

DRI *News*

Special Edition
2004 Symposium

A Newsletter from the Disability Research Institute

Spring 2004 - Volume 4 Number 1



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UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

DRI Annual Symposium Highlights



DRI director Tanya Gallagher and Martin Gerry.

On March 16th, 2004, the Disability Research Institute (DRI) held its annual symposium at the National Press Club in Washington, D.C. This day-long event brought together nationally recognized researchers and leaders from federal agencies, state agencies, and disability communities to discuss the SSA disability determination process, return to work and transition to work for individuals with disabilities, and the Ticket to Work and Work Incentives Program as they relate to facilitating employment. The Symposium was interactive with panel discussions and audience participation addressing these important topics and poster sessions displaying Disability Research Institute research projects that were completed and those that were ongoing. Over 230 people attended the symposium, which was organized into four sessions.

Session One: Disability Determination Process

The first session opened with Martin Gerry, Deputy Commissioner, Office of Disability and Income Security Programs, who provided an overview of Commissioner JoAnne Barnhart's plan for disability determination process improvements announced in September 2003. He reported that it currently takes an average of 600 days to complete the disability determination process and that average can extend to 1,150 days if the case goes to the Appeals Council and up to 4-5 years if there are court hearings. He shared that the Commissioner's plan focuses on two overarching goals: 1) to make a correct eligibility determination as early as possible, and 2) to nurture return to work at all steps of the process. The improvements proposed are designed to increase the efficiency and accuracy of the disability determination process, to decrease the financial burden on people with disabilities and their families, and to provide cost savings for the SSA Disability Insurance Trust and General Revenue Funds. New aspects of the plan include a Quick Decision Process, the formation of centralized medical and vocational expertise within the Regional

On the Cover



Over 230 leaders in disability research from across the nation attended the DRI 2004 Symposium at the National Press Club in Washington, D.C. This year's interactive format included panel discussions, audience participation, and posters of DRI research with researchers available to discuss their work. Attendees provided overwhelmingly positive feedback on the new symposium format.

Expert Review Units, and the inclusion of Reviewing Officials. Mr. Gerry shared that the Commissioner has also announced a variety of national demonstration projects that will focus on returning people with disabilities to work by providing opportunities and incentives earlier in the disability determination process. These projects will also provide the Social Security Administration with information for consideration as this plan is implemented.

After Mr. Gerry's overview presentation, panelists Monroe Berkowitz, Director, Program for Disability Research, Rutgers University; Ronald Leopold, National Medical Director, Vice President MetLife; Kim Hildred, Majority Staff Director for H.R. Representative Clay Shaw, Chair Social Security Subcommittee, House Ways and Means Committee; and Carol Petersen, Assistant Director, Education, Workforce and Income Security, U.S. General Accounting Office each addressed the policy questions: *What are your reactions to the disability determination process improvements, and what suggestions would you make to the agency?*

Panelists concurred that there was a need to address length, complexity and consistency challenges in the system. Monroe Berkowitz highlighted the need for applicant screening for possible early intervention, a process his research is exploring. Ronald Leopold emphasized that most medical providers are not trained to make functional interpretations of medical conditions or injuries and that efforts need to be made to address that knowledge gap. Kim Hildred underscored the current problems with the system and stated that the proposals presented by the Commissioner had been received very favorably by the Congressional subcommittee. She indicated that the subcommittee would hold hearings on the Commissioner's proposals for process improvements this spring and that they were interested in hearing from various stakeholders. Carol Peterson indicated that there was a 13% turnover rate for DDS's and that nearly one-half of all DDS Directors have said that one-quarter of their examiners need additional training in areas



Monroe Berkowitz

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Carol Peterson, Kim Hildred, Ronald Leopold, Monroe Berkowitz, Bob Rich, and Martin Gerry.

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Jamie Kendall of NISH.

critical to disability decision-making. She highlighted the need for long-term comprehensive work force planning.

Session Two: Return to Work

The second session focused on return to work issues. Pam Mazerski, Associate Commissioner, Office of Program Development and Research, gave the overview presentation. She began by sharing statistics describing the diverse characteristics of SSI and SSDI beneficiaries by age group and the complexity this poses to return to work programs. She summarized several SSA work incentive initiatives including Return to Work, PASS, Early Intervention, and the Youth Demonstration Project.

After Ms. Mazerski's overview presentation, panelists Ed Yelin, Institute for Health Policy Studies, University of California San Francisco; Doug Kruse, Professor, Rutgers University; David Stapleton, Senior Research Associate, Center for Policy Research, Cornell University; and Judith Cook, Director, Mental Health Service Research Programs, University of Illinois at Chicago each addressed the policy question: *Can the Ticket to Work Program be modified so that it meets the needs of all beneficiaries, or should SSA continue to develop other return to work programs?*

Ed Yelin summarized economic and occupational factors affecting the employment of individuals with disabilities and emphasized the current low rate of return to work. Doug Kruse pointed out that persons with disabilities who work, as compared to workers without disabilities, are more likely to have part-time and temporary jobs, are less likely to have employer-provided pensions or health insurance, and are more likely to live in poverty. David Stapleton suggested that the Ticket to Work program was a sound concept but that its effectiveness was being limited by an existing set of complex and incompatible work incentive programs. Judith Cook highlighted the particular needs of persons with



Trudy Mallinson, Judith Cook, David Stapleton, Ed Yelin, Doug Kruse, and Pam Mazerski.

psychiatric disabilities and return to work programs, which included continued access to health care.

