Assistive Technology:
Funding and Utilizing Technology For Bigger and Better Outcomes in Competitive Employment

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Assistant Executive Director

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Senior Project Manager

wise
www.gowise.org
Background: where Shaun is coming from
pbs, aba, and employment
Specialized supports

Specialized supports built into universal supports

Universal supports that are designed to help everyone
So many examples of what this looks like on our YouTube channel—more to come!

https://www.youtube.com/wisemovies
Specialized Technology: Bob Brookins in Bellevue Washington
Technology is being designed with us in mind, or at least it might as well be...
Universal Technology Offering Specialized Access: Meet Fantasy A of Seattle Washington
One to One technology: Meet Veronica Cook from Shoreline School District
Examples of universal tech: from the jobsite and the transition classroom

- Smart/contextual task lists and reminders
- Video modeling and marketing
- Scheduling and calendaring
- Wayfinding
Technology can supercharge the employment provider as well!

- Marketing
- Data analytics
- Time management: we don’t have computers?
getting handsy

our guy is using a "hand grabbing" to communicate something to us. Use this form every time you experience this communication from him so that we can get the information we need to translate this communication into something that we can more easily understand.

Who are you?
- john
- sally
- Other: [blank]

What happened right before the problem behavior?

What was the problem behavior?
- Grabbed hand
- Grabbed hand and pulled fingers
- Other: [blank]

What happened as a result of the problem behavior?

- Did he get to stop work? did you provide further instruction? What did you or anyone else in the environment do?

Submit
We have challenges in access... because we misunderstand the value of universal technology.
1. Build systems that are flexible and adaptive.

Everything will change right under you!
2. Focus on simplicity.

“We do life with people”
3. Create partnerships with people in service and those who create the technology.

The tech companies need us just like we need them.
ASSISTIVE TECHNOLOGY

Funding Technology
Someone on SSI with a job that pays $800/month gets exclusions from countable income

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Wages</td>
<td>$800.00</td>
</tr>
<tr>
<td>Apply General Exclusion</td>
<td>-$20.00</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>$780.00</strong></td>
</tr>
<tr>
<td>Apply Earned Income Exclusion</td>
<td>-$65.00</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>$715.00</strong></td>
</tr>
<tr>
<td>Apply ½ earned income exclusion</td>
<td>÷ 2</td>
</tr>
<tr>
<td><strong>Total Countable income</strong></td>
<td><strong>$357.50</strong></td>
</tr>
</tbody>
</table>

PASS Account:

- Monthly deposit: $357.50
- For 12 months: $4,290.00

Remaining SSI after countable income is applied:

- SSI Full Benefit Rate: $771.00
- Minus the countable income: -$357.50
- Adjusted SSI Amount: $771.00

Total income:

- Wages: $800.00
- Apply Pass Exclusion: -$357.50
- Remaining wage income: $442.50
- SSI amount: $771.00
- Total: $1,213.50

Countable income is the amount SSA subtracts from the benefit.
Using an IRWE when you are on SSI

A single person on SSI only receives a maximum of $771. With $300 IRWE, you can receive up to \( \frac{1}{2} \) of the amount back in increased SSI.

### Someone on SSI with a job that pays $800/month gets exclusions from countable income

<table>
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</tr>
<tr>
<td>Subtotal</td>
<td>$715.00</td>
</tr>
<tr>
<td>IRWE</td>
<td>$300.00</td>
</tr>
<tr>
<td>Apply ( \frac{1}{2} ) earned income exclusion</td>
<td>( \div 2 )</td>
</tr>
<tr>
<td><strong>Total Countable income</strong></td>
<td><strong>$207.50</strong></td>
</tr>
<tr>
<td>(VS 357.50 without IRWE)</td>
<td></td>
</tr>
</tbody>
</table>

### Remaining SSI after countable income is applied

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSI Full Benefit Rate</td>
<td>$771.00</td>
</tr>
<tr>
<td>Minus the countable income:</td>
<td>-$207.50</td>
</tr>
<tr>
<td><strong>Adjusted SSI Amount</strong></td>
<td><strong>$563.50</strong></td>
</tr>
</tbody>
</table>

