



## Transcript of NCSET Conference Call Presentation

# Including Service Learning and SSI Work Incentives in Transition Planning

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presented by:

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**MS. SOCHA:** I think we'll go ahead and get started. Welcome to the National Center on Secondary Education and Transition's teleconference call. We're happy that you could all join us today. If you have any problems during the call you can hit pound zero while on the call and an operator will assist you. We're just going to run through some logistical things here. My name is Julia Socha and I'll be the moderator for today's call. We'd like to welcome you to the call. The presenters today are: Paula Sotnik and Jason Wheeler from the National Service Inclusion Project (<http://www.serviceandinclusion.org>); Ray Marzoli, Senior Analyst with the Office of Employment Support Programs (OSEP), Office of Employment Policy, Social Security Administration (<http://www.ssa.gov/work/>); Joani Werner, PASS cadre for Social Security (<http://www.ssa.gov/work/ResourcesToolkit/pass.html>); Kris Peterson, Training Coordinator with the National Center on Secondary Education and Transition-Youth and Family Participation Technical Assistance Network at the Institute on Community Integration-University of Minnesota (<http://www.ncset.org>); and myself, Julia Socha, Community Program Associate with the National Center on Secondary Education and Transition-Youth and Family Participation Technical Assistance Network at the Institute on Community Integration-University of Minnesota (<http://www.ncset.org>).

I'd like to remind you that when participating in the call, to reduce background noise and some

speakerphone interaction here, press mute when you're listening to the presentations. And when you ask a question, please announce your name and the state that you're calling from.

**MS. SOTNIK:** Hi.

**MS. SOCHA:** Hi Paula. Glad you could join us. You are our first speaker and you can go ahead now.

**MS. SOTNIK:** Terrific. Let me tell you a little bit about who we are and welcome to everybody who's on the call. And I'm calling on behalf of our project, the National Service Inclusion Project, (NSIP) (<http://www.serviceandinclusion.org>) is the training and technical assistance provider for the Corporation on National and Community Service (<http://www.nationalservice.org/>) focusing on the inclusion of people with disabilities as active members and active volunteers in community service. So our target audience is the community service national service programs and helping them to be more inclusive of people with disabilities.

We will provide whatever it takes. It could be just people calling us with a simple question, technical assistance question or mailing out materials. We have a number of different training vehicles that we use. We have regional trainings, we have state trainings and we have our basic menu and we develop, also, specialized training. So whatever it takes – for you need to know about assistive technology or accommodation, we're here for the programs. My colleague, Jason Wheeler, is actually going to be

joining the call later if there are any questions.

On the other side of the coin, we are also working with our disability systems and organizations to get more acquainted with national community services an option for people with disabilities. So we're working with all of our University Centers for Excellence on disabilities (UCEDD's) (<http://www.acf.dhhs.gov/programs/add/states/uap.htm>) to help them – to help us, actually, get the word out to independent living centers (<http://www.ncil.org/>) and community providers, including, as an option, service learning as a good opportunity for people with disabilities. So we're kind of working both sides of the coin, hopefully creating assistance down the line.

So I think that says it all. Julia and here colleagues were working on doing a Minnesota training coming up soon which will be our North Central Cluster Training sponsored by NSIP (<http://www.serviceandinclusion.org/web.php?page=activities>).

**MS. SOCHA:** I think that just about covers it. We will move on to Ray Marzoli. I just want to remind all of the participants that there will be an opportunity to ask questions after the presentation.

**MR. MARZOLI:** OK, good afternoon everybody. This is Ray Marzoli and I'm with the Social Security Administration (<http://www.ssa.gov>).

It's headquarters' in Baltimore, Maryland. Before we get talking about that topic, which was the student earned income exclusion, I just wanted to give a quick background on the program for which it belongs.

Actually the Social Security administers two disability programs. One is Social Security Disability Insurance (<http://www.ssa.gov/work/ResourcesToolkit/workincentives.html#ssdi>) that's – which provides benefits to people who have been working and paying taxes, primarily in Federal Insurance Contributions Act, FICA tax, ([http://www.ssa.gov/cgi-bin/cqcgi/@ssa.env?CQ\\_SESSION\\_KEY=XQICIVFXLCWHandCQ\\_CUR\\_DOCUMENT=2andCQ\\_RESULTS\\_DOC\\_TEXT=YES](http://www.ssa.gov/cgi-bin/cqcgi/@ssa.env?CQ_SESSION_KEY=XQICIVFXLCWHandCQ_CUR_DOCUMENT=2andCQ_RESULTS_DOC_TEXT=YES)) like your Social Security tax. And then there's the Supplemental Security Income (SSI) Program, (<http://www.ssa.gov/notices/supplemental-security-income/>) which is a cash assistance

program to individuals who are aged – that means sixty-five or over – blind or disabled.

In addition to people that are eligible for that program have to have limited income and resources. The federal government uses funds from the general tax revenues as opposed to the other programs that come from Social Security taxes. Some states supplement what the federal government pays for the SSI program. That varies from state to state. Some states have their own programs. Some states have Social Security administer it.

To be eligible (<http://best.ssa.gov/>), a person has to have a medical condition, unless of course they qualify as being of a 65. They have to meet our definition of disability or our definition for blindness. They have to fill out an application, be a resident of the 50 states, District of Columbia, or the Northern Mariana Islands. They have to file for any other benefits for which they are eligible. And they must be a U.S. citizen or meet the requirements of certain non-citizens.

The test for SSI is that the person has limited income and resources. And, basically, income we look at in one of two ways. Either it's earned, that the person is working or has a business or any other income. Sheltered workshops would be considered earned income, for example, because the person is working. But if someone is getting a Social Security benefit that would be considered unearned.

