**Policy Academy**
**June 8, 2010**

**Present:** Linda Raap, Enid Glenn, Allison Gordon, Deb Henderson-Guenther, Linda Vegoe, Karla Opatz, Lea Collins-Worachek, Sue Munger, Beth Ulrich, Anna Eggebrecht, Keith Iris, Kathy Massa, Tammi Cassidy-Neal, Kathleen Hart, Sharon LaRose, Cherry Barnes

**Video Conferencing Debriefing** **All**

- Saved drive time.
- At times wanted to share information but was not able to, challenging.
- Better then anticipated, but prefer it in person. Better connection.
- Limited the discussion, waiting. Balance of time and travel, but beneficial to be in person.
- Need to zoom in on face so that everyone can see you. Went a little slower. Easier in person.
- Got cut off 3 times.
- Facilitator felt bossy. More challenging trying to coordinate the larger group in CO.
- Lighting was different in the rooms, hard to see people.
- Still trying to learn the system.
- The non-verbal's were hard.
- Suggestion to maybe cluster around the state to allow you to still have connection to other people.
- Felt larger group overpowered the individuals at remote sites. Individuals did not have as much ability to communicate.
- Enjoy the dynamics of meeting in person.
- Nice option to have for bad weather or for those that do not want to travel.
- Did not allow as much interaction.
- Not preferred mode of communication for this group. May be good in Jan or Feb instead of canceling meetings for bad weather.
- **Policy Academy proposes that we continue to meet in person. In the winter months use if weather is bad. And if other months warrant. Schedule the room in advance for at least Jan. and Feb.**
    - **Prior to meeting through VC- find resources to help with etiquette and meeting techniques and tips (e.g. zooming, round robins, lighter agenda, etc.) GoToMeeting website suggested.**

**SSA/TTW Training Recommendations** **Allison**

1. In what areas are you experiencing difficulties related to the outlined case responsibilities?
    - When to complete the 1365
    - When to collect wages for TTW and SGA
    - Collection of the pay stubs- getting them from consumers. Techniques on how to do that.
    - Forget to use.
    - Nothing to trigger this- need something in the system to remind or not allow to close case if not done.
    - Have a lot to do, very confusing.
    - Requires too much work. Do not have right documentation to begin with.
    - Need script. Articulating benefits to consumer
    - Do not do often enough- out of site out of mind.

- Need CO staff to handle this.
- Don't know if going to earn TWW or under- until get job.
- Get SS to automate it.
- So many rules and regulations- need a person doing this job.
- Need a monthly reminder.
- Not priority.
- Need a wisard report.
- Struggle how to explain to consumer and impact on them.
- Take time to read materials.
- Consumers do not follow through and change their minds.
- New twist in email after the training.
- Need it to be very simple.
- Need to know what Maximus is doing in relations to this as consumers get email.
- Get annual update and update on changes are needed.
- Felt info was clear but need updates as change.
- A lot of process and little benefit.
- Difficulty at initial IPE to determine if TWW would be achieved.
- Staff struggle with emails of in-use vs. assigned.
- Difficult to collect paystubs.
- Email after training changing-made confusing.
- Pass off after 90 days to partners.
- What if goal changes and write a new plan. What to do then.
- Will new IRIS include the form and reminder to complete the form at time of IPE development?
- Should everyone sign the form? Would that be beneficial?
- More interactive. Have laptops to get to web and find where information is.
- Life of the ticket…some may have expired- confusion with this.
- ERI presentation, consumers will want to go to them vs. staying with DVR for 9 months.
- Holes with understanding the entire program and DVR's impact, working with EN's, can they work with ENs after they go off benefits.
- Suggestion of joint training with EN such as ERI. Need holistic training.
- Forefront should get the consumer out of poverty.
- Suggestion that Sally Rhodes be part of training to staff.
- Directive after the training. When do you assign form and when not.
- More information on EN's. Who are they and what do they do?
- Incentive to DVR and Consumer.
- Interactive training.
- Hard time understanding benefit analysis reports. All look the same and confusing to client. All just want to know the amounts. Need just section on this.
- Can not answer questions that are asked on TTW program.
- Have two staff in area that understand it very well.
- Do consumers need information up front to stop assumptions? Consumers are fearful of losing benefits.
- Would it be beneficial to have a specialist or rep for each WDA?
- Handout that they can have in simple terms that consumers can take with them after meeting. Explaining the program.
- Have orientations sessions on benefits and work incentives. For only SSA recipients. Use Independent Living Centers.
- Benefits counselors not catching everything. Client needs to disclose everything.
- We are trying to explain to someone what they do not understand and this is important information for consumers.
- Can we use financial consultants vs. counselors trying to work through information with consumer? Financial classes, other resources, etc.
- Seeing same presentations.

