Employment 1st and the Work Incentives Navigator
What will we discuss today?

• Employment First
• The Employment First Work Incentives Navigator (WIN) Tools
• WIN Homepage
• 1619(b)
• Medicaid-Buy-In for Working People with Disabilities (MBI-WPD)
• Earned Income Tax Credit (EITC)
• Resource Page
• TTW
E1 Report Goals

• New York’s Employment First Targets
  – *Increase the employment rate by 5%*
  
  – *Decrease the poverty rate by 5%*
  
  – *Register 100 businesses that have formal hiring processes to improve the inclusivity of their workforce*
E1st Recommendations # 4 & 5

- Recommendation #4: Develop a statewide benefits advisement tool

- Recommendation #5: Address the gaps in usage of the MBI-WPD
  - We have expanded the original goal to promote 1619(b) as well.
Employment First

• How are we using NYESS to accomplish this goal?
  – Key Data:
    • Active records for your customers
    • E-mail addresses
    • Benefit information (Programs and Public Assistance)
    • Jobs Info
    • Work History
  – External Data
    • Medicaid
    • Wage Data
Entitlement Support / Work

- Phase 1: Wage Reporting, 1619b, Medicaid Buy-In, EITC

- Phase 2: Student Earned Income Exclusion, Section 301, IRWE

- Phase 3: Benefits Planning Portal, Able Accounts, PASS
Work Incentives Navigator (WIN)

• How will this process help New Yorkers with disabilities?
  – Improve awareness of incentives
  – Continue to push against common myths related to earnings and benefits
  – Link directly to powerful and accessible resources
Work Incentives Navigator

- NYESS customers will be alerted via e-mail if we have data indicating they have earned wages.
- Using various data sources we can target the letters to include specific programs they may be eligible for:
  - 1619(b)
  - MBI-WPD
  - EITC
- The e-mails will contain general information and links to important resources.
Welcome to the Work Incentives Navigator (WIN). The WIN has been designed to send automatic notifications to individuals with disabilities who are receiving employment supports, as well as to the service organizations who serve them. At this time, NYESS has developed notifications for three critical benefits: Medicaid Buy-In for Working People with Disabilities, Section 1619(b) of the Social Security Act, and the Earned Income Tax Credit (EITC). This portal has been created so that individuals who receive(d) notices, can then receive assistance from your organization, and are able to take advantage of these programs. Click on the Notifications tab in the top left corner of the screen to view a list of individuals who may benefit from these programs. For assistance pertaining to these notifications or related programs please email nyess@onni.ny.gov or call 518-473-6579.

SECTION 1619(b)
Section 1619(b) of the Social Security Act provides some protection for SSI beneficiaries who return to work and earn up to $43,364 without losing their Medicaid coverage. This means that SSI beneficiaries who have earnings too high for a SSI cash payment, may be eligible for Medicaid if they meet the above requirements. SSA uses a threshold amount to measure if a person's earnings are high enough to replace his/her SSI and Medicaid benefits. Notices on potential eligibility are sent to all individuals that NYESS believes meet these requirements.

Medicaid Buy-In for Working People with Disabilities
The Medicaid Buy-In for Working People with Disabilities is a program that allows working New Yorkers with disabilities to earn up to $60,420 without the risk of losing their Medicaid coverage. In New York State, people with disabilities can continue working, or return to work without fear of losing their essential health care coverage through Medicaid. Traditionally, New Yorkers with disabilities have had to limit their wages, or pay high “spend-downs” to retain or access Medicaid. Through New York State’s Medicaid Buy-In program for Working People with Disabilities, they will no longer have to do either. Notices on

EITC
The Earned Income Tax Credit (EITC), is a tax benefit designed for people who are working and are earning a low to moderate income. To qualify for EITC, an individual must have earned income from working for someone or from running or owning a business or farm, and they must also meet basic program rules. In addition, the individual must either fulfill the requirements for workers without a qualifying child or have a child that meets all the qualifying child rules for the individual. If accessed, this tax credit can provide significant resources to an individual that may assist in their overall self-sufficiency. Notices on potential eligibility are sent to all individuals that NYESS believes meet these requirements.
Welcome to the Work Incentives Navigator (WIN) notifications page. Below you will find a list of some of the individuals your agency has supported in their pursuit of employment. Using available NYESS data, we have sent notifications to these individuals regarding programs and services we believe may be beneficial to them. We are asking that you utilize the list below to follow up with each person and further assist them on their path to greater independence.