Anyway, basically, the federal government this year is paying \$545 to someone who is by themselves, an individual, or \$817 if it's a man and wife both eligible for SSI, the assets/ resources, have to be limited. Basically, resources are anything someone owns at the beginning of a month that they can convert to cash to be used for food, clothing or shelter. But we don't count everything that someone may have. For example, if someone lives in a house, we would not consider the value of that house when we decide whether they have limited income or resources. For the SSI, someone has to have \$2000 or less. For a couple, it would have to be \$3000 or less.

That's a very, very quick overview of what the SSI program is. Now I just wanted to go on to the student earned income exclusion (<http://www.ssa.gov/work/ResourcesToolkit/redbook.html#SEIE>).

As the name says, it's for individuals who are students who are working. And, primarily, it's for people who are under age 22. They cannot be married nor be the head of the household. And what the head of the household means is that they cannot be the person who's responsible for making decisions for the household. They don't have the rental responsibility, they don't have the mortgage responsibility, and they don't make any of the pertinent decisions for the people living in the household. If they do, they would be considered the head of the household and they would not be eligible for the exclusion. They have to be regularly attending school. For this year, with that – if someone who does qualify – what that means is we would not count up to \$1320 earned income in a single month when we figure the person's benefit SSI payment.

As I said earlier, someone can get up to \$545 from the federal government in SSI payment. So that the person in it could get – be earning over \$1,320 and get SSI as well. There is a maximum annual amount; that is \$5340 this year. And how that works basically is each month that we exclude the person's earnings that we don't – in other words, we don't count it when we compute whether the person's eligible for SSI or how much of the SSI payment they can get. We disregarded up to \$5340 in the course of the year. So if, for example, we actually disregarded \$1320 in a month for three months – four months rather, in their fourth month, they would have up the maximum for the year.

Regularly attending – as I said, the person has to be regularly attending school. That means they have to be taking one or more courses of study and attending classes either at a college or university for at least 8 hours a week or in high school or, actually, it could be middle school, grades 7 through 12 for at least 12 hours a week, or they have to be in a training course to prepare for employment for at least 12 hours a week or 15 hours if the course involves shop. Or for less time if there's reasons that are beyond the students' control, for example, the person's ill, they don't offer the courses that they want to take locally, so transportation may be a problem. And if the person's studying at home, which they can be, that could be acceptable as

being a regular – regularly attending school. And we apply this exclusion before we apply any of the other exclusions for the SSI program.

For earned income, the exclusions, as I said, it's the student earned income exclusion first, then we have the general earned exclusion of \$65 (<http://www.ssa.gov/work/ResourcesToolkit/redbook.html#EIE>).

Then after that it's one-half of whatever's remainder – above that amount; we count only one for every two dollars. There is some other exclusion that we might consider; one would be impairment related work expense (<http://www.ssa.gov/work/ResourcesToolkit/workincentiveschart.html#IRWE>).

That's where an individual has impairment and needs certain items in order to work because of that impairment and they pay for the – that item themselves. And when we do the computation, that would come before we do the one-half – the different – the remainder. In addition, we also have a blind work expenses (<http://www.ssa.gov/work/ResourcesToolkit/workincentiveschart.html#BWE>), any expense that someone who is blind incurs because of work. And that could be just, for example, just paying taxes would be an expense that they are incurring.

Anyway, we would deduct that after we do the one-half remainder. So there are several things that we do. I mean I realize it's difficult to visualize as we're talking on the phone, but there are several incentives that an individual can use to help reduce the amount of their earnings and still be eligible for SSI. And one of them we're we going to hear about that Joani's going to be talking about in a moment is a plan for achieving self-support (PASS) (<http://www.ssa.gov/work/ResourcesToolkit/pass.html>).

And I think at this time I, probably, will turn it over to Joani, if you could save your questions till the end, I think Julia has dedicated several minutes towards the end of the session for any questions. So I thank you and I'll talk to you later.

**MS. WERNER:** Hello everybody, my name is Joani Werner. I'm representing the St. Paul Pass Cadre (<http://www.ssa.gov/work/ResourcesToolkit/cadre.html>).

There are three of us here in our Cadre and

our job is to adjudicate PASS plans (<http://www.ssa.gov/work/ResourcesToolkit/pass.html>) and help people apply for this work incentive that SSI has. And let me tell you a little bit about it. A PASS plan is a SSI work incentive provision that allows an individual to exclude either income or resources of a person who is either blind or disabled and this person wants to be self-supporting.

So the ideal candidates that use a PASS plan is someone either using rehabilitation services (<http://www.ed.gov/offices/OSERS/RSA/index.html>); they use their local Division of Vocational Rehabilitation or rehabilitation services, whatever it's called in your state, they're in a training program of some sort, or they're going to school, they express an interest in becoming self-supporting or they're maybe in supportive employment situations, like job coaching. The other person who can have a PASS plan is that individual who would otherwise be denied SSI simply because they have excess income or resources.

Now, what a person has to do who wants a PASS plan is they have to have a work goal that's going to generate enough earnings to reduce their dependency on either SSI or Title 2 payments, which is a Social Security disability payment. They have to have a plan setup for a time period to reach a goal that they have, and list all the steps that they need to reach their goal. For example, buying a car or a computer is not an acceptable goal, but having the expense of a car because you're going to go to school each semester and you don't have transportation to get there, or you are going to go to school to become a social worker, and the expense would be the car, would be a really good goal for someone to have. They have to know what kind of expenses that they have that would make them self-supporting. They should be able to live on income – they should be able to live on the income that the SSI check would provide them, and they have to have other income other than just SSI or resources that exceeded our \$2000 limit. And a plan that they submit has to be in writing.

Now, the expenses that a PASS plan can help – a PASS plan again, is a plan for achieving self-support, is we're looking at individuals that have a goal and that have expenses like supplies to start a business. We see a lot of PASS plans for self-sup-

porting businesses. A lot of PASS plans include school expenses, tuition, and fees, books, that aren't covered by rehab or any grants or financial aid. Some PASS plans, a lot of them, are rent associated; we cover the two states of Minnesota and Wisconsin, for job coaching expenses. PASS cannot be used to pay for living expenses. The first PASS plan I ever wrote was one for child care expenses or attendant care expenses, equipment and tools to do the job, transportation back and forth from work or school, or uniforms. And there could be other expense, that's just some kind of examples that the person has to have.

