**BEYOND BENEFITS STUDY**
**SOCIAL SECURITY ADMINISTRATION**

Thank you for agreeing to participate in this focus group. My name is [NAME] [if have someone else there, introduce them as well]. [I/we] work for Westat, a research organization based in Rockville Maryland. The Social Security Administration, or SSA, has hired Westat to conduct the Beyond Benefits Study.

During the Beyond Benefits Study, researchers will collect information about the service, medical, and employment needs of working-age adults who used to get disability-related payment from SSA in the past, but who stopped receiving disability-related payments due to medical improvement (Exiters). We are also collecting the same information from beneficiaries who are scheduled for or going through a continuing disability review (CDR) that will determine whether their impairment is less severe and no longer qualifies for disability payments (Possible Exiters). The study includes a pilot examining the feasibility of using motivational interviewing with this population. This study will help SSA identify potential interventions and inform policy recommendations to help people who are leaving disability benefit programs and may be considering going back to work.

Today, we'd like to have a conversation about your experiences serving individuals who receive or have received disability-related payments.

We previously sent you an informed consent sheet, explaining your rights in participating in this study. Did you have any questions about that information? [ANSWER QUESTIONS]

I just want to remind you of some of the key points about your rights. This is a research project. Your participation in this interview is voluntary. Your answers are for research purposes only, to evaluate the study.

A study member will lead the focus group and will instruct all participants that everything discussed in the focus group should be kept private. However, there is some chance that some focus group members might share what they hear in the focus group with others outside the group.

You can stop participating in the focus group at any time without penalty. You can choose not to answer one or more of the questions. If you decide not to participate in the focus group, there will be no penalty and your decision has no impact on any decision SSA makes about your current or future disability benefits or payments.

We will use the information from this focus group, along with information gathered during the pilot, to determine whether Motivational Interviewing is beneficial if offered to Exiters and Possible Exiters and whether it should be a part of a larger SSA intervention. We may use quotes from you or other participants but no names will be linked to any responses.

We have planned for this focus group to last no longer than an hour and a half. You will receive a $40 Visa gift card by mail to thank you for your participation.

Do you have any questions? [ANSWER ALL QUESTIONS]

Finally, with your permission, I would like to record this focus group to help [me/us] recall what was said.
Are you okay with me recording? [PAUSE FOR RESPONSE]

[IF AGREES TO RECORDING]
I'd like to start the recording now. [TURN ON THE RECORDER.]
For purposes of the recording, I am going to ask you:
Are you willing to participate in the focus group? Are you willing to have the focus group recorded?
[PAUSE FOR RESPONSE.]

[IF DECLINES RECORDING]
Unfortunately, this means that you cannot participate in the focus group. Thank you for your interest.
 [PAUSE FOR RESPONSE.]

OK let's begin.

## I.      Introduction

To start, I'd like to review the guidelines for this focus group and also facilitate some introductions.

As I previously mentioned, my name is [NAME] and I work for Westat, a research company. I'm joined by [NAME] who will act as a tech liaison during the focus group, We are gathering information for the Social Security Administration about using motivational interviewing to help motivate people with disabilities to become independent.

We want everyone to feel comfortable sharing their experiences with us in this group. As part of that, I want to emphasize that everything that is said during this focus group should be kept private. That means that while you can talk to people outside this group about the focus group in general terms, no one should be talking specifically about what was said. For example, you can tell people that you participated in a focus group about serving people with disabilities, but don't tell people that "so-and-so said this or that." We won't be using any last names, and we've encouraged people to use pseudonyms or nicknames if that makes them more comfortable. If anyone has any concerns about their privacy, please let me know.

All right. Let's start with some introductions. If we could go around, I'd like to ask everyone what name they'd like to be called and a little bit about your work and how it connects with individuals with disabilities. I'd also like to hear how long you have been doing this work, and whether you've provided services remotely. Let's start with [NAME]

[NOTE: AFTER INTRODUCTIONS, CAN GUIDE THE DISCUSSION TO ANY OF THE TOPICS BELOW, BUT DOES NOT HAVE TO BE IN ORDER]

[FOR ALL QUESTIONS, PROBE WHETHER OTHERS IN GROUP HAVE HAD SIMILAR OR DIFFERENT EXPERIENCES/WHETHER THEY AGREE OR DISAGREE]

## II.     General experience working with Exiters or possible Exiters

I'd like to talk about your experience working with people who are currently pursuing employment and receiving disability-related payments or who received disability payments in the past.

1.  What are some of the more common characteristics of job seekers you see? How is it different for people who are currently pursuing employment and receiving disability-related payments or who received disability payments in the past? How does it differ between people receiving SSI versus those receiving SSDI?

Probe: Age? Gender? Race/ethnicity? Type of impairment? Years on disability?

2.  What are some of the key strengths of people who are currently pursuing employment and receiving disability-related payments or who received disability payments in the past, in your experience? Is this different for Exiters and Possible Exiters? Is this different for those receiving SSI versus those receiving SSDI? What characteristics in this population do you see leading to success?

3.  What are some of the key employment challenges faced by people who are currently pursuing employment and receiving disability-related payments or who received disability

payments in the past? Do Exiters and Possible Exiters face different key challenges? Do those on SSI face different challenges than those on SSDI?

