



# Transition Clinic Training Workshop


Becki Koehler

Easter Seals Nebraska



# Benefits Planning and Assistance

- emerging field
- gaining momentum since passage of the Ticket to Work and Work Incentives Improvement Act of 1999



The purpose of benefits planning and assistance is to help Social Security's beneficiaries with disabilities --

1. Understand the impact of earned income on their disability related benefits.
2. Develop a plan to safely navigate into or maintain competitive employment while protecting essential benefits (medical, cash, services).
3. Use state and federal employment supports or work incentives.



## Planning Services --

- Obtain and evaluate comprehensive information
- Assess potential impacts of employment on benefits eligibility and overall financial well-being
- Provide detailed information and guidance to help the beneficiary understand
- Develop possible options and projected results to support career planning



## Assistance Services --

- Encourage and promote employment, greater self-sufficiency, and the benefits of work incentives
- Refine and implement a plan of action
- Help with problem solving
- Provide monitoring and management assistance including support at critical transition points (age 18 re-determination, continuing disability reviews, starting work, etc)
- Maximize the use of employment supports and work incentives as the beneficiary prepares for, obtains, regains, or advances in work

# Case examples --

## ■ Transitioning youth with cystic fibrosis

- using Plan to Achieve Self Support to fund part of her rehabilitation plan
- could have secured an additional \$4,176 if benefits planning and assistance services had been started earlier

## ■ Adult with spinal cord injury

- turned down raises and promotions, worked more hours than paid, because of fear of losing Medicaid
- using Plan to Achieve Self Support and eventually 1619(b) or Medicaid Insurance for Workers with Disabilities (MIWD)