Now, what a person does, if they want a PASS plan, is they would download the PASS plan off of our Web site, which is <http://www.ssa.gov/work> and I think there's a related site on this teleconference that lists that Web site. They fill out the form that's called SSA545 (<http://www.ssa.gov/online/ssa-545.html>), which tells you what the goal is, what kind of steps that will be taken to reach their goals and what kind of expenses they have. And they fill out that form and bring it into the local offices or send it to us and then their local PASS Cadre would contact them and help them see if they're eligible for a PASS plan or not. So that's about it, in a nutshell, about PASS. Ray, do you want to add anything to that?

**MR. MARZOLI:** No, we'll see if there are any questions.

**MS. WERNER:** OK.

**MS. SOCHA:** Well, we're going to move on to Kris Schoeller's part of this presentation. Following that, you'll have the opportunity to ask some questions and go through our discussions here and I will also make note of some other materials that will be available for you regarding this call. So we'll move on to Kris now, thank you.

**MS. PETERSON:** Welcome. I thought I'd take just a second to give people a little background too on why we actually got involved in this. The Institute on Community Integration (<http://www.ici.umn.edu>) here at the university back a couple of years ago had a grant to look at providing information to special Ed teachers and transition interagency teams to learn about the work incentives. That was in Minnesota here. I worked with

two different school districts and did two years of ongoing monthly training on this. And one of the reasons it came up was transition requires that teachers and interagency teams be looking at employment for people with disabilities. A lot of times there was such a strong fear from families that their kids would lose all their SSI benefits and Medicaid that they wouldn't let their kids go to work.

And so we developed some training for families on this and that's how this whole thing came about. We were looking at how do we educate people while working youth, starting at that age of 18 and working on, and then what are some ways that we could assure families and teachers and county social workers about what is out there that really is a safeguard and an incentive for these kids to get some a job experience and job training while they're still in high school.

I wanted to talk about how do use that IEP plan because I think sometimes we don't think about that as a good tool to actually informed the whole team who are working with kids in high schools and in transition programs and looking for programming for them. So I just want to say right up front to think of the IEP as a really powerful tool to promote education beyond a classroom.

The challenge I think has been – and it's been there since we first wrote the changes to IDEA to talk about transition, has been the whole shift from looking at doing remediation based on the disability versus doing future life plans with young people. And I think that's a first step to think about if you're going to start to work on using IEPs as it relates to work incentives and service learning opportunities. Let's start to think about moving away from the remediation component and thinking about a strength-based future adult goal orientation when you write the IEP.

I've always thought, even before we had this connection with Paula and with Julia's project here that service learning was an excellent way for a lot of kids with disabilities to get a sense of giving back to the community, to increase their academic skills, to get a sense that they can master something in their community and so we have been working with local high schools and kids here. Julia and I both, over the last five years, have tried to get more kids,

starting in early high school, involved in service learning projects.

It not only meets the transition requirements under either post secondary education, under jobs and job training, under community participation, under independent living, it can even actually fit into any kind of recreation or social component. And so it fits to all that but, in addition, for states that have developed their profiles of learning or higher grad standards, it also fits within those. Kids can meet those grad standards and profiles in their community and as part of their transition IEP planning process.

So I'm hoping that without visuals here you can get a picture that this is really a broader issue and a broader way to think about doing IEPs that's not just focused on remedial academic in classrooms to meet their goals, but if their future adult goal was to learn about occupations, AmeriCorps or service learning and other service learning opportunities might be a very good way to do it. And I think later, maybe even Paula or her partner who is coming online, can address some of the issues of transportation and support accommodations, if that is an issue that you're ready thinking about.

The other thing that I wanted to talk about was on some of the IEPs, in some states, there is also a section on activities. And you may not write the goal specific to "will write a PASS plan", although you could. It could also be put in an activity section of the IEP so they would make contact with a PASS Cadre or receive some assistance from someone who would help them write a PASS plan. I know that in all states there aren't PASS cadres that would go to IEP meetings, although Joani has been wonderful about saying she would, whenever possible, but I know that's not always possible. So it may not be that they become a team member, that someone from Social Security is not actually on the transition IEP team, but they can be a resource and a reference and be of assistance. A special education teacher could actually take a student to a Social Security office and learn the process of writing a PASS plan and of getting the student earned income exclusion implemented.

But there is service learning options in most states and sometimes they're attached to the De-

partment of Education and sometimes they're independent and they would be a good partner to be on a transition IEP team if it was a consideration. I would think about inviting them to that process to talk about what programs they have, what are some options, in terms of time commitments, how could those goals that they're going to meet also meet the grad standards and the transition goals on the IEPs, and make sure to discuss, all along the way, the accommodations and supports that would be needed because there's also a section on the IEP that would look at those accommodations and support. Also, including an objective or goal that looks at initiating that connection with Social Security in order to use the student earned income exclusions.

I did, and later you will have access to, on our Web site, just a very brief document we've put together that lists the figures that Ray was talking about but, also some goals and objectives. And I'm just going to read a couple of them. And I want to say that in Minnesota we did a screening a few years ago that used "I" language with transition aged youth to make this plan more their plans, so I'm going to read these goals as "I". In some states you might be using the persons named Tom will or Mary will. One of the goals I wrote was, "I will participate in AmeriCorps Program to increase my job and career development skills".

Some possible objectives under that would be, "I will develop a personal profile so that I can gather and build career interests and job development skills. I will meet with AmeriCorps or people and transition teams to learn about the multiple options in AmeriCorps service learning and make a list of options for my profile. I will meet with my special ed teachers and guidance counselors to decide which options best meet my educational needs and my career goals and preferences, as measured by my vocational and transition assessment information". Or a possible one will be, "I will meet with SSI workers to confirm that the student earned income will be applied and that I will not lose all my benefits".

