak Training Services	DDI Vantage
Development Services of Utah	Development Training Systems, Inc.
Disability Law Center	Discovering Mind Foundation
Dixie Advantages	Easter Seals Utah
Employment Link	Enable Industries, Inc.
Enhancing Lifestyles	Esteem Services
Four Corners Behavioral Health	Frontline Services, Inc.
Futures Through Choices	Genesis Services
Homeless Veterans Fellowship	Horizon Residential Services
Independence House	Iron Parke Corporation
Jordan Valley Supported Employment	Key Residential Services
Lake Point Resources	Life Skills Vocational Center
New Heights Clubhouse	New Reflection House
North Eastern Services	Oasis House
Options for Independence	Phoenix Services Corporation
Pioneer Adult Rehab Center	Quality Support Solutions, Inc.
Red Rock Center for Independence	REM Utah, Inc.
Rise, Inc.	Roosevelt Rendezvous House
Salt Lake Regional Medical Center	Sanpete Community Training
Self Determination, Inc.	Sevier Valley Advocates
Shriners Hospitals for Children	South Davis Community Hospital
South Valley Training Company	Sugarhouse Health Center

List of Organizations Surveyed Continued

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Summit Employment Agency
Transitional Training Center
Tri-County Independent Living Center
Uintah School District–CEPP
United Cerebral Palsy
Utah Independent Living Center
Utah Valley Regional Medical Center
Valley Mental Health
Valley Services, Inc.
Wasatch House
Work, Inc.

TKJ, Inc.
TRI Services
TURN Community Services
Uintah Basin Medical Center
Utah Advocacy LLC
Utah Parent Center
Utah State Office of Rehabilitation
Valley Personnel Services
Vernal Friends House
Work Activity Center

Appendix C.

List of Respondent Organizations

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Respondent Organizations Categorized as “Statewide”

Covenant Job Supportive Services LLC	AurorA Mental Health Project
Children with Special Health Care Needs	Disability Law Center
Shriners Hospitals for Children	Utah Parent Center
Danville Services of Utah LLC	United Cerebral Palsy
TURN Community Services	Brain Injury Association of Utah
Rise, Inc.	USOR BPA&O Program

Respondent Organizations Categorized as “Non-Wasatch Front”

Active Re-Entry	Bear River Activity and Skill Center
Cache Employment and Training Center	Castle Valley Center
Enhancing Lifestyles	Four Corners Behavioral Health
Options for Independence	Red Rock Center for Independence
Southwest Mental Health Center	

Respondent Organizations Categorized as “Wasatch Front”

Community Treatment Alternatives	Utah Advocacy LLC
Utah Independent Living Center	Columbus Community Center
Valley Mental Health	DDI Vantage
Tri-County Independent Living Center	Self Determination Inc.
Cornerstone Quality Resources	Pioneer Adult Rehab Center
Enable Industries Inc.	Affinity Services Inc.
Cottonwood Hospital Neuro Rehab Services	Sugarhouse Health Center
Work Activity Center	Work Inc.
Utah Valley Regional Medical Center	Jordan Valley Supported Employment
Unidentified Organization in Provo	

Appendix D.

Responses to Open-Ended Survey Questions

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ID Q1. Outside organizations to which we refer/contract

-
- 4 Problem solving/advocacy: We mostly make referrals.
- 13 I&R: Voc Rehab, Social Security, Dept of Health, other disability agencies.
PASS: When requested by consumer.
- 15 PASS: Plan to implement this.
IRWE: Plan to implement this.
- 16 I&R: Provide services for children only.
Problem solving/advocacy: We do not have much experience with work incentives.
- 20 I&R: Refer to VA or SSA.
Problem solving/advocacy: Refer to VA or SSA. Also complete eligibility forms sent by SSA.
Follow-up Services: As an agency we have one individual we are protective payee for, thus we track some things regarding money.
PASS: Wrote one plan, it was not approved due to family not reporting income.
IRWE: I tell them about it, however, didn't know it had to be a written plan. Usually refer them to VR for more information.
- 21 I&R: USOR BPA&O specialists.
PASS: Helen Johnson in the past.
- 22 Benefits Counseling: Usually SSI or VR counselor.
Long-Term Benefits: Usually VR or Accumen
Follow-up Services: Refer to Accumen, VR.
PASS: Refer to Accumen, VR
IRWE: Refer to VR
- 23 I&R: To UWIN!
PASS: Use Helen Johnson
- 24 I&R: Social Security, DSPD support coordinators, or intake person.
Problem Solving and Advocacy: Our federal contracts rehab care worker
Long-Term Benefits: Refer to DSPD support coordinator
Follow-Up Services: Refer to DSPD
PASS: Very rarely we have helped
IRWE: Very rarely
- 25 I&R: Refer to DSPD, DRS, Social Security workers, DWS.
Problem Solving and Advocacy: Refer to above agencies
- 27 I&R: SSI itself
Problem Solving and Advocacy: In progress of developing program to help individuals gain work
- 28 Benefits Counseling: HR and Voc Rehab
Long-Term Benefits: Their HR department
Follow-Up Services: Back to Social Security
PASS: we refer them to their SSDI counselor
IRWE: we refer them to their SSDI counselor