4. Do you find that people receiving disability-related payments or exiting disability have distinct needs, different from other populations you serve?

### III.  Services provided and outcomes

I want to talk more specifically about the services you provide to people who are currently pursuing employment and receiving disability-related payments or who received disability payments in the past.

5. What types of services have you provided for Exiters and Possible Exiters?
    a. Probe: Job search assistance, retraining, soft skill training, other
    b. Have you provided these services by phone? By virtual conference? In person?

6. In your experience, what types of services work best for Exiters and Possible Exiters? Do these services vary for those receiving SSI versus those receiving SSDI? Can you share lessons learned for what works best for Exiters and Possible Exiters?

[For each type of service provided to Exiters and Possible Exiters]
7. What types of outcomes have you seen with Exiters and Possible Exiters?
    a. Have you seen an increase in the likelihood of exiting with this service?
    b. Are these outcomes different than you have seen with other populations?
    c. Have these outcomes changed over time?
    d. What characteristics do successful Exiters and Possible Exiters share?
    e. What challenges do unsuccessful Exiters and Possible Exiters face?

8. Do outcomes for Exiters and Possible Exiters differ by whether the service is offered in person or by phone/virtually?

9. How effective do you think it is to offer these services through telephone or video conferencing for Exiters and Possible Exiters? Why is that?

    a. Probe: Would training help make these services more effective by phone or video conferencing?

10. What challenges have you experienced in offering these services through telephone or video conferencing for this population?

### IV.  Challenges and facilitators

Next, I want to talk about the challenges and facilitators you have faced in providing services, particularly to Exiters and Possible Exiters.

11. Thinking about staffing, have you faced any challenges in providing employment services to people receiving disability-related payments or who received disability payments in the past?
    a. Probe: Not enough staff; staff turnover; staff qualifications; access to work incentive counseling; other

    b. What has been the impact of these challenges?
        i. On staff?
        ii. On clients?
    c. Have you had any staffing challenges in providing other services specifically for Exiters and Possible Exiters?
    d. [if no challenges] How have you avoided staffing challenges? How have you recruited and retained capable staff?
    e. [if challenges] What would help ease staffing challenges? What changes would you like to make staffing easier/work better?

12. Thinking about funding, have you faced any challenges in providing employment services to people receiving disability-related payments or who received disability payments in the past?
    a. Probe: Not enough funding; inconsistent funding; other
    b. What has been the impact of these challenges?
        i. On staff?
        ii. On clients?
    c. Have you had any funding challenges in providing other services specifically for Exiters and Possible Exiters?
    d. [if no challenges] How have you avoided funding challenges?
    e. [if challenges] What would help ease funding challenges?

13. Have you had experience with the Ticket to Work program?
    a. If Yes: What has been your experience with the program?

14. Are you aware of the Partnership Plus program?
    a. If yes: What impact has Partnership Plus had on your work?
        i. How has Partnership Plus changed outcomes for the clients you serve?
        ii. How has Partnership Plus impacted the relationship between service providers in your state?
        iii. Are there any policy changes that would make it easier for your agency to work with employment networks, to better serve Exiters?

15. Thinking about policies, at the local, state, and federal level, do you think any policies have made it more difficult to provide employment services to people receiving disability-related payments or who received disability payments in the past?
    a. Probe: Regulations; requirements; etc.
    b. What has been the impact of these challenges?
        i. On staff?
        ii. On clients?
    c. Have you had any policy challenges in providing other services specifically to Exiters and Possible Exiters?
    d. Are there any policies or regulations that have made it easier to serve Exiters and Possible Exiters?
    e. What policies or regulations would you put in place to make it easier to serve Exiters and Possible Exiters?

16. What services could SSA provide while people are receiving benefits to keep them interested in returning to the workforce? (e.g., benefit counseling)

       a. Are there any services at the state level that could keep people interested in returning to the workforce?

## V.     Training and technical assistance needs

17. Do you feel the training you've received prepared you to provide services to Exiters and Possible Exiters? Why or why not?

18. What types of additional training or technical assistance do you think would help in providing services to Exiters and Possible Exiters? Probe: Employment services and other services

19. Have you received training or do you have experience providing these services on the phone or using an audio-video platform to provide services? If yes, what did this involve?

       a. If you have experience providing services remotely, what has your experience been like?
       b. Have you felt like you had enough support (from managers, colleagues, others) in providing services remotely?

20. What types of additional training would be helpful in providing services on the phone or by video conference?
       c. Would this be specific to helping Exiters and Possible Exiters?

21. If services to Exiters and Possible Exiters were increased, how would this impact your own work/practice?
       d. What concerns would you have about serving more Exiters and Possible Exiters?
           i. Probe: Work load, staffing, expertise/training, funding, other
       e. Are there additional employment services that you think it would be important to offer? If so, what would these be?
       f. Are there additional services, outside of those provided by your organization, that you think it would be important to have in place?
           i. E.g., medical, social services, housing, transportation, etc.
       g. What positive impacts would you expect to see from providing additional services to Exiters and Possible Exiters?

**22.** Any final comments?

**Thank you for your time.**