I will put another one down as a possibility, "I will increase my community participation and social skills through a 10 month commitment to AmeriCorps working with peers to assist elders in

home improvement in the community".

What I'm trying to do is just give you a sense, not so much of exact wordings that you would use on an IEP, but a sense of how you would put that under the different areas. Both of those could go under the jobs and job training, could go under the postsecondary area, or could go under community participation areas of the transition IEP.

I think, once you see the computation tool, you'll see the benefits of having kids employed. I still think, even after two years of training in the two different districts that we worked in, there's still a fear among families and special education teachers that it's such a complex system to navigate that there is a fears that they'll do the wrong thing. And we're hoping through this next year, working with Paula and working with SSI, that we can get more kids out there utilizing the work incentives so they can build their skills for employment and more self-sufficiency.

So I'll turn it over to Julia.

**MS. SOCHA:** Right, I wanted to invite the presenters to make any final comments at this time that they would like to make. During the other presentations, you might have things that have come up so I will open that up first. And in a minute or so we'll go through how we're going to do the question answers portion. So I invite Ray and Joani and Paula, if you have any final comments right now.

**MS. WERNER:** Hi Julia, this is Joani, can you hear me?

**MS. SOCHA:** Yes.

**MS. WERNER:** Good. We're not having problems anymore.

**MS. SOCHA:** No.

**MS. WERNER:** Sorry about that, again, but you know one of the things that I wanted to point out is we wrote a lot of PASS plans because of student earned income is so high. If they're using the student earned income exclusion and then their wages go over that amount, we also write a PASS at the same time for when their wages go over that amount. So you can think creatively when you're using work incentives and maybe you could use both of the work incentives to help students reach their goals. You know, and that allows the students more flexibility in their earnings too, so they're not

so afraid of, “If I make over this certain amount then my earnings will be affected” because maybe they could use a PASS for the remainder of their earnings, so just combining that work incentive.

**MS. SOCHA:** Right, that’s a really good point, Joani.

**MR. MARZOLI:** Yes, this is Ray. I’ll just add to that point that Joani was making. The work incentives are not exclusive. I mean they all – many of them can be used at the same time. So you can have the student earned income, we have the general earned income, and then what I mentioned, a \$65 for earned income exclusion plus one half the difference and you can use a PASS. In certain instances you might also be able to use the impairment related work expense exclusion or the blind work expense exclusion.

So you know don’t fall into the thinking that if one works, that the other can’t work. Only think that way if all the income is negated because of one particular exclusion, then you don’t have to worry about the others, at least for the time being.

One thing I did want to add, which I didn’t mention earlier, people on SSI, in most states, receiving SSI also makes them eligible to receive Medicaid, or whatever the state offers for medical coverage. The one thing we didn’t get into is if someone is working and they file for SSI, unless they meet the requirements for being blind, they also have to meet the requirements for whether or not a disability. And that means that they need to meet the requirements for performing at substantial gainful activity (SGA) (<http://www.ssa.gov/OACT/COLA/SGA.html>).

And unfortunately, except for the impairment related work expense, all the incentives we’ve been talking about have no impact on that decision. But I didn’t discuss that because that’s a rather long – that’s probably a subject for another teleconference, talking about disability and how we determine disability and the impact of work on that.

**MS. WERNER:** This is Joani again, too. Teachers can look at PASS as they look at income. I want to say the trend is that there’s a lot of students, age 18, applying for SSI and they are turned down because they have more than the \$2000 limit

in resources and a lot of the resources they have is money that they’ve been saving for school. So a PASS also can be used to shelter the assets because they’re using them for school.

**MS. SOCHA:** Thank you. Paula, did you have anything further?

**MR. WHEELER:** Actually, this is Jason. I stepped in for Paula a little while ago.

**MS. SOCHA:** OK, thanks Jason.

**MR. WHEELER:** How are you?

**MS. SOCHA:** Good. Good.

**MR. WHEELER:** I actually just wanted to add in that we certainly can be a resource as people need additional information and to please feel free to call on us, as well as our Web site does have some information on this as well that people can access.

**MS. SOCHA:** Thank you. I’d now like to invite participants to ask questions and I’d just remind you to announce your name and the state that you’re calling from. And go ahead anyone that has any questions.

**MR. ZUER** (participant): Hello?

**MS. SOCHA:** Go ahead.

**MR. ZUER** (participant): Yes, this is Ralph Zuer. I’m the life planning coordinator in White Plains, New York.

**MS. SOCHA:** OK.

**MR. ZUER:** And I have a question regarding the use of the PASS plan and then the IEP, I thought that was very creative. And there was reference made by the presenter to the Web site where we might be able to use some sample goals and objectives and how this would tie into IEP and I wonder if we can get that Web address.

**MS. SOCHA:** Sure, we’ll be going through that as we give the closing comments. I didn’t want you all to get distracted by having to find these documents but just yesterday we were unable to get some of the breakdowns of if you were participating full and part-time in AmeriCorps, what that might look like, using a student earned income exclusion. That document is found on the National Center on Secondary Education and Transition’s Web site. That address, actually, right now is <http://www.ncset.org>

You’ll click on teleconferences and at the end of the teleconference flyer, which is much like what

you've received; you'll notice that there are two word documents below that. And you can sort of get a look at the goals and objectives section that we covered in this. There are some examples to give you to think of and then also the prospect for AmeriCorps registration so good question, thank you.

**MR. ZUER** (participant): OK. And could I ask one more? Because the conference call broke up a little bit when the first – I think it was Ray was speaking and he gave the parameters for students who can work. He gave some figures such as \$1320 a month is not counted. But prior to saying that he mentioned something about if you're a student – that means you are a student defined as being in college for eight hours a week, and what's the definition for a student who is in grades 7 through 12?