### Total income

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wages:</td>
<td>$800.00</td>
</tr>
<tr>
<td>-$300.00</td>
<td></td>
</tr>
<tr>
<td>SSI amount:</td>
<td>+$563.50</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1,063.50</strong></td>
</tr>
</tbody>
</table>

*Remember payment of $300 IRWE is an expense*
## Comparison of Work Incentives

<table>
<thead>
<tr>
<th>Work Incentive</th>
<th>Income</th>
<th>-$20 GE</th>
<th>-$65 EIE</th>
<th>-$300 IRWE</th>
<th>-½ Exclusion</th>
<th>-PASS</th>
<th>Total Countable Income</th>
<th>Adjusted SSI Amount</th>
<th>Total Income</th>
<th>Other Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>$800</td>
<td>$780</td>
<td>$715</td>
<td>n/a</td>
<td>$357.50</td>
<td>n/a</td>
<td>$357.50</td>
<td>$413.50</td>
<td>$1,213.50</td>
<td>n/a</td>
</tr>
<tr>
<td>PASS set aside of countable income</td>
<td>$800</td>
<td>$780</td>
<td>$715</td>
<td>n/a</td>
<td>$357.50</td>
<td>$357.50</td>
<td>$0</td>
<td>$771.00</td>
<td>$1,213.50</td>
<td>PASS set aside of $357.50</td>
</tr>
<tr>
<td>IRWE of $300</td>
<td>$800</td>
<td>$780</td>
<td>$715</td>
<td>$415</td>
<td>$207.50</td>
<td>n/a</td>
<td>$207.50</td>
<td>$563.50</td>
<td>$1,363.50</td>
<td>IRWE cost of $300.00</td>
</tr>
</tbody>
</table>

### Abbreviations

- **GE:** General Exclusion
- **EIE:** Earned Income Exclusion
- **IRWE:** Impairment Related Work Expense
- **PASS:** Plan for Achieving Self Support
Requirements for PASS and IRWE

**PASS**

- Specific to Individual;
- Be in writing. Form **SSA-545-BK**;
- Have a specific work goal that meets capabilities;
- Have a specific **timeframe** for reaching goal;
- Income other than SSI and/or resources to be used to reach goal and show how they will be used;
- Money set aside will be kept separated;
- Approved by SSA; and
- Reviewed periodically by SSA

**IRWE**

- The item(s) or service(s) enables you to work;
  Needed because of a physical or mental impairment;
  Not reimbursed by another source such as Medicare, Medicaid, or a private insurance carrier; and
  The cost is “reasonable”
### ABLE Savings Accounts

#### Parameters

<table>
<thead>
<tr>
<th>Any expense related to living life with disabilities, including:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Education;</td>
</tr>
<tr>
<td>• Housing;</td>
</tr>
<tr>
<td>• Transportation;</td>
</tr>
<tr>
<td>• Employment training and support;</td>
</tr>
<tr>
<td>• <strong>Assistive technology:</strong></td>
</tr>
<tr>
<td>• Personal support services;</td>
</tr>
<tr>
<td>• Health care expenses;</td>
</tr>
<tr>
<td>• Financial management</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Onset of <strong>significant</strong> disability before turning 26 years of age.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• SSI eligibility; or</td>
</tr>
<tr>
<td>• SSDI eligibility; or</td>
</tr>
<tr>
<td>• Meet SSI criteria regarding significant functional limitations. (<strong>Signed diagnosis form by a licensed physician.</strong>)</td>
</tr>
</tbody>
</table>
ABLE Accounts: Savings Limits

**Annual**
- Total annual contributions: $15,000
- Working individuals: Additional $12,140 (2019 amount) unless they are contributing to a 401(k), 203(b) or 457 (b) plan.

**Total**
- First $100,000 exempted from resource limit for SSI and Medicaid.
- Over $100,000, the beneficiary would be suspended from SSI benefits, but would not effect Medicaid eligibility.

