



**Employment Support Institute
School of Business
Virginia Commonwealth University**

Contact: MLHill@vcu.edu

Phone: 804-278-0152

Contact: jltroxel@vcu.edu

Phone: 410-544-7193 or 443-223-7060 (cell)

Website: <http://www.workworld.org/>

Using WorkWORLD™ to Achieve Employment, Housing, and Self-Determination Outcomes for People with Disabilities

Options for State Agencies and Other Organizations to Sustain ESI's WorkWORLD Software and Training and Consultation Services

Spring 2005

Sustain ESI's WorkWORLD Initiative

Because funding support from the Social Security Administration (SSA) to update, deliver, and maintain the federal components of WorkWORLD ended March 29, 2005, FREE access to new versions of WorkWORLD software, including maintenance and updates to the WorkWORLD Help/Information System, WILL NO LONGER BE POSSIBLE. Version 5.38 will remain available for free download until version 6.0 is released; the release date for version 6.0 is expected to occur on or before May 1, 2005. (If you are not very familiar with WorkWORLD, be sure to read the "[Background](#)" section below.)

It is time for others to step up to help us keep WorkWORLD services available for people with disabilities.

In order for people with disabilities, their families, and the multiple federal, state, and community-based agencies that serve them to access updated versions of WorkWORLD software and its Help/Information system, it will be necessary for individual states to provide professional fees to cover maintenance, updating and delivery of the software for 15 hours per month at \$90 per hour, \$16,200 annually. This may be accomplished by identifying a single state agency sponsor, or a group of agencies, to support the costs of making WorkWORLD available to users in the state. ESI needs about twenty (20) such state agreements to replace SSA funding support. Residents of states that have agreements with ESI will be able to request free delivery of each updated version.

In order to promote the continuing improvement of WorkWORLD software and services, ESI also encourages states to establish agreements to [customize](#) WorkWORLD with state-specific enhancements. States may choose to customize the software with their own comprehensive state Benefits Information System [see a sample MOU template at <http://www.workworld.org/mou/MOUTemplateCustomHelpSystem.doc>] or customize the software with questions, calculations, and text outputs for a particular state program [see a sample MOU template at <http://www.workworld.org/mou/MOUTemplateCustomCalculations.doc>]. Residents in states with either arrangement will be provided with free delivery of WorkWORLD and its Help/Information System.

Residents of states that have not established statewide agreements will have access to WorkWORLD and its Help/Information System by paying individual user-fees each time new versions are completed. Currently, these fees are \$50 for the complete program (which includes the Help/Information System) and \$25 for the Help/Information System alone. There are normally three or four version updates of WorkWORLD per year. The exact number of updated versions released in a specific year is dependent on the release timing and availability of new and updated policy information and benefit rates by the various federal agencies.

What state agencies should participate?

A variety of agencies that serve people who can benefit from WorkWORLD will want to participate. Many agencies/organizations benefit financially while serving their constituents more efficiently and effectively by having WorkWORLD available in their state. Potential contributors to a state agreement to help fund WorkWORLD include departments, divisions, or offices that provide:

- Vocational Rehabilitation Services;
- Services for the Blind and Visually Impaired;
- Centers for Independent Living Services;
- Education and Transition Services;
- State Centers or Institutes for the expansion of innovative assistive technology;
- Mental Health, Mental Retardation, and Substance Abuse Services;
- Developmental Disabilities Planning Councils;
- Social Services;
- Medical Assistance Services;
- Aging Services;
- Department of Labor and their One-Stop Workforce Investment Center Services; and
- Other agencies that benefit from helping people becoming more self-sufficient.

State legislators may also see the value of WorkWORLD for multiple agencies and want to support funding of WorkWORLD in their state for all citizens, agencies, and organizations.

What will your share of funding provide?

Your support will help ESI maintain, update and distribute the WorkWORLD software and its Help/Information System. This includes both tasks to ensure that program and policy content is complete and accurate, and technical tasks to ensure that the system functions correctly and incorporates helpful suggestions from users for improving functionality and usability.

WorkWORLD software and its Help/Information system will be distributed on CD-Rom through the postal service until sufficient support is achieved to make its availability on the web possible again.

Please contact Mark L. Hill, Director, Employment Support Institute, Virginia Commonwealth University, School of Business, P.O. Box 844000, Richmond, VA 23284, 804-278-0152, MLHill@vcu.edu or Jim Troxell, ESI Network Developer/Coordinator, 410-544-7193 or 443-223-7060 (cell), jltroxel@vcu.edu to discuss efforts in your state to establish a Memorandum of Understanding (MOU) to gain access for your state's citizens to WorkWORLD updates throughout the year. **Visit our website (www.workworld.org) for up-to-date details on our efforts to keep WorkWORLD available to users in your state.**

Background

WorkWORLD is an innovative software program designed to help people with disabilities who are receiving SSI, SSDI, and other disability benefits find employment-based paths to higher net income through the best use of work incentives. WorkWORLD takes into account the complex interaction of earnings, benefit programs, and work incentives to provide individualized recommendations for safe options and alerts to possible problems. It calculates the effects on net income and Medicaid eligibility of trying different paths to independence, and provides Text, Numeric, and Graphic results.