**MR. MARZOLI**: That's just a student, period. These are different types of – how you can meet the criteria for being a student. You could be in college for 8 hours a week or in grade school for at least 12 hours a week.

**MR. ZUER** (participant): 12 hours is the requirement for those students who are in the 7 to 12 category?

**MR. MARZOLI**: Right. Or in a training course for at least 12 hours or 15 hours if a shop – shop work's involved, but, again, you know, those are the criteria but we always allow if someone can't meet them because of situation beyond a control. You know, for example illness has curtailed their ability to attend school that much.

**MR. ZUER** (participant): OK, thanks.

**MR. MARZOLI**: If someone doesn't meet the, you know, those numbers, eight and 12, they certainly should still inquire because they might meet you know due to their circumstances. Or, for example, you might have a home tutoring and that could be acceptable as well.

**MR. ZUER** (participant): Thank you.

**MS. PETERSON**: There are also a lot of kids who are in -- are you working with the 18 to 21-year-olds?

**MR. ZUER** (participant): 14 to 21 hopefully.

**MS. PETERSON**: OK and some of the older ones aren't in like a school building, probably you have students who are out in the community, but

that still qualifies for a full-time student if they're in your program.

**MR. ZUER** (participant): OK.

**MS. PETERSON**: And if you want more ideas on goals and objectives – this is Kris – you can contact me at the university here too. Related to the PASS and student earned income.

**MR. ZUER** (participant): OK, and you'll give out numbers in the end?

**MS. PETERSON**: Sure.

**MR. ZUER** (participant): Thank you.

**MS. PETERSON**: Yes.

**MS. WERNER**: This is Joani. You also have a PASS Cadre, there's PASS Cadres you know throughout the nation in different cities, some that service New York. You have an excellent PASS Cadre that I think could give you some ideas on some PASSs that they wrote, with user sample PASSs and their number is also listed on the Web site that Julia's going to pass out at the end.

**MR. ZUER** (participant): Thank you.

**MS. DELIKLIO** (participant): Hello?

**MS. PETERSON**: Yes?

**MS. DELIKLIO** (participant): My name is Eadie Deliklio and I'm calling from Maryland. I had a question to Kris regarding, again, that creative use of the IEP plan and I'm curious as to whether you have any suggestions regarding getting that information in with the younger group. Where I work we tend to focus on the 11th and 12th graders versus starting in at the 14 year-old age.

**MS. PETERSON**: Sure.

**MS. DELIKLIO** (participant): And I was curious as to how we could, I guess, facilitate getting some of those PASS type goals written in the IEPs with the younger students as opposed to the folks who are nearing the end of their K through 12.

**MS. PETERSON**: Right. Well, I think it could – I actually believe it can start – even though they're doing this at age 14, if you have the option within your school program or if you don't, if you can rally for it, to have some community-based learning experiences as part of education for all kids, it really works great. But even if it's not for your whole student body, if you can get your school board or through your special ed programming, a way to infuse community-based learning so kids are

going out to different sites, whether it's to apprenticeship sites with employers or to a service learning, I don't think it has to start at 18, I think it can start at 14.

**MS. DELIKLIO** (participant): Yes.

**MS. PETERSON:** Does that answer your question?

**MS. DELIKLIO** (participant): It surely does. Thank you.

**MS. PETERSON:** OK. Any other questions?

**MS. MERMIGAS** (participant): I had one.

**MS. PETERSON:** OK.

**MS. MERMIGAS** (participant): My name is Diane Mermigas and I'm calling from Illinois. And the one of the frustrations we've had in trying to find resources for Behavioral Disorder (BD) categorized students because the disabilities are very different from probably most of the other ones. And I'm just wondering if any of you have any suggestions for resources either – in either area. Either in supporting students of high school age who are going to be transitioning from high school to you know the outside world, who are still in school and are trying to start getting some work experience. And then also, maybe resources for BD students looking for maximum therapeutic support or highly structured programs for starting the transition from that kind of a program in high schools into, say, college, where they would start taking classes and maybe still be working on the outside but they need a lot of therapeutic and structured support in the meantime. We're just having trouble identifying those kinds of resources.

**MS. PETERSON:** Is the person from AmeriCorps still on?

**MS. SOCHA:** Jason?

**MS. PETERSON:** Jason?

**MR. WHEELER:** I am.

**MS. PETERSON:** I wondered if you – I know that you you've got examples of working with that emotional behavior disorder and I wondered if you could address that at all.

**MR. WHEELER:** I'm not sure that I could address that right now, to be honest with you.

**MS. PETERSON:** What my suggestion is to, when you think about service learning for the kids that are labeled with the BD ...

**MS. MERMIGAS** (participant): Yes.

**MS. PETERSON:** I don't know what you're – you know what kind of program that you're working with, aside from the therapeutic, but if – the service learning doesn't have to be something that's already developed, so if you had – I mean think about it this way, you get with your core group you're working with and you know what the behaviors are. In fact, for some of the people that aren't in education, BD is behavior disorder. And you get together with your core group of kids and you're looking at what are their goals, what are their strengths, what are the behaviors that are going to prevent them from being successful, but then look at what is.

Maybe you could develop a site that becomes a service learning site that they are used to, that is already, as I say, enlightened, to working with kids with behavior disorders. And use that as part of their educational programming during the day, in addition to the therapeutic program. It might even include doing something within the same facility as the therapeutic program. I mean service learning doesn't have to be a site that someone established two years ago for a different group of kids. And that's probably where you could make a connection with Paula too, to talk about how you develop sites.

**MS. MERMIGAS** (participant): Yes.

**MS. PETERSON:** But that way it would give you more freedom and ability to match the kids to the site so the kid doesn't have to get a behavior under control before they can do this, that they are matched to a site where the behavior might not be a problem.

**MS. MERMIGAS** (participant): You know, that's definitely been the issue because some – I would imagine in many of these cases, the behaviors may never be under total control.

