

MEMORANDUM OF AGREEMENT

For SSA Benefits Planning Outreach and Assistance
Training and Materials and provision of BPAO services
For the University of Alaska Anchorage,
Center for Human Development.

The Alaska Works WINS Benefit Planning Assistance and Outreach (BPAO) Project addresses one of the major employment barriers affecting individuals with severe disabilities identified by Alaska Works--Alaska's current systems change initiative. Specifically, this project addresses the general lack of knowledge about and use of work incentives programs, and the lack of statewide access to benefits assistance and planning services. The intent of the WINS BPAO Project is to develop a statewide system of benefits planning and assistance services that assists SSA disability recipients to develop and implement a plan to enable them to achieve desired employment outcomes.

Scope of Work

The University of Alaska Anchorage Center for Human Development, A University Center for Excellence in Developmental Disabilities, Education, Research, and Service (UCEDD) contracts with qualified individuals (**not organizations**) to provide benefits planning and assistance services to individual SSA disability recipients on a fee for service basis.

Specific activities include:

1. Provide time-limited direct assistance to a beneficiary in the development of a comprehensive, long-term benefits management plan to guide the effective monitoring and management of Federal and State benefits and work incentives.

The completed report must include the following:

- Letter to beneficiary describing reason for referral, questions to be answered, brief summary of analysis outcomes, BPAO and PABBS contact information, and time and location of debriefing meeting with beneficiary and local support team
- Detailed Benefit/Financial Analysis that describes all benefits and how they might be impacted by earned income from employment (pre- and post-employment)
- Description of all work incentive programs available and suggestions on how to utilize them
- Related steps or activities necessary to achieve desired employment outcomes
- Associated dates or time frames
- Copies of all releases, and information gathered for completing analysis and recommending strategies and options

- Written summary of debriefing meeting and resulting plan, including beneficiary and local team responsibilities in implementing and maintaining strategies to assist with benefits management and employment
 - A copy of the Benefit Planning Check list will be provided in each plan and reported to CHD when submitting for payment.
2. Provide time-limited, intensive assistance to beneficiaries, their key stakeholders, and their support teams in making informed choices and establishing both employment-related goals as well as needed benefits management supports. Examples of needed benefits assistance may include:
 - How SSDI and SSI work incentives programs may lead to self-supporting employment by developing a PASS Plan
 - Developing a PASS Plan which can be used to obtain training, education, and entrepreneurial opportunities
 - How Impairment Related Work Expenses might be used to address some of the barriers to employment, such as obtaining a car for transportation needs
 - The 1619(b) provisions and requirements
 - What the Trial Work Period is and how it applies
 - What state funded benefits are available, and how would they be affected by employment income (Housing, ATAP, various Medicaid options including buy-in)
 - Strategies for benefits management to avoid overpayment status, etc.
 3. Provide time-limited follow-up assistance, consultation and advocacy as needed to beneficiaries and their teams who have previously received benefits planning and/or other types of benefits assistance services.
 4. Assist beneficiaries as needed to update benefits management plan.
 5. Provide information, referral, and problem-solving support.
 6. Provide information and consultation as needed to recipients and their support teams to assure ongoing, comprehensive, benefits monitoring and management assistance is provided for those who are likely to experience employment, benefits, or other changes that may dramatically affect their benefit(s) status, health care, or overall financial well being.
 7. Complete the following requirements in addition to providing the direct services described herein:
 - a. Attend and successfully complete all training required by SSA including 5 day BPAO training January 27-31, 2003, one week follow up training to be scheduled in April 2003, and successfully complete required field assignment with RCEP 7 regional training center by May 1, 2003.
 - b. If not currently enrolled and certified as a Benefits Planning Specialist Vendor with DVR, must successfully complete the benefits specialist certification process required by DVR within 9 months.
 - c. Participate in monthly Project (audio-conference).
 - d. Submit copies of all reports, plans and data tracking forms provided by CHD to document activities and beneficiaries served at least monthly.
 8. Coordinate activities with Alaska Works Regional Resource Specialists and Workforce Development Specialist.

9. Assure that all services provided for the BPAO Project are in compliance with all applicable state and federal laws and regulations.

Documentation

- Documentation of Benefits Planning and Assistance Services is to be mailed to Ken Hamrick using the following address:
Alaska Works WINS BPAO Project
Center for Human Development
2210 Arca Drive
Anchorage, AK 99508
- Documentation will be used to report progress of the Alaska WINS Project and Alaska Works Initiative.

Invoices & Payment

- All invoices must be originals and include the beneficiary name, initials or other identifier (e.g., SS#).
- All invoices should reference the Purchase Order #.
- Invoices are to be mailed to: Ken Hamrick, BPAO Project Coordinator
Center for Human Development
2210 Arca Drive
Anchorage, AK 99508
- Payment for services will be based on an individually negotiated hourly rate, or current established DVR vendor rate, and not to exceed 10 hours per beneficiary without prior written consent.

(See attached BPAO Process Outline for specific job scope, quality assurance and documentation requirements.)

Conditions for Participating in SSA required BPAO Training:

- Alaska Works WINS BPAO project agrees to make SSA required training and materials available for those who agree to provide Benefit Analysis and Planning services for the project at no charge. A two part training regimen will be provided in Anchorage, Alaska by the University of Missouri RCEP 7 and the Alaska Works Initiative in January and April 2003.
- Any individual Benefit Specialist who completes the training and agrees to provide BPAO services as described and subsequently declines to accept referrals or complete work on accepted referrals will be expected to reimburse the University of Alaska, Center for Human Development for the cost of training and materials (\$500.00) that have been provided.
- A \$500.00 materials and registration fee will be assessed to any participant(s) who attend the training but decline to provide services for the BPAO project.

Each Benefit Specialist will receive a Professional Service Contract with UAA/CHD upon successful completion of all required training activities described in 7, parts a & b above.

The Project Coordinator will make referrals to available regional Benefit Specialist on an as needed basis. UAA/CHD cannot assure individual Benefit Specialists a prescribed number of referrals. Referrals within a given region will be sequentially alternated amongst Benefit Specialists when more than one Specialist is available or upon beneficiary choice.

The Benefits Specialist for this agreement is:

Printed Name

Signature

Date