WorkWORLD software includes a comprehensive Help/Information System, an electronic encyclopedia of disability policy and program information targeted to people who are receiving SSI, SSDI, Section 8 Housing, and Food Stamps benefits, among many other federal and state programs that affect people with disabilities. (Go to <http://www.workworld.org/wwwwebhelp/basic.htm> to see the current Help/Information System.)

WorkWORLD software has been developed through funding from federal and state contracts and grants since 1996. From September 1999 through March 2005, a contract from the Social Security Administration (and smaller agreements from several states) has supported maintenance and enhancement of the WorkWORLD program and its benefit-information system. SSA has contributed to establishing WorkWORLD as a unique individualized employment-policy decision and choice support system for people with disabilities. These funds made it possible for ESI to provide everyone with **FREE** access to WorkWORLD software and WorkWORLD resources on the Web through March 29, 2005.

Our success is demonstrated by the 300,000 visitors (with unique Internet addresses) who use the WorkWORLD website and view more than four million of its web pages per year; over 3,800 people currently are on the WorkWORLD mailing list to receive notices about version updates of WorkWORLD software and other related news; and the full WorkWORLD program is downloaded more than 300 times each month (figures are based on March 2005 analysis).

Moving Forward with an Agreement to Customize WorkWORLD for Your State

In addition to the numerous policies that apply across the country there are also complex policies that are implemented at a state level. One policy area that has garnered the most interest is the variety of Medicaid programs that have state-specific rules concerning eligibility, spend-downs, and buy-ins. Virginia, Massachusetts, and Delaware increased WorkWORLD's scope by establishing agreements to deal with these state-specific features. Other states -- notably South Dakota, Oklahoma, South Carolina, Georgia, and Iowa -- have commissioned ESI to customize WorkWORLD with other state-specific program and policy content for the Help system.

To customize WorkWORLD for individual states, a Memorandum of Understanding (MOU) is established between a sponsoring state agency, a community-based organization, or a collaborative of agencies, and ESI. The MOU establishes the number of professional fee hours needed to make the software more comprehensive, more functional, and most responsive to individual state initiatives.

State customizing for WorkWORLD is accomplished through two or more phases of development, with options for states to elect within those phases.

Phase 1 options include:

Option 1-- Development and integration of a comprehensive State Benefit Information System (BIS) into the core WorkWORLD Help System. The state BIS makes the software a more comprehensive resource by providing authoritative policy information, such as eligibility standards for specific programs and groups, and reliable details about the administrative procedures followed by a variety of state agencies. A typical BIS includes more than 140 topics, over 1,300 hyperlinks among the various topics, over 500 index cross-references, and Internet links to original source materials (whenever possible) so that users can get more details online. ESI staff members collaborate directly with state personnel during the development of the BIS to prioritize, gather, and verify information for the system.

After the BIS has been drafted, and before it is integrated into WorkWORLD's Help/Information System, state personnel work with ESI to review the content and functionality of the system and to identify changes that may be required prior to integrating the BIS into the software. In addition, state leaders and ESI staff discuss practical plans for statewide implementation of WorkWORLD for benefits analysis and employment planning.

Cost: Standard cost for Phase 1, Option 1 is \$70,000

Option 2--Development and integration of extensive information and calculated Numerical and/or Text results for one type of state benefit assistance deemed by the state to be of greatest importance. In this option, the state picks one type of benefit program (such as Virginia's choice of Medical Assistance) as the focus of state customization for WorkWORLD.

Under this option, ESI incorporates extensive information about different covered groups of the program, their eligibility requirements, services covered, and rules for determining assistance

units into the WorkWORLD Help System. In addition, questions, calculations, and calculated results showing the effects of changes in earnings, unearned income, resources, and the use of work incentives on the costs and benefits of the various programs are provided for the specified state benefit program. For example, for Virginia users WorkWORLD will calculate the effects of shifting from a Medicaid program that does not require a spend-down to one that does, based on the financial circumstances and size of the assistance unit.

One on-site meeting with state leadership and ESI staff is recommended in conjunction with this customizing effort. Typically, this meeting will take place after significant progress has been made and before policy information and calculations are integrated into WorkWORLD. This provides the opportunity to review the content and functionality of the system and to identify changes that may be required prior to integrating state-customized features into the software. In addition, state leaders and ESI staff will discuss practical plans for statewide implementation of WorkWORLD for benefits analysis and employment planning.