*Note: States would be able to recoup some expenses through Medicaid upon the death of the beneficiary.*
More ABLE Information

• Online information: www.ableforall.com

• If you don’t have an ABLE Program established in your state, there are other states which provide access to their ABLE program for out of state participants.
Assistive Technology Loans

There are about 35 Assistive Technology Loan “Centers” throughout the U.S.

- Offer competitive interest rates, options for technology which might not be approved/funded by other resources

WA Access Fund:

- Loans of up to $10,000; terms up to 5 years
- Anything needed to enhance functional capabilities and related services
- Money is disbursed directly to the vendor
- Can cover copays for Durable Medical Equipment
Individual Development Account (IDA)

IDAs offer:
• Financial literacy courses
• Matched dollars for savings
• Resource protection: dollars paid directly to vendor
• Options for technology which might not be approved/funded by other resources
• Financial education (required)

NW Access Fund:
• WA Resident with disability, or family member of such, at least age 18
• Meet income limits (80% of county median)
• Money is disbursed directly to the vendor for assistive technology with a 1:1 match
• Save at least 6 months, up to $2,000 match

https://prosperynow.org/map/idas
Services for the Blind/Vocational Rehabilitation

Allows for additional options in assistive technology, may be primarily focused on increasing functioning at work

- **Assessment**
  - Determine rehabilitation technology needs

- **Job Site and Training Site Analysis**
  - Includes testing and research

- **Rehabilitation Engineering Services**
  - For design and modification

- **Comprehensive Training**
  - Learning to use technology

- **Procurement, Installation and Follow-up**
  - Related to the assistive technology devices
Medicaid and Medicare Funded Assistive Technology

Equipment/DME

Equipment and appliances are items that are primarily and customarily used to serve a medical purpose, generally are not useful to an individual in the absence of a disability, illness or injury, can withstand repeated use, and can be reusable or removable.*

*Note: CMS has stated, “Medicaid coverage of equipment and appliances is not restricted to the items covered as durable medical equipment in the Medicare program, and States that limit their DME coverage to those items covered by Medicare can no longer do so.”
Optional Medicaid Coverage for Items/Services

<table>
<thead>
<tr>
<th>Prosthetic Devices:</th>
<th>Prescribed by a physician or other licensed practitioner of the healing arts . . . [which will] prevent or correct physical deformity or malfunction; or support a weak or deformed part of the body.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Therapy, Occupational Therapy, and Services:</td>
<td>Services of a licensed therapist and any necessary supplies and equipment.</td>
</tr>
<tr>
<td>Rehabilitative Services:</td>
<td>Medical or remedial services, recommended by a physician or other licensed practitioner of the healing arts . . . for maximum reduction of physical or mental disability and restoration of a recipient to his best functional level.</td>
</tr>
<tr>
<td>Home and Community-Based Waiver Services:</td>
<td>Environmental accessibility adaptations, adaptive aids, specialized medical equipment and supplies, and personal emergency response systems.</td>
</tr>
<tr>
<td>Community First Choice/1915(k):</td>
<td>May include assistive technology and skills acquisition training</td>
</tr>
</tbody>
</table>
“Primarily and customarily used to serve a medical purpose, generally not useful to an individual in the absence of a disability, illness or injury, can withstand repeated use, and can be reusable or removable.” Items that meet this definition cannot be limited to those provided in a Medicaid beneficiary’s home.

Specifically, the federal home health regulation now states that beneficiaries can receive home health services “in any setting in which normal life activities take place.”

The only exceptions are hospitals, nursing facilities, intermediate care facilities for individuals with intellectual disabilities, or any setting in which payment is or could be made under Medicaid for inpatient services that include room and board.

“States may not deny requests for items based on the grounds that they are for use outside of the home."
Learning More About Medicaid Funded Options

FUNDING ASSISTIVE TECHNOLOGY THROUGH STATE MEDICAID PROGRAMS

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