



Work Incentives Transition Network (WITN)

Supplemental Security Income Work Incentives and Transition Students: The Role of School Personnel

The successful transition of students with disabilities from school to work and independent living is a focal point of the Individuals with Disabilities Act Amendments of 1997 (IDEA). Transition planning for students with disabilities is a critical element of each student's IEP beginning at age 14 (or younger, if appropriate). IDEA 97 defines transition services as

“a coordinated set of activities that is designed within an outcome-oriented process which promotes movement from school to postsecondary activities, including postsecondary education, vocational training, integrated employment, continuing and adult education, adult services, independent living, or community participation.”

A number of transition age students receive or may be eligible to receive Supplemental Security Income (SSI) benefits administered by the Social Security Administration. Providing monthly cash payments, SSI can be a valuable resource to eligible students and their families. The SSI program can also assist school personnel in meeting their responsibility to link transition students with adult service providers and support systems that will enhance a student's post secondary opportunities to participate in employment and independent community living.

SSI Work Incentives

All students receiving SSI benefits are eligible to participate in SSI work incentive programs. SSI work incentives allow individuals with disabilities, including students, to deduct certain work related expenses from their income in order to maintain SSI eligibility. SSI work incentives available to transition age students with disabilities include Earned Income Exclusion (EIE), Student Earned Income Exclusion (SEIE), Impairment-Related Work Expense (IRWE), Plan for Achieving Self-Support (PASS), and Blind Work Expenses (BWE). While not as applicable to secondary education students, the work incentive Property Essential for Self-Support (PESS) may also be considered in the transition planning process as a postsecondary option.

For a student with a disability to benefit from these work incentives, she/he must be receiving or eligible to receive SSI cash benefits and engaged in

work experience as part of the transition plan. Planning for the use of SSI benefits and incentives early in the transition process can provide excellent opportunities for students, families, school personnel, and other IEP/transition team members to identify and explore employment opportunities while a student is still in school.

SSI work incentives can be an important source of support for individuals making the transition from school to employment, yet they are underutilized. There are estimates that as many as one half the students with significant disabilities over the age of 18 are not receiving SSI benefits. School personnel can play an important role by assisting eligible students and families to secure SSI benefits and access the work incentives.

The Role of School Personnel

School personnel responsible for the successful transition of students from school to work and independent living can perform several functions to support the use of SSI work incentives as a viable part of transition planning. Specifically they can:

1. Identify students who are currently receiving SSI benefits and students who may or will be eligible.
2. Inform students and parents about SSI program benefits, eligibility requirements, and work incentives when transition planning begins and throughout a student's transition program.
3. Incorporate SSI work incentives in the IEP/transition planning process.
4. Assist students and parents in the SSI application process and provide appropriate documentation on a student's disability, limitations, performance, and behaviors that will help SSA in determination or redetermination of eligibility.
5. Establish a close relationship with local SSA staff to facilitate communication among students, parents, school personnel, adult service providers, and SSA staff.
6. Link SSI work incentives to the transition curriculum, including teaching self-advocacy.

1. Identify Potentially Eligible Students

SSI eligibility is a gateway to a variety of resources for transition students with disabilities, including Medicaid. Eligibility requirements of SSI benefits are established by the Social Security Act and its regulations. A student must meet both income and disability eligibility requirements to receive SSI benefits.

Income Eligibility. SSA income eligibility is based on the age of the student. If a student is under the age of 18 his/her parent's income and resources are considered in establishing eligibility for SSI. Income requirements vary depending on the number of parents and children in the household. A general estimate is that two parents with one child with a disability and another who is not disabled can earn about \$34,000 before their child with a disability is ineligible for SSI benefits.

If a student is 18 years old or older his/her parents' income and resources are no longer a consideration. As a result, a number of students will become eligible for SSI benefits when they reach the age of 18.

Disability Eligibility. SSA has criteria for deciding if a person is disabled under the requirements of the SSI program. These are not necessarily the same as the criteria applied by schools in the identification of students requiring special education services: a student may be considered as disabled under IDEA but not under the Social Security Act. Some disabilities (e.g., blindness, hearing impairments, significant speech impairments, mental retardation and autism as measured by an IQ less than 60, Cerebral Palsy with severe motor involvement) can be assumed to meet SSA's criteria. Students who exhibit cognitive and emotional problems that will interfere with their ability to work may also be eligible.

For each student engaged in transition activities, school personnel should always know whether a student is:

- ◆ currently receiving SSI benefits.
- ◆ potentially eligible for SSI benefits but not receiving them.
- ◆ eligible for SSI benefits at age 18.