Note that you can expand each record to view an individual’s notification history by clicking the plus sign at the beginning of a line. Once a row has been expanded, you will see a list of the specific notifications which were sent and the program type we are recommending the individual explore. If the “Action” button is active for a row you may click it to produce a supporting document for the recommended program. The notification date field indicates when the e-mail was sent to the individual. If the notification date field contains “Not Sent”, no e-mail was sent to the individual due to an issue with the e-mail address in NYESS. We encourage you to reach out to the individual.

If you would like assistance using this system, please e-mail nyess@omh.ny.gov or call 518-473-6579.
### WIN Notification Page

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</table>

Total Items: 10340
E-Mail Template

September 13, 2017

Dear NYESS Customer,

Did you know that you can earn over $45,000 and still be eligible for Medicaid after losing SSI cash payments?

As an official representative of New York State government who partners with you and your community service providers, we want to make you aware of tools to maximize your income, and to counter common myths about how working affects your cash benefits and health insurance. There are many programs and incentives available to New Yorkers like you, who want to work and maintain supports.

- To learn more about 1619 (b) Medicaid, which will allow you to earn up to $45,452 and keep your Medicaid, click here
- If you want to earn up to $61,332 and have significantly higher savings and resources than 1619(b) allows, while keeping your Medicaid free of charge, then click here to learn about the Medicaid Buy-in for Working People with Disabilities
E-Mail Template

- To assist you in reporting your wages and avoiding overpayments click [here](#).
- For information on all the available tools and incentives to improve your financial future, click [here](#) to visit the Social Security Administration’s Red Book.
- To connect to a Disability Resource Coordinator or one of our provider partners, click [here](#).
- To connect to a WIPA program for free benefits counseling services, click [here](#).

The New York Employment Service System (NYESS) looks forward to helping you and other New Yorkers on the path towards increased independence, while keeping benefits you are entitled to along the way. Visit our [NYESS Customer Resource Page](#) to learn more.

*You can work! We can help!*

Sincerely,

John B. Allen
WIN

- **What can you as a provider do to help?**
  
  - *Ensure the customer has a valid e-mail address in NYESS!*
  
  - Become generally familiar with the major incentives, especially pertaining to SSA benefits and Medicaid
Wage Reporting

• If you receive any benefits through the Social Security Administration, it is imperative that those wages are reported!

• If wages or other income related information is not reported to SSA, overpayments can occur, which means you may owe money to SSA
Wage Reporting

• Work with an advocate or certified benefits practitioner to ensure that you have good communication with your claims representative to ensure timely reporting and benefits changes

• Wages should be monthly unless otherwise stated by your claims representative

• If you receive SSI and SSDI, separate wage claims may have to be reported
What is 1619(b)?

- In NYS, Supplemental Security Income beneficiaries who receive at least $1 qualify for Medicaid.

- 1619(b) allows SSI beneficiaries who lose SSI cash payments due to wage earnings to keep Medicaid.
What is 1619(b)?

- What is the eligibility criteria?
  - Continued disability
  - Have been eligible for SSI cash payment or 1619(b) within the past 12 months
  - Unearned income and resources within SSI limits
  - Meet a Medicaid use test
  - Earn below the $45,452 per year individual threshold
How is 1619(b) activated?

• 1619(b) *should* be activated automatically once the SSI cash payment is reduced to zero

• This is another reason you want to ensure clear communication with your local SSA office
  – Work with an advocate or certified benefits practitioner to make sure 1619(b) is activated
What is the MBI-WPD?

• Medicaid Buy-In for Working People with Disabilities

• Allows individuals with a qualifying disability who are working to obtain free Medicaid

• Earn an annual income of up to $61,332
How does someone obtain MBI-WPD?

• Use the toolkit!
  – Medicaid Buy-In program for Working People with Disabilities Toolkit

• Following the steps in the toolkit will help you answer whether the MBI-WPD is right for you and what type of specific information to you need to complete the application
How do I know if I’m eligible?

- First, ask yourself these questions*:
  - Are you working?
  - Are you a resident of NYS?
  - Are you between the ages of 16 and 64?

*If you answered “no” to any of these questions, you are not currently eligible
What information will I need to compile?

- Have you been determined to be disabled by SSA?
  - If not your disability status will be reviewed by SSA
  - The toolkit has a Medical Evidence List that can help you determine what is needed to support your disability status

- Are you a U.S. Citizen, a National, or a Native American?
  - Documentation will need to be presented to DSS
Earned vs. Unearned Income

- SSA uses a budgeting formula that looks at both
  - Earned income is payment from a work activity
    - Wages
    - Salaries
    - Tips
  - Unearned income is payments you haven’t worked for
    - SSDI
    - Veterans Benefits
    - Bank Interest
Resources

• Limit of $20K for an individual
• Use the toolkit to find specifics on what category a resources falls in to
• Generally, the list of countable resources includes:
  • Cash
  • Checking/Savings Accounts
  • Stocks/Bonds
  • Properties that are not your home
Resources

- Exempt Resources
  - The home you live in
  - Your Vehicle
  - PASS Plan
  - Life Insurance
How do I submit the application?