**MS. PETERSON:** Exactly, exactly. And that's why I really encourage that the site matches the kid, not where you have to have the kid gain something before they can do it.

**MS. MERMIGAS** (participant): Now what about this other issue though of trying to identify either college programs or college related programs that provide maximum therapeutic support and

structure for students who want to go from high school to college, maybe still work you know on the outside part-time, but really still need a lot of therapeutic and highly structured support. You know some kind of – either a college that caters to that, a live in college or a residential program that's affiliated with a college or ...

**MS. PETERSON:** To my knowledge, there is nothing of that's best out there at this point. Not that I'm familiar with every single program across the country ...

**MS. MERMIGAS** (participant): Yes.

**MS. PETERSON:** But what – a place that you could start to look to gather some more information is the University of Hawaii--National Center for the Study of Postsecondary Educational Supports <http://www.ncset.hawaii.edu/>

It's got a huge grant program that they're looking at developing a resource list of college programs that specifically make accommodations and add different kinds of support for students with disabilities. The person you could contact is Bob Stodden.

**MS. MERMIGAS** (participant): Bob Stodden?

**MS. PETERSON:** Yes, S-T-O-D-D-E-N. And if you contact Julia or I – actually, his name and e-mail is on our Web site. He's one of our partners.

**MS. MERMIGAS** (participant): Oh, OK.

**MS. PETERSON:** The other person is out of Oregon, is called the Do-It program (<http://www.washington.edu/doi/>)

They're doing a lot – it's mostly with technology.

**MS. MERMIGAS** (participant): Yes.

**MS. PETERSON:** But Cheryl Bergstahler may know something about any therapeutic programs attached to college.

**MS. MERMIGAS** (participant): Cheryl Bergstahler?

**MS. PETERSON:** Yes.

**MS. MERMIGAS** (participant): And she's at?

**MS. PETERSON:** University of Oregon.

**MS. MERMIGAS** (participant): OK. And she's also on your Web site?

**MS. PETERSON:** She should be, yes. She's another partner.

**MS. MERMIGAS** (participant): OK, thank you.

**MS. PETERSON:** You're welcome.

**UNIDENTIFIED CALLER:** Sorry to jump in there, partner on which Web site?

**MS. SOCHA:** It would be – this is Julia Socha again – it is found under the National Center on Secondary Education and Transition's Web site.

**MS. MERMIGAS** (participant): OK.

**MS. SOCHA:** And I'm sure you all the received the flyer that provides the link. And we'll do that towards the end of our questions to provide other links too that were given, so are there any further questions that are out there?

**MR. DUNLEY** (participant): Yes, this is Ed Myan in Tallahassee, Florida. Do you hear me?

**MS. SOCHA:** Yes, I do.

**MR. DUNLEY** (participant): I think my question might go towards Ray and its goes towards getting the IEP teams to sort of make that link with Social Security. Any thoughts on that, especially the teams that may not feel like this is – they haven't done this in the past.

**MR. MARZOLI:** Well, there are several things they can do. One, they can contact the local Social Security office. And they will be able to refer them to – either give them the information they need or refer them to other sources that may be able to help them. There are, as Joani mentioned, there are PASS specialists located throughout the country.

**MR. DUNLEY** (participant): OK.

**MR. MARZOLI:** And there is one in Florida, there are several in Birmingham, one in North Carolina just in your area. They are in, I think, approximately 15 states throughout the country. Some of them might be close enough by you can actually – you know people can meet with them, some, unfortunately, because our resources tend to be limited these days, they would have to contact them just by phone. That would be if they wanted information about PASS and just general information altogether. There are several sites – there aren't too many.

There was a pilot program; there are specialists who are very familiar with people trying to go back to work. They also are available. There are organizations on the outside of Social Security, have been set up to assist people who are thinking about going back to work and can provide some information. Their locations and phone numbers can probably,

I believe, be obtained through our Web site, which I think Julia will provide at the end. I think one is on the circular that went out as well, that was that [www.ssa.gov/work](http://www.ssa.gov/work). When someone goes there, there are several different elements they can look at, and one of them would be these organizations that have been, basically were promoted by legislation two years ago to be set up with the Social Security's help.

**MR. DUNLEY** (participant): OK. So if I understand you, I think you answered the question real quick there, to have the IEP team, if they contact Social Security, really – and ask for the PASS specialist.

**MR. MARZOLI**: That might be – in most locations, that would probably be the best person today.

**MR. DUNLEY** (participant): And I'm speaking from Florida, where contacting Social Security can be an effort sometimes.

**MR. MARZOLI**: Right, let me – if your situation – there's a toll-free number in Miami they can call. You can call 877-870-8693.

**MR. DUNLEY** (participant): OK.

**MS. WERNER**: And this Joani again from the St. Paul PASS Cadre, one of the best ways to do this is, because of release of information, you have to have either the client or the representative do the call, but what we do is we work real closely with some of the school districts around our service area here and say, "Call us first and we'll see if I can check about a PASS plan, you know, something that would work for your student or maybe another work incentive would work.

But let's see what the record looks like and maybe the client doesn't have any income that would fall into a PASS plan or maybe he's not an ideal candidate for a PASS, but let's talk about the case first with your client before you put it into the IEP to see if it's an actual thing that you write into. The other thing, instead of putting – you know, writing the IEP or putting the PASS plan into the IEP is to explore options of Social Security work incentives. This could be another way of looking at it instead of just defining it is a PASS plans also. So – but I think a phone call with your client there with you to say, "This is what my client's going to

be doing, can you give me any guidance on what Social Security has to offer my client to help reach his goals.

**MR. DUNLEY** (participant): OK, that sounds good. And I hate to be too simple but we're trying to get them to understand that this is out here to start with.

**MS. WERNER**: Yes.

**MS. PETERSON**: Ed, you know, another thing that's been working here and you might want to look at – I don't know if you have any transition interagency committees or anything, or transition conferences, but Social Security has been getting much more involved, and specifically Joani and her crew – or I shouldn't say her crew, sorry guys.