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- 29 Problem Solving and Advocacy: No assistance for eligibility
Long-Term Benefits: limited
PASS: Have historically
- 30 I&R: SSA, Workforce Services
Problem Solving and Advocacy: Medicaid, food stamps, SSA
Benefits Counseling: SSA, Workforce Services
Long-Term Benefits: SSA
Follow-Up Services: SSA
- 31 Benefits Counseling: SSA, DWS
- 32 I&R: SSA
Problem Solving and Advocacy: SSA
Benefits Counseling: SSA
PASS: SSA
IRWE: SSA
- 34 I&R: Voc Rehab, DWS
Problem Solving and Advocacy: Voc Rehab, DWS
- 35 Benefits Counseling: DSPD support coordinator
- 37 Benefits Counseling: SSA, DWS
IRWE: SSA, Voc Rehab
- 38 I&R: SSA, Voc Rehab, DWS
Problem Solving and Advocacy: SSA, Voc Rehab, DWS
Benefits Counseling: DWS, SSA, Voc Rehab
Long-Term Benefits Management: DWS
PASS: SSA
IRWE: SSA
- 40 Benefits Counseling: Refer to SSA counselor
- 41 All levels: Refer to Voc Rehab
- 42 I&R: UWIN, Social Security
Problem Solving and Advocacy: UWIN, Social Security
Benefits Counseling: USOR Benefits Counselors
Long-term Benefits Management: UWIN, Social Security

Utah Work Incentive Initiative Benefits Planning and Assistance Survey Results

ID Q2. If your organization does not provide one or more of the benefits planning and assistance services listed under Q1 to Social Security beneficiaries, please explain why not.

-
- 5 Only two people in services. One could benefit, one would not. Too labor intensive, not enough funding. Regulations are too restrictive.
- 8 Difficulty/complexity. Provide in other areas not Utah.
- 11 Lack of training information.
- 13 We are a new center we provide the services when they are part of the IL plan.
- 18 I have never been trained.
- 20 Sometimes DSPD (Division of Services for People with Disabilities) does the counseling and referral or the vocational rehabilitation.
- 21 Under our SSA grant we are not allowed to provide direct benefits planning.
- 22 We try to refer our young adults to the appropriate services in the community.
- 23 We make some referrals, these “dried services” outside our mission to directly address the needs of parents...however, part of their needs for info on various services for the family member.
- 25 Do not have anyone with sufficient training in these areas.
- 26 Affinity is a workshop for people with disabilities. All of our individuals reside in supervised apartments and are provided those services by other agencies. These agencies oversee and regulate their Social Security benefits.
- 27 Lack of training.
- 29 We are planning to expand in these areas—we got away from it during administrative changes. We are currently assisting new staff in learning but find learning/tracking resources limited.
- 31 We do not provide benefits counseling because we do not have enough training to provide an in-depth analysis. We refer them or support them in contacting the SSA or DWS representative.
- 32 We are not a part of or associated with the SSA.
- 33 We are a Transitional care unit. Most of our patients are 65 or older and have orthopedic problems (i.e., hips, knees). Our patients that are younger as a majority still work. If this service is provided, a hospital social worker would provide it, not recreation therapy.
- 37 “N/A”
- 38 “N/A”
- 41 We do not provide the service onsite due to lack of knowledge and training in this specific area of supported employment.
- 42 We provide limited services but the programs and rules are so complex we need constant training on them.

Utah Work Incentive Initiative Benefits Planning and Assistance Survey Results

ID Q7c. Who provided the training(s)?

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- 1 (1) Center for Human Services Training. (2) Benefits Specialists from USOR. (3) UACS, UAPSE, David Hammis, Rural Institute.
- 2 (1) SLCC
- 3 (1) DSPD and Service Broker Training. (2) SLCC
- 4 (1) Two staff members who work at the Deaf Center have some trains from Social Security but no formal training.
- 8 (1) Self-provided. Internally developed.
- 9 (1) In house for most of the training
- 11 (1) CTAT. (2) Salt Lake Community College Employment
- 13 (1) Sandra Meehan
- 17 (1) Center for Human Service Training. (2) Social Security Administration representative
- 19 (1) SLCC-sets net also. (2) CTAT
- 20 (1) VA Commonwealth University (SET net). (2) Noreen Brown, Ester Medina, and Judith Holt. (3) David Hammis, University of Montana-Rural Institute.
- 21 (1) Matt Knotts (2) Nancy Friel (3) Janis Tetro
- 24 (1) U of U (2) CTAT (3) UNC (4) Social Security office (5) DRS
- 25 (1) Service Enhancement Associates (08/19/02) (2) SET NET 2002 - Supported Employment Telecourse Network.
- 26 (1) Salt Lake Community College–Division of Services for People with Disabilities.
- 27 (1) SLCC–Becky Taylor.
- 29 (1) UAPSE. (2) CHSI–SLCC. (3) Voc Rehab.
- 30 (1) Denver PASS Cadre. (2) Rural Institute (David Hammis). (3) University of Missouri Columbia.
- 31 (1) Rural Institute on Disabilities–U of Montana. (2) CTAT. (3) Salt Lake Community College.
- 32 (1) Different agencies.
- 34 (1) Salt Lake Community College. (2) Alliance House–VMH. (3) DWS.
- 35 (1) SSA.
- 38 (1) SSA.
- 39 (1) Salt Lake Community College.
- 40 (1) SSA. (2) Rehab.
- 42 (1) Judith Holt.