2. Related to the Social Security Cost Reimbursement and Ticket To Work Training, what areas do you feel you need additional training on (e.g. your responsibilities, discussing program with consumer, understanding the SSA/TTW program, etc.).
    - Reviewing TTW payments and milestone payments.
    - Training and examples of cases.
    - What happens with ENs and how impact consumer.
    - Contact expert person to answer questions
    - Working with consumers on understanding.
    - Cheat sheet and reminders.
    - Experts and who are experts.
    - Understanding responsibilities.
    - Training on all areas.
    - Should not do follow-along and refer out to other agency to do follow-up.
    - Training on ways to obtain wage information- even with follow-along payments.
    - Trying to sort through process.
    - Uncomfortable with process.
    - Videoconference/ webcast- to view later. Available for a refresher.
    - How to remember, yearly webcast. Yearly training.
    - Triggers on IPE page.
    - Training on when to complete the form- responsibilities.
    - Self-employment cases- how to use, how to collect wage information.
    - FAQ.
    - Specific WDA representative to go to.
    - Holistic training.
    - Start at bottom- understand the TTW program, then DVR, then EN.
    - Follow-up training after the training occurs. Ask for questions from WDA that came up after the training.
    - More information on EN's.
    - Rules of milestone payments.
    - Consistent messages. Clear understanding by presenters.
    - More than 1 year training so stay fresh in mind.
    - Difference of SSI/SSDI and training on each one.
    - Training that can be referred to.
    - Review mechanisms (Julie W.)

3. Are there any specific topics you feel should be covered that bringing in an outside speaker/expert would be helpful for (e.g. benefits specialist, SSA rep)?
    - Orientation session on work incentives
    - CESSI-Sally Rhodes
    - Why is it such an important topic.
    - Benefits Specialist- Q & A.
    - How to explain to consumers.
    - Get SS later and not tell us.
    - Experts should not assume we have a level of understanding. Basic level.
    - Maximus could come and speak and discussing what they share with consumers.
    - Having teams share their experiences and best practices. Internal training within the team- what cases worked well and the process that worked well for them.

**Self-Employment Questions** **Anna**

- Business plans are reviewed monthly by committee. Five members on committee. Follow the toolkit. Review 1-2 plans per month and provide technical assistance.
- Committee does not always feel expert.

- Feel missing feasibility up front. Should business plan committee be part of the feasibility part.
- Not guaranteeing self-employment- consumers not always understanding dual track. Unsure if counselors are having discussion.
- Not consumer friendly format.
- Need large print- over 1000 pages.
- Want fee schedule put back in.
- Work incentives related to self-employment
- Discussion
  - WDA 3 has a free consultant that they can work with up front to discuss feasibility. Very helpful to have this upfront.
  - Sent to SW CAP and work with them to address the feasibility.
  - WDA's could be bringing in groups to discuss feasibility so individual staff do not need to do individually.
  - Fee schedule- individual items can be looked at within fee schedule.
  - Make a flow chart that is friendly. To accompany the toolkit.
  - Most WDAs are using vendors for feasibility studies but do not feel meeting needs. Example: not looking at cash flow. Suggestion to focus more on implementation vs. solid plan.
  - Develop questions of what is needed in feasibility study.
  - Anna E. and Pamela W. would like to work on addressing these topics in the toolkit.
  - Fee schedule does not answer if items are needed for the START-UP of the business. Need to answer what they need as a start-up. Work with local resources and experts to address this as needed. Determine what is needed.
  - Use yellow pages, internal discussions on consultants to refer consumers to.
  - Some consumers have ability to go through and read whole thing. Can go through sections at a time. Need to adapt to use.
  - Fee schedule change makes sense. Typically exceeds fee schedule anyways.