• Completed applications will be submitted to your local DSS office

• If you live in NYC, the application will be submitted to the local HRA office
How do I submit the application?

• *Be prepared to advocate!*
  – Many DSS or HRA staff have little to no experience handling MBI-WPD applications
  – To help mitigate this, and to assist you with the application, be sure to work with an advocate or certified benefits practitioner
Earned Income Tax Credit

• *What is it?*
  – Refundable tax credit for eligible low-income workers with and without disabilities
    • If you meet eligibility requirements and do your taxes, the government might owe you money!
Earned Income Tax Credit

• What is the purpose?
  – Reduce tax burden on low income workers
  – It’s an incentive to work
  – The credit can supplement wages for eligible earners
Earned Income Tax Credit

• **Who is eligible?**
  – Earned and Adjusted Gross Income must be less than:
    • $15,010 for an individual with no children
    • $20,600 for a couple filing jointly
    • $39,617 for an individual with one child
    • $45,207 for a couple filing jointly with one child
Earned Income Tax Credit

• **Who is eligible?**
  – Earned and Adjusted Gross Income must be less than:
    • $45,007 for an individual with two children
    • $50,597 for a couple filing jointly with two children
    • $48,340 for an individual with three or more children
    • $53,930 for a couple filing jointly with three or more children
Earned Income Tax Credit

• *What is the potential credit?*
  – $510 with no children
  – $3,400 with one qualifying child
  – $5,616 with two qualifying children
  – $6,318 with three or more qualifying children
Earned Income Tax Credit

• *How to know if you’re eligible?*
  – Contact a Volunteer Income Tax Site (VITA)
  – Find the nearest site by calling 1-800-906-9887
Earned Income Tax Credit

• There are many more details about EITC

• Be sure to use a VITA volunteer and/or a credentialed benefits professional to determine eligibility and how to ensure you both get the money owed to you, and understand how it may impact your overall benefits
NYESS Resource Page

• What will be included?
  – Ticket-to-Work
  – Disability Employment Initiative
  – SSA Red Book
  – Paths to Success Brochures
  – JobZone/CareerZone
  – MBI-WPD
  – We Can Work/We Can Save
  – FAQs about working with a disability
Immediate Action Steps

• Update data on individuals in NYESS
  – E-mail/Address are critical
  – Programs and Public Assistance
  – Medicaid #
    • Located in the NYESS Info tab
Immediate Action Steps

• Wage reporting

• Prepare to look at the WIN reports to:
  – Assist with the activation of 1619 (b)
  – Assist with MBI-WPD application
Ticket to Work

Opportunity for Individuals and Providers
Who is eligible?

• 18-64
• Receiving SSI or SSDI
• Working at or above Trial Work Level (TWL) or Substantial Gainful Activity (SGA)*
• Anticipated to be working at or above TWL/SGA*

*Revenue is only generated when outcomes are achieved.
* SGA=$1180 per month; TWL = $850 per month
Why is assigning someone’s ticket a good idea?

• Can make an individual exempt from a continuing disability review while the ticket is active. Note: They will have timely progress reviews of their progress toward work.

• Individuals will receive important reminders/notifications on EITC, 1619b, Medicaid Buy In, Wage Reporting, and other work incentives

• Assigning the ticket does no harm to their benefits, including SSI, SSDI, or Medicaid

• When individuals reach milestones they are generating revenue for the employment services that they and their peers receive
Steps to Assign a Ticket
Ticket to Work Brochure

NYESS Participating State Agencies

- New York State Office of Mental Health
- New York State Department of Labor
- New York State Office of Alcoholism and Substance Abuse Services
- New York State Office for People with Developmental Disabilities
- New York State Commission for the Blind
- New York State Office for the Aging
- Adult Career and Continuing Education Services/Vocational Rehabilitation

NYESS assists your providers with tools to help enable you to work. New Yorkers of all abilities will be aided by NYESS.

For more information regarding your Ticket to Work, call: 1-866-340-7647 or 711/VTO call: 1-866-653-2503

Assigning Your Ticket to Work with the NYESS System

Choosing An Employment Network (EN)

My Ticket to Work Ticket Assignment Statement

I understand that by signing below, I will be using my Ticket with the NYESS System. I will continue to receive services from the service provider shown below according to the Individual Work Plan of record or as amended. I understand that I have the right to change my service from NYESS for any reason. I acknowledge that the information given to the NYESS Provider relating to me as a ticket holder is correct, and that I do willingly agree to assign my ticket to the NYESS System.

