

Wisconsin Benefit Offset Pilot Phase-Out Plan

Wisconsin will begin preparing for phase-out activities during summer 2008. Implementation of the activities will occur fall 2008 through spring 2009 over a six month period. The activities will be developed and monitored through the Department of Health and Family Services Pathways Office; however we will be utilizing our twenty community-based agencies in conducting many of the activities. We anticipate making information available at many “contact points” within the existing system including those that are currently interacting with participants as well as logical points within the system where Pilot Treatment group participants are likely to have contact in the future.

I. EDUCATION/INFORMATION DISSEMINATION

A series of informational materials will be developed and disseminated with the intention of educating and informing individuals about the end of the pilot.

Participants: A letter will be sent to each participant, both Treatment and Control group members, during **October 2008**. Control group members will be thanked for their participation and informed that their pilot participation will officially end spring 2009. Treatment group members will be provided with the date they officially enrolled in the pilot and, to the best of our ability, the projected date at which the Cash Benefit Offset will no longer be available (if they have already used their Trial Work Period months/the end of their 72 month Extended Period of Eligibility). Participants will be strongly encouraged to meet with their Benefit Specialist prior to the pilot ending. Wisconsin plans to make benefits counseling services available to all participants throughout 2009 in order to assist participants if issues arise.

Pilot Sites: The Benefits Specialists who have been working on the pilot will be provided with clear information and instructions on how to assist participants during the final months of the pilot. The expectation that they make every effort to meet with Treatment group participants prior to March 2009 will be clearly communicated. All twenty pilot sites are also contracted to provide Work Incentive Benefits Counseling services under the Wisconsin Medicaid Infrastructure Grant (MIG); it is anticipated that these services will continue to be available to participants on an ongoing basis. Three of the twenty sites can also provide benefits counseling services under their WIPA contract.

Additionally, sites will be required to complete and submit any outstanding monthly research forms and to complete the 2009 Work History exercise. The current compensation system will continue to be used throughout the end of the pilot.

System Partners: Informational briefing documents will be developed and disseminated to a variety of partners throughout the system to provide them with a) basic background information on the pilot and b) education on what to do/where to direct Treatment group participants as issues arise. This information will be presented and available to the following partners in Wisconsin:

- Division of Vocational Rehabilitation (DVR)
- Disability Program Navigators (DPN)
- Disability Benefit Specialists (Advocacy-based professionals)
- Work Incentive Benefit Specialists
- Long-Term Care System (funded through Medicaid Home and Community-Based Waivers)
- SSA Area Work Incentive Coordinator (AWIC) to be shared with the SSA Work Incentive Liaisons (WILs)

It is critical that the work be done in collaboration with the AWIC and WILs as the local SSA offices will likely be the primary point of contact for many Treatment group participants following the end of state-level involvement in the pilot.

II. LOGISTICS/PROCESSES

Ongoing Reporting Requirements

Wage reporting, annual earnings estimates, and end of year reconciliation information have been collected by the pilot Benefits Specialists and compiled and reported to SSA by the Pathways staff throughout the pilot. It is unclear at this point how SSA plans to collect this information beyond April 2009. Should SSA opt to develop and implement an automated system, Wisconsin will assist in training partners and disseminating the logistical information statewide.

Benefit Offset National Demonstration (BOND)

Should Wisconsin be one of the ten SSA areas included in the Benefit Offset National Demonstration (BOND), we strongly recommend that current pilot Treatment group participants have access to the employment support system (i.e. benefits counseling and other related employment services and supports) available to comparable Tier II BOND participants. It is anticipated that BOND will begin enrolling participants in early 2009 which corresponds well with the end of the pilot phase. It seems logical to make the same system of services, supports, and reporting systems available to specific participants in BOND as well as the current Pilot Treatment Group.

III. RECOMMENDATIONS

The following recommendations are suggested by Wisconsin with the intention of enhancing efficiency in state and local SSA-level involvement. The suggestions may be applied to pilot phase-out, but can certainly be considered for BOND as well.

- We recommend that the existing eWork system be utilized for Pilot participants. eWork can be used to better identify and track work and earnings-related information as well as offset calculations for participants. Using eWork will likely save time and effort by creating a cleaner and more efficient way for OCO and Field Office staff to access consistent participant information. Additionally, local SSA Field Office staff are experienced in procuring and entering 821 information into eWork, which may help reduce the workload on OCO staff.

- We recommend that Treatment group pilot participants be identified more clearly on the DOS/mainframe system within SSA. An OCO name and contact number should be listed in case local Field Office staff have questions. Additionally, a clear reference to the individual's eWork file should be identified here as well.
- We recommend that SSA provide the four states with their plan for phase-out activities by 9/30/08. Wisconsin will assist in implementing the broader phase-out plan at SSA's request and direction. Additionally, information on BOND implementation will be very helpful for the states that fall within one of the ten identified SSA BOND areas.
- We recommend that SSA explore alternative options for Treatment group participant payment reconciliation. One possible option involves utilizing a retroactive monthly accounting system in applying the offset rather than annual estimates and averaging.
- We recommend that SSA set-up a direct phone # for participants with designated OCO staff members handling the calls and providing ongoing technical assistance to participants in the Treatment group.
- We recommend that local SSA Area Work Incentive Coordinators (AWIC) be invited to the monthly 4 State Pilot Conference Calls during the remainder of the Pilot. The AWIC can then share information about ongoing Pilot activities with the Work Incentive Liaisons (WIL) in each state. OCO can provide direct technical assistance to the AWICs as needed.
- We recommend that SSA send a letter to Treatment group participants at the 69th month of their EPE notifying them that they have used all their TWP months and the projected 72nd month (end date) of their offset payments.