Cost: The cost for Phase 1, Option 2 state customization does not vary significantly because the scope and depth of the state programs selected for integration into WorkWORLD tend to be quite similar. The standard cost for Phase 1, Option 2 is \$80,000, including professional fees for the on-site review and planning meeting (direct travel expenses to be paid by the sponsoring state).

Phase 2 developments enhance the usefulness of WorkWORLD to an even greater extent. Phase 2 may consist of the addition of either Option 1 or 2 above to the work included in Phase 1. If a state has completed Option 1 (by having a comprehensive state BIS information integrated in the WorkWORLD Help/Information system), then it can move to Option 2 and include in-depth information and calculated results for an assistance area deemed most important. For example, the Massachusetts BIS includes comprehensive information about most benefit programs affecting people with disabilities, complemented by extensive information and calculations concerning its state Medical Assistance programs.

Alternatively, a state that has chosen Option 2 in Phase 1, might then choose either to develop a comprehensive BIS to cover all relevant state programs and policies (Option 1), or to add in-depth information and calculations for a second priority program (Temporary Assistance to Needy Families, for example).

Cost: The standard cost for Option 2 is \$80,000.

ESI's Training and Consultation Services

WorkWORLD Training Options

ESI provides training programs and interactive exploration of WorkWORLD both at Virginia Commonwealth University's School of Business and at any location in the country where a sponsoring state agency or community organization brings a training group together.

All programs include hands-on computer training in the use of WorkWORLD for:

- Calculating the effects of using work incentives and going to work on SSI, SSDI, Medicaid and Medicare
- Using WorkWORLD as a tool for exploring benefit options
- Using WorkWORLD as a benefits planning and communication tool
- Using the WorkWORLD Help/Information System to find the rules governing other benefits such as Section 8 Rental Assistance, Food Stamps, and other public disability benefits.

Training programs also help groups explore ways to use WorkWORLD for specific priorities and areas of interest, such as:

- Transition from school to work
- Advance planning for the effects of significant life changes on benefits eligibility (turn ages 18 and 22; marriage; changes to living situation, etc.)
- How to use WorkWORLD for both short-term decision-making and for long-term comprehensive planning
- How to use WorkWORLD to help individuals and Employment Networks achieve Ticket to Work outcomes

VCU Training: Classes at VCU will be scheduled whenever a minimum of 8 people pre-register for training. We will schedule the program date at a time convenient for pre-registrants, and then open the program to others with a program announcement at the WorkWORLD website. **Cost:** \$175 per participant.

On-Site Training: WorkWORLD on-site training may be arranged for up to twenty (20) participants. The site should be equipped with a projection screen and at least one computer for every two participants. [The most current version of WorkWORLD must be installed on the training computers in advance of the program]. **Cost:** Professional fee and training materials (\$1,800) plus travel time (\$500): \$2,300, plus direct costs of travel (airfare, mileage, etc.).

ESI's Consultation Services

There are many ways that WorkWORLD users can achieve agency and individual outcomes, and numerous educational and policy improvement applications for the software. ESI can consult with individual agencies and coalitions to help them use WorkWORLD to illustrate ways to help achieve particular outcomes.

For example, some state Vocational Rehabilitation agencies are recognizing that WorkWORLD can help them increase reimbursements from SSA for assisting beneficiaries to earn more than Substantial Gainful Activity (SGA) for a continuous period of 9 months, bringing in important non-match federal revenues to the state.

Some state leaders have discovered that WorkWORLD can be used to evaluate demonstration programs, like the Medicaid Buy In and 1619b use. WorkWORLD can be used to establish a

baseline for persons coming into an agency for the first time or for a baseline of where the person started before receiving services. WorkWORLD can help people evaluate the outcomes of their services, programs, and research questions by tracking a person's policy situation across time.

Content development for targeted program and policy areas in the WorkWORLD Help system may also be of interest to particular constituencies. For example, WorkWORLD has the capacity to include in-depth information about safe paths to self-employment possibilities, successful school-to-work transition planning, among other areas of interest.

ESI is available to consult with advocacy organizations, community-based providers, school personnel, center for independent living, parent groups, and other groups to identify ways to make WorkWORLD useful, both through software development initiatives, as well as special projects focused on using the software to improve specified processes and outcomes.

Other consultation services include:

- Policy analysis
- Training curriculum development
- Targeted case scenario development to demonstrate specific options, opportunities or problems

Cost: **ESI's professional fee for consultation services for new customers (without travel) is \$90.00 per hour.** ESI's professional fee rate will increase each January, rounded to the nearest dollar, based on the CPI average increase for all items for the previous year (example, 3% increase from Jan 04 to Jan 05). The CPI index can be found at <http://www.bls.gov/cpi/>