**MS. WERNER**: That's OK.

**MR. DUNLEY**: You've been promoted, Joani.

**MS. PETERSON**: They've been attending a lot of different kind of conferences and having booths and bringing their information and I think, in the past, part of the reason SSI was not represented was they actually weren't invited. So you might even just see if – look around your area and see if there's any conference, any transition committees that SSI people could be invited to.

**MR. DUNLEY** (participant): Yes, and that's actually I think what we're looking to make that connection here. I think we've made a huge step today.

**MS. PETERSON**: Great.

**MS. HENRY** (participant): This is Linda Henry in Montana.

**MS. PETERSON**: Hi Linda.

**MS. HENRY** (participant): And I just wanted to kind of backtrack a couple of conversations. And really promote or support the comments that were made about accessing the benefit planning specialists that are located in all of the states. You know, here in Montana our PASS Cadre is in Denver and so you know physically for them to be involved is – the likelihood is zero, just because of the distance, but through our benefit planning specialist that are located in the different states, you often have access to someone who's been pretty well trained by Social Security administration on the various working centers and how to incorporate them into PASS plans, and the kind of transition planning that should be

happening for young folks. And they are, you know, they're the folks that you can find on the Web site and there is someone in every state, at least one person, so it's a good route to go.

**MS. SOCHA:** Thank you for your comments. This is Julia Socha and we – what you'll notice on our Web site with this teleconference posting is that the document that we have on there with full and part-time AmeriCorps benefits and what you will receive and how you can use the work incentives, that was done in good partnership with our Work Incentive Connection (<http://www.mnworkincentives.com/>), as well as with Ray, so we utilized their great resources and they allowed us to do that, so they are a great partner to have. I wanted to ask if there is – we do have time for maybe one final short question and then we have some closing comments.

**MS. ADAM** (participant): This is Linda Adam . I'm in Michigan. I work with the AmeriCorps programs, I'm the disability coordinator, but my question is in regards to Learn and Serve. And I wonder if there's any potential for participation in Learn and Serve to, in any way, affect eligibility for Social Security benefits.

**MS. SOCHA:** Can you be more specific, – you mean the income for Learn and Serve?

**MS. ADAM** (participant): Well, there is no – there should be no income for a student to a participant for Learn and Serve.

**MS. SOCHA:** Oh so ...

**MS. ADAM** (participant): OK, one of the major – I'm going at this question for two reasons. One is one of the major issues with participation in AmeriCorps is not just the potential for income but the potential to be seen as no longer disabled because you're now being seen as able to work. And I'm coming from, you know, just count me as pure ignorant from the Learn and Serve standpoint. I'm looking at the – actually, at the national service inclusion project's Web site, and one of the things I noticed when looking up stuff for information on the AmeriCorps is that it talks about the possibility of participating in a Learn and Serve program and having it have, in some way, an effect on programs funded through Social Security. And I just wondered if anybody had any experience with that or ...

**MS. SOCHA:** Jason, if you're still on the call, is that something that you can answer? Jason Wheeler? OK, sorry, he must have dropped from the call. If any other presenters want to add something.

**MR. MARZOLI:** This is Ray. The only thing I can say at this point, in general, about people at AmeriCorps that Congress you know has determined certain organizations or certain groups whose – who may receive money, whether or not it's counted for SSI purposes, at this point in time, people who are receiving money from AmeriCorps, if they're working, generally its just counted as earnings as anybody else working. There has been talk, and this can always help you know if you get your clients to write their congressman, to exclude those kinds of earnings from consideration for SSI purposes. You know, that's not – that's not an unusual thing.

For example, money provided to Indians from the bureau of Indian affairs is – for schooling, is totally not considered. So you know there are – people have received money from funds – I guess there was – I'm trying to think of the one off hand. It just escapes me but there have been several funds that have been paid in the past that are paid to groups of people that Congress has decided those monies are not to be considered. And statements from AmeriCorps could certainly be included. Congress didn't do that when the program was created but you know they certainly can revisit it and rethink it. But again, if your clients are interested, you know, and they write their congressman, that kind of groundswell usually helps.

**MS. PETERSON:** Also, a quick thing about the accommodation, modifications you're providing while they're in the service. I know that there are kids who have done work in five years so that the question was raised. They are able to work should they be off SSI? But if we supported – because we document and show the support they received in order to be involved in that employment or that service learning, then it wasn't considered that they were able to work without support.

**MR. MARZOLI:** Well, that gets into a whole different topic as to what constitutes substantial gainful activity (SGA) (<http://www.ssa.gov/>

[OP\\_Home/handbook/handbook.06/handbook-0603.html](http://OP_Home/handbook/handbook.06/handbook-0603.html)).

**MS. PETERSON:** Right, right.

**MR. MARZOLI:** And that's you know something I think will probably be better off doing another one in the future.

**MS. PETERSON:** Another one ...

**MR. MARZOLI:** Another teleconference.

**MS. PETERSON:** OK.

**MS. SOCHA:** This is Julia Socha again. I want to thank you all very much for being on the call, both the presenters and the participants. We need to do a final closing here; we're right at 2 o'clock. If you have any further questions or things that come up I'd like to offer myself as a resource, as well as the others here. You can reach me by calling area code 612-624-2008 or e-mail at [washe004@umn.edu](mailto:washe004@umn.edu)

The next teleconference call that I need to make you aware of is on Tuesday, November 19th at 1pm Central Standard Time and is titled Communities of Practice. And I also would like to provide you with our Web site address, which I have throughout the call. That address is [www.ncset.org](http://www.ncset.org). And there are several links that were provided under each presenter's name on the teleconference flyer, which you can also access from our Web site. We want to thank you again and feel free to contact us with any questions. Have a great day. Thanks everyone.