2. Inform Students and Parents of SSI Program Benefits and Eligibility and Work Incentives

School personnel can introduce and explain SSI

work incentives to students and parents during the early stages of transition planning. Successful transition planning requires that school personnel, students, parents, and adult service providers work together to design a sequence of activities that will lead toward community participation and employment when a student exits school.

Typically community-based vocational education will be a focus of the initial transition discussions. Introducing work incentives early in the transition process establishes paid employment as a viable transition goal and allows students, parents, and other IEP/transition team members to broaden their collective thinking regarding available resources and the potential benefits of work incentives. Just as school personnel inform students and parents about vocational rehabilitation and other adult services, so should they inform parents and help them gain knowledge about the SSI program eligibility requirements, benefits, and work incentives.

3. Incorporate SSI Work Incentives Into the IEP/Transition Planning Process

Incorporating SSI work incentives into a student's IEP/transition plan can provide excellent opportunities for students, parents, and other IEP/transition team members to explore employment opportunities while the student is still in school. These incentives can also benefit students after they are out of school. To be eligible for SSI work incentives, a student must be receiving SSI benefits and be engaged in **paid employment** as part of their transition program. It is important to explore and include work incentives into a student's transition plan. This will assist students and parents in identifying specific steps that will be required to allow students to establish postschool goals and objectives and participate in school-sponsored employment opportunities. The use of work incentives will help assure parents that a student's working for pay will not endanger his/her SSI status. SSI work incentives can also help students plan for and save money toward a future career goal. Participating in SSI work incentives may allow students in paid employment to increase their monthly income while retaining their SSI benefits.

4. Assist Students and Parents in Applying for SSI Benefits

Many students and parents are unfamiliar with the SSI program and its application procedures and requirements. School personnel can refer students and parents to appropriate SSA representatives and assist them in completing the SSI application. It

is **very important** that school personnel respond to SSA's request for information on students. SSA Disability Determination Offices contact school personnel seeking assistance in gathering school records and other data that they feel will be helpful in making eligibility determinations. Parents have given SSA permission to request this information and if it is not provided it can cause untimely delays for the student and their families.

5. Establish a Cooperative Relationship with the Local SSA Staff

SSA staff are experienced in assisting youth with disabilities and their families in applying for SSI benefits and work incentives. Many SSA offices have specific staff assigned to work with transitioning youth and the SSI program. It is important for school personnel to establish a rapport with these individuals. This will assist school personnel, the student and his/her parents in incorporating SSI benefits and work incentives into the transition program.

Summary

Current studies indicate that fewer than one-half of transition-age students eligible for SSI benefits, including work incentives are participating in the program. SSI benefits and work incentives can provide valuable supports to transition students both while in school and after graduation. Work incentives enable students to be pro active in obtaining training, support, or services critical to enhancing their employment opportunities.

To profit from work incentives students must be receiving or eligible to receive SSI benefits and be involved in employment as part their transition program. It is important that school personnel understand SSI eligibility requirements so they may assist eligible students and parents in securing SSI benefits, including work incentives, and incorporate work incentives into the transition planning process. School personnel can provide valuable assistance to students and parents in promoting self-advocacy and paid employment through the use of SSI work incentives.

Further Information

A more in-depth discussion of SSI work incentives is available in *Meeting the Needs of Youth with Disabilities: Handbook on Supplemental Security Income Work Incentives and Transition Students* which is available from the Institute on Community Integration, University of Minnesota.

Further information about SSI and work incentives is contained in the publication *Red Book on Work Incentives: A Summary Guide to Social Security and Supplemental Income Work Incentives for People with Disabilities*. You can get a copy free from your local Social Security Office, or by calling the Social Security Administration's toll-free number: 1-800-772-1213.

The following web sites may also be helpful:

Social Security Administration

www.ssa.gov

WITN

www.vcu.edu/rrtcweb/witn/ssi.htm

Center for Psychiatric Rehabilitation

www.bu.edu/sarpsych/ssawork.html

Program on Employment and Disability, Cornell University

www.ilr.cornell.edu/ped

This summary was developed by:

Michael Norman
The Study Group Inc.
209 Sir Walter Raleigh Drive
Kill Devil Hills, NC 27948
(252) 441-2788
in partnership with:

The Institute on Community Integration
University of Minnesota
102 Pattee Hall, 150 Pillsbury Drive, SE
Minneapolis, MN 55455
(612) 627-4135
(612) 627-4030 (fax)

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Institute for Community Inclusion

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Institute on Community Integration

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**Institute on Community Integration/UAP
University of Minnesota
102 Pattee Hall, 150 Pillsbury Drive, SE
Minneapolis, MN 55455**

