

**Next Meeting of the  
UTAH WORK INCENTIVE COALITION  
(UWIC)**

**December 18, 2001  
10:00 am to 11:45 pm  
at the  
State Tax Commission  
210 North 1950 West**

**Main Floor, Rooms 1026 and 1027**

**Directions: Travel westbound on North Temple past  
Redwood Road and Days Inn to 1950 West. At the light just  
before the freeway overpass turn North and continue to 210  
North upon entering the tax commission building go right**



**AGENDA  
UWIC  
December 18, 2001**

**Welcome and Introductions  
Presentation on Benefits Planning  
Discuss Goals of Workgroup  
Review and set Action Steps  
Schedule next meeting and location**

**Website: [www.uwin.org](http://www.uwin.org)**

**Work Incentives Workgroup Past Meeting Minutes**

October 9, 2001

10:15 – 12:00

Attendees: Sandra – Utah Center Independent Living, Mark – Aids Advocate, Susan Loving – Office of Education, Bill Young -- Ticket to Work, George Julnes -- USU, Susan Rule – USU, Rick Cobia – DSPD, Hank Liese – UofU, Kathy Daley & Jolene -- Benefits Planning, Matt Knotts –DLC, Corey Rowley – ILC, Paul Day – DSPD.

Brief description of the work group: Ticket to Work (Bill), Medicaid Buy-In, Benefits Planning (Kathy), Protection and Advocacy Program (Matt). Every one's view counts, we want and need diverse points of view. This is an action group. We are going to do things that help people with disabilities have incentives to return to work. Our group will work together to set the actions to be taken.

Participant Action Research (PAR) is the approach that we will use to develop action steps. The PAR approach is characterized by bringing people together with diverse perspectives to solve problems (participation), identifying actions that can solve problems by building group consensus through listening to and sharing personal perspectives and experiences, and evaluating actions taken to see if they are effective and revising actions as needed based upon research findings (research). PAR involves four basic steps, taking stock, setting goals, developing strategies and documenting progress.

**Taking Stock:** The group took stock of who was missing from the group and made assignments about who could bring the missing points of view to the next meeting.

Name/Role	Member who will invite
Greg Hardin representing mental health consumers	Matt
Phil representing Social Security Agency	Corey
John Paulding representing Mental Health Agency	
Tina Johnson representing legislative coalition	
Don Martin	
Pete Shingledecker representing Provider Agency	Rick
John Harbert representing Provider Group	Paul
Parents who have Kids transitioning	
Parents who work with DSPD Family Council	Paul
Person who Wants to get off SSI	
Person who Wants to work and stay on SSI	
Person who Wants to get SSI and not work	
Self-Advocate who receives DSPD funding	Rick
Linda Asa representing Dept of Health Agency	Kathy
Kevin Duffy Rehab	Kathy
Marilyn Call Rehab	Kathy
Disability Determination Services	Bill
People who receive services in rural Utah	
John Gilbert Valley Services	
Students at college With disabilities	Susan Rule
People who are Blind	
People who are Deaf	
People who participate in Independent living	Corey
Consumer	Mark
Employers	

The group discussed involving employers in the group. The group seemed to want to involve employers after the group worked out issues that may not concern employers. Potential employer members included representatives from small business development councils, Discover Card, Deseret Industries, Marriott, employer networks and Small Business Administration. Barriers that employers face in hiring people who are receiving Social Security  
 What have other states done?

**Setting Goals:** Group members volunteered to invite people who were missing to the next meeting. Corey took the assignment to ask Linda Asa to provide training on the Medicaid Buy-In and Jolene agreed to provide information on Benefits Planning at the next meeting.

Setting Goals

What are the goals of our work group?

What do we want to see happen?

**Developing Strategies:**

Group needs to learn more about work incentives and benefit planning.

Set up strategies that can facilitate coordination of work incentives among agencies, set up statewide models for quality assurance of information and ways to ensure there is consistency in message sent out to individuals receiving SSI and work incentives. Other agencies like mental health and services for people with disabilities provide benefits planning. Need to set a standard so same information is going out. Need to establish standards for training benefits specialists. Discuss ways to monitor the quality of information and prioritize who gets services.

**Documenting Progress:**

Want to know who if people who participate in Medicaid Buy-In are satisfied? If people are finding Medicaid Buy-In and Benefits Planning easy to access? How eligibility is determined? If there have been appeals? Which groups have received training or information about the program?

November 13, 2001

Attendees: Sandra – Utah Center Independent Living, Mark – Aids Advocate, Susan Loving – Office of Education, Bill Young -- Ticket to Work, Rick Cobia – DSPD, Lynn MacLeod – UofU, Kathy Daley & Jolene -- Benefits Planning, Matt Knotts –DLC, Corey Rowley – ILC, Paul Day – DSPD, Suzzett M – DWS, Drew Hyde – MH, Linda Asa – Health, Dan Crandall – Rehab, Pheobe Blackham & Deborah Bowman – Family Council, Kara Bodry -- .

Next Meeting December 18, 2001 (location TBA)

**Taking Stock:** The group took stock of how the Medicaid Buy-In program works and how it is developing. The group discussed eligibility policy and issues for participants. Learned that participants in the Medicaid Buy-In program pay a premium instead of a spend down and that the program allows users to keep more money. Discovered that the number of participants has grown from July 2001 to October 2001. In July 49 people were participating, in August 104, in September 108 and in October the number participating in the buy in reached 118.

Those who were already on Medicaid are automatically switched over to the buy-in. There is capacity for 200 participants. Letters have been sent to Medicaid eligibility workers asking them to let potential participants know about the buy-in. No age restrictions, person must be working and must earn at least \$1 a month of income and have a check stub or tax record to verify earnings.

**Setting Goals:**

Targeting letters are needed notifying people on spenddown of Medicaid Buy-In, benefits planning and other incentive programs. Agencies should send out letter per recommendations and coordination of the Grant Oversight Committee. Example: Letter should be sent out to people participating in the physical disabilities waiver through DSPD who may qualify under new requirements and clients of mental health, rehabilitation, among people who are deaf or blind.

**Developing Strategies:**

Group still needs to learn about benefit planning. Standards for benefits planning need to be discussed and established.

What can be done about consumer concerns over disclosing reportable income and ways of working around system to increase earnings they are able to keep. Self-employment opportunities?

Targeted letters should be sent to various groups who could benefit from Medicaid Buy-In and Benefits Planning. Management group should make suggestions about the groups who should receive and should develop the content and establish a consistent and unified message for these letters. Items that agencies send out related to work incentives should be reviewed by the Grant Oversight & Evaluation Workgroup so the message remains consistent. These letters should be kept at or below an 8<sup>th</sup> grade reading competency and should be reviewed by representatives of the groups they are to be sent to for suggestions and clarification. Letters should provide definitions of terms

**Documenting Progress:**

Group received answers to questions about Medicaid Buy-In. Getting data on how satisfied people are with the Medicaid Buy-In program and user issues or ideas for improvement would be helpful to the group.

Information on what is happening with outreach and training and which groups have received training on work incentives would be helpful to the group.