**END OF TELECONFERENCE**

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## Full and Part Time AmeriCorps Income and Social Security Income (SSI) Benefits

This information is for Social Security Income ONLY. Please verify with Social Security what benefit program a student is on, some may be on concurrent Social Security Income (SSI) and Social Security Disability Income (SSDI). For those on Social Security Disability Income (SSDI), earning full time Americorp allowances will significantly impact benefits.

### Full Time

<p>\$960.00</p> <p><u>\$960.00</u></p> <p>\$ .00</p>	<p>approximate full time Americorp income for 10 month program</p> <p>minus the student earned income exclusion(MUST use the total Student Earned Income Exclusion for five months and then the remaining amount of \$540.00 for the sixth month and .00 for the remaining 3 months</p> <p>countable income</p>
<p>\$545.00</p> <p>\$ .00</p> <p><u>\$545.00</u></p>	<p>Full Benefit Rate for SSI (some students may NOT receive the full benefit rate because they are not contributing to household expenses. Use the amount that they receive if less than \$545 .</p> <p>minus countable income</p> <p>Social Security Income (SSI) amount</p>
<p>\$960.00</p> <p><u>\$545.00</u></p> <p>\$1,505.00</p>	<p>earned income from Americorps</p> <p>Social Security Income benefit amount</p> <p>total income for months #1-5</p>
<p>\$960.00</p> <p><u>\$540.00</u></p> <p>\$420.00</p> <p>\$ 20.00</p> <p><u>\$ 65.00</u></p> <p>\$335.00</p> <p>\$167.50</p>	<p>approximate full time Americorp income for 10 months</p> <p>remaining student earned income exclusion for month 6</p> <p>remaining countable income</p> <p>minus the general income exclusion</p> <p>minus the earned income exclusion</p> <p>divide by 2</p> <p>remaining countable income</p>
<p>\$545.00</p> <p>\$167.50</p> <p>\$377.50</p>	<p>Full Benefit Rate Social Security Income</p> <p>minus countable income</p> <p>Social Security Income Full Benefit Rate</p>
<p>\$960.00</p> <p><u>\$377.50</u></p> <p>\$1437.50</p>	<p>earned income</p> <p>Social Security Income Full Benefit Rate</p> <p>total income for month #6</p>
<p>\$960.00</p> <p>\$ .00</p> <p>\$960.00</p>	<p>approximate full time Americorp income for months #7-9</p> <p>no additional \$ for Student Earned Income Exclusion</p> <p>total earned income</p>

\$ 20.00	minus general income exclusion
<u>\$ 65.00</u>	earned income exclusion
\$875.00	divide by 2
\$437.50	total countable income
\$545.00	Social Security Income Full Benefit Rate
<u>\$437.50</u>	minus countable income
\$107.50	Social Security Income Full Benefit Rate
\$960.00	Earned income
<u>\$107.50</u>	Social Security Income Full Benefit Rate
\$1067.50	total income for months #7, 8, 9

**Part Time**

\$480.00	approximate monthly income 10 months
<u>\$480.00</u>	minus the student earned income exclusion (480.00 X10 =\$4,800 or the \$5,340 maximum for SEIE)
\$ .00	.00 income counted
\$545.00	Social Security Income Full Benefit Rate
<u>\$ .00</u>	minus countable income
\$545.00	Social Security Income Full Benefit Rate
\$545.00	Social Security Income Full Benefit Rate
<u>\$480.00</u>	Earned income from Americorp
\$1014.00	Total income

**Additional Resources:**

The Institute on Community Integration along with the National Center on Secondary Education and Transition has a variety of resources and publications on Social Security and work incentives for youth and adults with disabilities. Resources and publications may have changes based on changes to Social Security programs however much of the information is useful and still current!

*We invite you to search our Web sites:*

Institute on Community Integration  
<http://www.ici.umn.edu>

National Center on Secondary Education and Transition  
<http://www.ncset.org>

*Here are some additional resources that may be useful for you in relation to this topic:*

Social Security Administration-Office of Employment Support Programs Social Security and AmeriCorps  
<http://www.ssa.gov/work/Youth/ameriCorps.html>

Redetermination at Age 18 for Social Security benefits (fact sheet) by The Rural Institute on Disabilities  
<http://ruralinstitute.umt.edu/textrises/fact3x.htm>

*The following information may be useful to you as examples of how to document participation in national and community service opportunities on a student's Individual Education Plan (IEP):*

AmeriCorps can meet the goals and objectives under Jobs and Job Training, Postsecondary Education and Community Participation. It is also a very good way to meet the Graduation Standards within an educational setting.

**GOAL:**

I will participate in an AmeriCorps programs to increase my job and career development skills.

**OBJECTIVES:**

- I will develop a personal profile so that I can gather and build career interests and job development.
- I will meet with the AmeriCorps people and transition team to learn about the multiple options in AmeriCorps service learning and make a list of options for my profile.
- I will meet with my special education teachers and guidance counselor to decide which option best meets my educational needs and my career goals and preferences as measured by my vocational and transition assessment information.
- I will meet with SSA worker to confirm that the student earned income will be applied and that I will not lose benefits.

**GOAL:**

I will increase my community participation and social skills through a ten-month commitment to AmeriCorps working with peers to assist elders in home improvement in the community.

**OBJECTIVES:**

- I will list 5 social interactions with peers each week and discuss outcomes, including ways that I can improve my relationships with peers.
- I will learn about community resources for the future and make a list of all the agencies and resources that are available for youth and elders in the community.

*\*Please be advised that each individual's situation is different. This transcript is not all inclusive of individual situations and other benefit programs that may impact this issue. Please contact the Social Security Administration at <http://www.ssa.gov> for further resources and information or send us an email at [washe004@umn.edu](mailto:washe004@umn.edu) and we will do our best to assist you with issues related to this particular topic.*

*\*Please be aware that amounts are current as of October 2002. Please contact <http://www.americorps.org> and <http://www.ssa.gov> (Red Book) for updated financial amounts.*