  **Conclusion:**
  - Fee schedule- leave removed. Delegated authority.
    - Workgroup will discuss consumer friendly, checklists, ensure feasibility covered- including benefits analysis, and work incentives related to SS.

**Unverified Advance Payments** **Allison/Linda/Enid**

- Accommodate where the person is at to ensure they understand their responsibilities.
- Positive language should be used.
- Change language to may or may not be considered.
- Include information on when you should use an advance pay process.
- Include in the draft that the VRC/DVR staff must talk with the consumer about options to resolve unverified payments and when these discussions should take place – upfront, while collecting info, & at the end.
- Recommended starting the 15 day clock at the end date of service. Even when this is done the concern was mentioned that it would mean consumers holding on to receipts for long periods of time which might cause problems because they could get lost etc.

Other areas of discussion:

- Concerns discussed that it takes much longer than 15 days to verify purchases with farm plans.

- Evaluate the need to advance the total amount? Can it be in incremental amounts e.g. once 1 item received, then authorize for next advance, etc.

**Supported Employment** **Linda V**

Issue: In some areas, DVR is closing SE case automatically when there is no long term support without having the conversation with the consumers about other options for SE services e.g. looking for natural supports, etc.

The Employment Support Planning process should be used to bring in family and others from support systems to brainstorm options.

- Discussion continued regarding practices throughout WDAs. Even if SE assessment says the person requires 100% support, DVR needs to discuss the results with the consumer, etc. to see if the consumer agrees. We should check further and not automatically be driven by the vendor's opinion given in the assessment report.
- We need to continue to work with provider to get them to look outside regular supports/options.
- All staff need to be reminded of the SE guidance and that our process has changed. Some still following previous SE procedures. http://dwd.wisconsin.gov/dvr/ppg/guidance/long_term_support.pdf (January of 2010)
- PA recommends that this topic be discussed at the next managers' meeting.

**Orientations Sessions:**

- Some WDAs have orientation sessions in all areas and some only offer orientation sessions in some of their counties.
- Discussed various presentations: Linda Vegoe's, benefit counseling service that could be share. As a resource, could Linda's presentation be provided to people on the waitlist.

**Recommended:** Addition of best practices for orientation sessions to our web page which could include letters that WDAs send out to announce the sessions, etc.

**Legal Citizenship/Haiti Relief**

Discussed & no concerns expressed by PA. Felt it would have little impact on us. Policy analysts will revise to add this to guidance.

**Mass Mailings:**

- Current directive states we must attach all letters. However, when we do mass mailing announcing events to consumers, attaching the mailing to each case record creates a workload issue and uses a lot of memory in our system.
- Could we include a case note in the file documenting that a general notice has been sent out in place of attaching the actual announcement?
- Policy analyst will revise the current scanning directive to state that we should case note these general announcements
- WDAs should send such announcements out in a flyer format, not an individual letter to the consumer, about general events e.g. AT events, etc.
- *General announcements are defined as those provided to consumers only for informational purposes, and consumers can choose to attend or not attend, and this decision will not be used to measure the consumer's IPE progress.*

**Social Security Releases**
Reviewed the three releases Bob Monahan had referenced in his questions about DVR's accepting of these releases.

- Currently, staff have consumers sign our release before sending records when the 827 is received. Discussed revisiting this to see if we now could accept the 827. Analysts will follow up with Mike.
- Staff had never seen one of the three releases and the other release is one that Social Security requires us to use to obtain information from them. So, the only release needing further clarification regarding use is the 827.

**Discussed the need to email handouts to PA members joining by phone**. When the agenda is sent out, Tamara could designate who will be joining by phone. Each person who has handouts will have the responsibility of emailing those handouts to them.

**Update on PA members:**
- Beth leaving & no decision made at this point on replacement
- Kathy leaving & will be coming next month

**Take back items**
- SSA/TTW: Workgroup developed to review current process & looking at another round of training using input from the WDA
- Directive on unverified payments – Corporate report
- Self employment: Fee schedule information & review of current materials
- SE – consistency statewide looking at other options – will be discussed also at the managers meeting
- Follow up guidance – will go to SLT
- Orientation – take back to directors
    - Policy – applications must be sent when requested – cannot require a consumer to wait and bring in applications at first meeting.
- Legal citizenship
- Mass mailings – Guidance will be updated and field notified of updates.
- DDB Release - clarifications