

**Addendum to the Supporting Statement for  
Work Incentives Planning and Assistance (WIPA) Projects  
CFR Citation  
OMB No. 0960-0629**

**Justification for Non-Substantive Changes**

*Background*

In September 2007, SSA added the Work Incentive Planning and Assistance (WIPA) Program data collection to the Evaluation of the Ticket to Work Program. SSA added the WIPA data collection to provide information for the evaluation of the WIPA Program and to provide ongoing management information for SSA and the WIPA project staff. Subsequent to the most recent clearance approval in September 2010, there have been two changes in SSA's procedures and research necessitating changes in the cleared forms (i.e., screens) to meet the requirements of the Work Incentive Information and Referral Center (WIIRC) and the Benefit Offset National Demonstration (BOND).

*WIIRC*

In late 2009, SSA introduced the Work Incentive Information and Referral Center (WIIRC). The WIIRC provides information and referral services, and then refers beneficiaries who need additional WIPA services to a WIPA provider in the beneficiary's local area. The introduction of the WIIRC shifted the information and referral service from the WIPAs to the WIIRC. Originally, the WIIRC provided information and referrals only for calls made to the Ticket to Work Call Center for beneficiaries who requested information on how work affects benefits. In September 2010, SSA awarded a new contract to expand the role of the WIIRC, which substantially increased the amount of information and referrals the WIIRC handles. The introduction of the WIIRC required modifications of the existing ETO (software) screens to 1) limit the data input screens to include only intake and referral elements, and 2) to add the elements necessary for the new referral process.

*BOND*

The pilot test of the Benefit Offset National Demonstration, mandated by Congress, will begin in January (0960-New, pending OMB approval). As part of the demonstration, the participating beneficiaries will have very different rules as compared to non-participating (almost all other) beneficiaries for how employment affects benefits. In the BOND demonstration, SSA will test a policy change that allows beneficiaries to receive a \$1 reduction in benefits for every \$2 in earnings over Substantial Gainful Activity (SGA) levels; eliminating the abrupt loss of cash benefits in the Social Security Disability Insurance program when a beneficiary works and has earnings over a specific amount. We combine the gradual change in the benefit amount with benefits counseling with the goal of helping beneficiaries with disabilities return to work. Participating beneficiaries will require BOND-specific information and referral services. The WIPAs and the WIIRC, who provide referrals and information on benefits and work for SSA beneficiaries, will need to know if a beneficiary is participating in BOND to ensure they will give the correct information and referral. SSA plans to modify the ETO screens to show different kinds of alerts notifying the WIPAs and the WIIRC that a beneficiary is a participant in BOND and providing BOND-specific instructions and referrals. This will prevent the WIPA

from providing incorrect advice and will instruct WIPAs to make the correct referral, where appropriate. The changes to the screens consist of a variety of alerts, such as pop-ups and alert boxes.

In designing the system to provide the alerts, we recently learned that we are not able to automate completely the transfer of information of the identity of BOND participants from the BOND data system to ETO while meeting SSA's and OMB's confidentiality and security requirements. As a result, the changes to ETO will allow the BOND contractor (Abt Associates) to enter limited identifying information directly for some BOND participants into ETO. The data the contractor will enter includes: 1) the demographic information the WIPA would have entered; 2) the BOND treatment group information; and, 3) three additional BOND variables: enrolled in BOND, the BOND treatment group, and BOND identifier, for an estimated 7,800 beneficiaries.

### **Summary of the Non-Substantive Changes**

#### *Summary of the Changes for WIIRC*

We have made the following changes to accommodate the shift from the WIPAs making the Intake & Referrals to the WIIRC. The WIIRC has one new screen for making referrals to the WIPAs. There is one new screen for the WIPAs to accept or reject the referral. The attached document shows the new screens and changes outlined in red.



WIIRC changes.docx

#### *Summary of the Changes for BOND*

We will add different types of alerts and instructions in several places in ETO to alert the WIIRC and WIPAs that a beneficiary is a participant in BOND. Examples of the changes to existing screens are shown in the attached document and changes are highlighted in red.



BOND changes.docx

#### *Word Substitution*

We have substituted the word "suggested" to replace "recommended" in three response categories in the Efforts screen and the changes are outlined in red.



Word change.doc