[Signature]

[Print Name]

[Date]

For more information visit www.nyess.ny.gov
Individual Employment Plan

Individual Work Plan Services:

Supports and Services to be Provided:
The AEN and I have agreed upon the supports/services checked or written below. Below we also explain the steps the two of us agreed to take to help me reach my vocational goal. This includes any referrals the AEN agreed to make to help me get services.

- [ ] Career Counseling and guidance (at a minimum, required during IWP development)
- [ ] Job search or placement services (required if not working)
- [ ] Job coaching / training
- [ ] Job accommodation assistance / planning
- [ ] Social Security benefits / Work Incentives planning
- [ ] Resume development
- [ ] Transportation planning assistance
- [ ] Referral to other services or support providers
- [ ] Training (specify source)

Conditions Related to the Success of my IWP:
- [ ] I will inform the AEN of changes in my contact information
- [ ] The AEN will contact me as needed to share information and determine my unmet needs (quarterly)
- [ ] I will inform the AEN of my earnings
- [ ] While I am working, the AEN will offer and provide me with ongoing employment support to help me keep working or refer me to others who can help me keep working.

The AEN and I have agreed to the other conditions described below (if there are no other conditions, please state that):

Projected monthly earnings in the next 12 months: $

Projected monthly earnings in the next 3-5 years: $

Projected number of hours: /week

Maximum distance beneficiary is willing to travel to new job: Miles

Continuing Employment Supports:
- [ ] The AEN will provide all agreed services for initial and ongoing follow-up supports (quarterly follow-up required)

Note: Long term follow-up supports imply that the AEN will provide supports that will help Ticket holders sustain SCA level employment.

Other services (please note additional services below):

http://www.nyess.ny.gov/docs/NYESS-IWP.pdf
NYESS Requirements

- Customer Detail
  - ✓ General Info
  - ✓ Additional Info
  - ✓ Programs/PA
  - ✓ Objective
  - ✓ Work History
  - ✓ Ed/Lic
  - ✓ Skills
  - ✓ Jobs Info
  - ✓ Activities

- TTW Tab
  - ✓ Date Ticket Assigned is entered
  - ✓ Date Employment Plan is developed is entered
  - ✓ All three “Yes” options are selected

- Services Section
  - ✓ Activating an Agency
  - ✓ Adding a Service
  - ✓ Funding a Service
Payments at a Glance
### MILESTONE OUTCOME PAYMENT METHOD

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<td>Milestone 1</td>
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<td>$242/mo. for up to 18 mos. = $4,356</td>
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*The payment rate in effect at the time the Milestone or Outcome is attained is the rate that will be paid for that particular month, regardless of when the payment request is submitted.

** Please contact the Payments Help Desk (at ENPaymentsHelpdesk@yourtickettowork.ssa.gov) for explanations to exceptions.

*** The 2018 monthly SGA amounts are $1,180 for non-blind and $1,970 for blind individuals.

SGA for 2018 = $1180

TWL for 2018 = $850

Website: www.yourtickettowork.ssa.gov | Email: ENOperations@yourtickettowork.ssa.gov | Call: 1.866.949.3687 (toll-free)
What’s the Financial Impact?
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Next Steps
Agency Specific Analysis

Steps:

- Provider sends NYESS Unit a list of OSOS ID’s
- NYESS Unit – Analysis of field completion
- Comparison to SSA
- Report back on potential assignments
Local Area Training

Albany –
July 12th – 9am – 1pm
Office of Mental Health
44 Holland Ave – 1st FL – CIT Room
Albany, NY 12229

August 21st – 9am – 1pm
Office of Mental Health
44 Holland Ave – 1st FL – CIT Room
Albany, NY 12229

*Western NY is in the process of being scheduled.

NYC –
June 18th – 9:30am – 1:30pm
Office of Mental Health
330 5th Ave – 9th FL – Conference Room A
New York, NY

To Schedule Agency Specific Technical Assistance:

CONTACT US!
Resources

• New York Employment Services System
  – http://www.nyess.ny.gov/

• Employment First Press Release

• SOAR Employment Conversation Guide

• Employment and Economic Self-Sufficiency Tool Kit
Resources

• Think Beyond the Label
  – http://thinkbeyonddthelabel.com/

• SSA Red Book
  – https://www.ssa.gov/redbook/

• Employability Toolkit

• Job Zone
  – https://www.jobzone.ny.gov/views/jobzone/guest.jsf

• Career Zone
  – https://www.careerzone.ny.gov/views/careerzone/index.jsf
Questions?

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