TANF/SSI Disability Transition Project (TSDTP): Pilot Findings

Presented at the
2013 NAWRS Workshop
August 20, 2013
Questions that emerged from Phase 1

• Are there effective ways to identify disabilities among TANF recipients and direct them to programs that will best serve them?

• How can SSA coordinate with TANF to ensure that eligible recipients are assisted with the application process?

• For TANF recipients who are not eligible for or not interested in SSI, are there promising strategies to help them become self-sufficient?
Three Pilots

• Muskegon County, MI
  - Goal: Improve and expedite the state’s TANF disability determination process; increase engagement in work for those deemed “work-ready with limitations”

• Los Angeles County, CA
  - Goal: Improve SSI advocacy program

• Ramsey County, MN:
  - Goal: Facilitate and encourage work among TANF recipients with disabilities
Muskegon County Pilot

- Tested use of SSI/SSDI Outreach, Access, and Recovery (SOAR) model
  - Pilot staff helped participants claiming disability complete packet
- Staff uploaded SOAR materials, medical documentation, and Medicaid utilization report to secure website that Medical Review Team (MRT) accessed
- MRT deemed cases: “work-ready with limitations,” “disabled and potentially eligible for SSI or SSDI,” or “not disabled”
- Based on determination, pilot staff referred participants to: Goodwill for individualized employment supports, SSI, or regular welfare-to-work program
- Staff trained in motivational interviewing
Results from Muskegon Pilot

• About half of the participants referred to the pilot made it through to the disability determination step
  - For others, medical documentation not submitted in time or participants did not submit SOAR packet

• Among determinations, most had disability or work limitation
  - 63% were “work-ready with limitations,” 27% were “potentially eligible for SSI/SSDI,” and 10% were “not disabled

• While pilot attempted to expedite process, collecting medical documentation took much longer than projected

• Due to slow determination (avg = 105 days), few participants received Goodwill employment services during 6-month pilot

• The SOAR model received mixed reviews from staff
Los Angeles County Pilot

• LADPSS, SSA, and DDS established clear lines of communication and authority for working with TANF participants

• SSA and DDS provided training to SSI advocates to improve applications
  - Provided feedback on applications submitted and rated quality on several factors: function reports, work history reports, medical records, and coordination

• SSI advocacy manager conducted presentations to TANF staff on SSI advocacy program and developed flyer to increase awareness
Results from LA Pilot

• Improved communication and coordination between LADPSS, SSA and DDS.

• Advocates assisted most TANF clients referred to the advocates who wanted assistance with their SSI application
  – Advocates contacted roughly 70% of individuals referred

• The overall quality of the applications submitted during the pilot was satisfactory but did not improve substantially

• Most SSI applications submitted with the advocates' assistance during the pilot period were denied at initial level (86%); similar to pre-pilot rate (89%)
Outcomes of Cases Referred to Advocates

- 14% of SSI applications awarded benefits at initial level
- Applied for SSI with advocate assistance: 20%
- Applied for SSI without assistance: 19%
- Other: 24%
- Refused advocacy services or did not cooperate: 15%
- Disability non-severe: 10%
- Working: 2%
- Technically ineligible: 10%
Ramsey County Pilot: Families Achieving Success Today (FAST)

- Integrated and co-located employment, mental health, and physical health services; focus on whole family, not just adult recipient
- Team from four organizations met weekly to review cases; staff conducted joint meetings with families
- Central to FAST: Individual Placement and Support (IPS) supported employment (SE) model
- Staff trained in motivational interviewing
- Evaluated pilot using random assignment design
  - Small sample (241 treatment cases; 148 control cases)
  - Control group required to participate in activities, but not necessarily meet federal work participation requirements
Individual Placement and Support (IPS) Supported Employment

• Developed to help individuals with severe mental illness achieve steady employment in *mainstream*, competitive jobs
  - Found effective in numerous RCTs
  - Now being tested with other populations

• Eight Core Principles
  - Focus on competitive employment
  - Eligibility based on client choice
  - Integration of rehabilitation and mental health services
  - Attention to client preferences
  - Personalized benefits counseling
  - Rapid job search
  - Systematic job development
  - Time-unlimited and individualized support
Results from Ramsey County Pilot

- Only 63% of treatment group enrolled in FAST

- Participation levels for both the FAST and control groups were high
  - The FAST group was more likely to participate in job search and the control group was more likely to participate in education or training activities

- Despite challenges of implementing IPS within TANF setting, FAST received score of “fair” from IPS fidelity review which was considered good for an initial review
### TANF and Employment Outcomes

<table>
<thead>
<tr>
<th></th>
<th>FAST Group</th>
<th>Control Group</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Received TANF (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quarter 1</td>
<td>81.4</td>
<td>88.1</td>
<td>-6.8 *</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>75.4</td>
<td>83.9</td>
<td>-8.5 *</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>70.3</td>
<td>72.0</td>
<td>-1.7</td>
</tr>
<tr>
<td>Quarter 4</td>
<td>61.9</td>
<td>65.0</td>
<td>-3.2</td>
</tr>
<tr>
<td><strong>Average TANF payments in Year 1 ($)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quarter 1</td>
<td>1,178</td>
<td>1,134</td>
<td>44</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>1,079</td>
<td>1,021</td>
<td>58</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>993</td>
<td>895</td>
<td>99</td>
</tr>
<tr>
<td>Quarter 4</td>
<td>823</td>
<td>728</td>
<td>95</td>
</tr>
<tr>
<td>Year 1</td>
<td>4,074</td>
<td>3,778</td>
<td>296</td>
</tr>
<tr>
<td><strong>Ever Employed (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quarter 1</td>
<td>23.3</td>
<td>16.7</td>
<td>6.6 **</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>24.8</td>
<td>19.8</td>
<td>4.9</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>31.7</td>
<td>21.4</td>
<td>10.2 **</td>
</tr>
<tr>
<td>Quarter 4</td>
<td>30.0</td>
<td>23.5</td>
<td>6.5</td>
</tr>
</tbody>
</table>
Lessons and Implications for Further Research
Lessons

• From Muskegon pilot, gathering medical documentation and using SOAR model took considerable time during pilot period
  - Are there quicker ways to assess disability?

• Findings from LA Pilot suggest that the SSI application process is complex; advocates can provide varying degrees and types of services within TANF
  - Are there components that are critical to operating an effective program?
  - Are there ways to engage participants after the first meeting to follow-up with requests from SSA?

• FAST pilot suggests this initiative, and IPS model, is promising and should be studied further with TANF population
  - Can this be replicated in other sites with larger samples?
Questions?

John Martinez
MDRC
212-340-8690
john.martinez@mdrc.org

Mary Farrell
MEF Associates
703-838-2723
mary.farrell@mefassociates.com