Session Three: Youth and Transition to Work

Session three began with an overview on youth and transition to work issues by Michael Callahan, President, Marc Gold and Associates. Mr. Callahan described the Mississippi Youth Demonstration Project, one of seven projects funded by SSA to propose innovative strategies to increase the rate of youths with disabilities transitioning to work. An important component of the Mississippi program will be schools and vocational rehabilitation programs working closely together in a “one stop system,” and focusing on employment in curricular offerings as young as late elementary school.



David Collins (EdM, UIUC '79).

Following the overview presentation, panelists Pamela Loprest, Senior Research Associate, The Urban Institute; Troy Justesen, Acting Deputy Assistant Secretary for Special Education and Rehabilitative Services; Elizabeth Powers, Associate Professor, Institute of Government and Public Affairs, University of Illinois at Urbana-Champaign; David Johnson, Director, Institute on Community Integration, University of Minnesota; and Eileen Sweeney, Senior Fellow, Center on Budget and Policy Priorities each addressed the policy question: *What are the most important issues for SSA to address in order to help SSI youth with disabilities maximize their economic self sufficiency?*

Pamela Loprest highlighted aspects that need to be considered in discussions of youth transition including age 18 redetermination of eligibility, the complexity of current incentive programs, and access to work preparation services for youth. She pointed out that access to vocational rehabilitation is limited and that working can mean loss of Medicaid benefits. Troy Justesen reviewed Office of Special Education Rehabilitative Services opportunities and emphasized their increasing collaboration with other federal agencies. He pointed out, as an individual with paraplegia who has been supported by these programs, that pessimism about their potential for success was unwarranted. Elizabeth Powers shared data indicating that SSI youth who are paralyzed or blind transition to work at higher rates than other groups and that there is much to learn from their experiences. David Johnson shared that the expectations of educators, other professionals, and parents regarding the capacity of youths with disabilities to work need to be addressed as an important part of program success. Eileen Sweeney recommended consideration of extending Medicaid coverage whenever it is needed and disregarding SSI children's income from the SSI support payment calculation.



David Johnson and David Mank.

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Session Four: Ticket to Work Program

Marianne Daley, Acting Associate Commissioner, Office of Employment Support Programs, presented the fourth overview on the Ticket to Work Program. She shared that all states are now participating in the Ticket to Work program and she provided the most recent data on the Ticket program. To date, 40,000 Tickets have been assigned, 9 million tickets

have been sent, and 1,100 Employment Networks (ENs) are under contract with SSA. She suggested that issues warranting further consideration include enriching milestone payments, shortening the pay period, and ensuring optimal relationships between vocational rehabilitation and employment networks.

Following Ms. Daley's presentation, panelists Sarah Wiggins Mitchell, President/Executive Director, NJ Protection and Advocacy, Inc., and Chair, Ticket to Work and Work Incentives Advisory Panel; Paul O'Leary, Economist, Social Security Administration; Bob Steggert, Vice President, Casualty Claims, Marriott International, Inc.; David Mank, Director, Indiana Institute on Disability and Community and Chair of the DRI's Adequacy of Incentives Advisory Group; and Bobby Silverstein, Director, Center for the Study and Advancement of Disability Policy and member of the Adequacy of Incentives Advisory Group addressed the policy question: *What steps should SSA take to expand competition among providers? What role should Vocational Rehabilitation play in Ticket to Work programs?*

Sarah Wiggins Mitchell emphasized the need to increase EN participation in the Ticket program through examination of the payment system, and program marketing. Paul O'Leary shared data from

the Ticket to Work program evaluation. He reported that EN participation was below expectations and vocational rehabilitation was the largest participator in the program. Bob Steggert shared features of the multi-disciplinary approach Marriott uses to facilitate return to work for employees with disabilities. He emphasized the necessity to build trust through progressive interactive intervention. David Mank reported the recommendations of the Adequacy of Incentives Advisory Group with particular emphasis on the four targeted groups: those who need ongoing supports and services, those who need high-cost accommodations, those who earn a sub minimum wage, and those who work and receive partial cash benefits. He summarized the principles that were adopted by the Group, which



Top: Pam Mazerski.
Bottom: Michael Kanp (on right) and colleague.

include broader participation by beneficiaries and ENs and fairly shared risk among ENs and SSA. Bobby Silverstein presented the Advisory Group's recommendations, which include rewarding partial self-sufficiency not just full self-sufficiency, eliminating the difference in payments between SSI and SSDI, narrowing the gap between outcome and outcome-milestone payments, and enhancing cooperation between vocational rehabilitation and ENs.

The results of completed DRI research projects were displayed in a poster session during lunch and throughout the afternoon. Researchers with completed projects were available for discussions of their projects and results. Posters of DRI ongoing research projects were also displayed, giving participants the opportunity to read about other research being conducted by the Institute.

The next DRI Symposium is planned for Spring 2005.



*Top: Mary Grace Kovar and Mitch LaPlante.
Bottom: Carol Peterson.*

Symposium Presentations Online

Visit the DRI website to access the presentations from the 2004 Symposium. The presentatins are available to view online or download to your local computer.

www.dri.uiuc.edu



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DRI News
Spring 2004
Volume 4 Number 1
Editor: Kent Reel

DRI News is published semi-annually by the Disability
Research Institute. Requests for additional copies can be
submitted to the address above.

U.S. Social Security Administration (SSA)

Office of Disability and Income Security Programs

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