



# Your Amazing Journey, LLC

*Passion, Purpose, Abundance, Freedom*

Social Security Disability to Work Coaching, Counseling & Consulting

## Communication Policy | Social Security to Work (SSW)

Updated 8/28/2024

Updated sections:

I - Scheduling & Cancellations: No Call/No Show Policy, Late Arrival.

VII. Confidentiality: Constant Contact added.

### I. SCHEDULING & CANCELLATIONS

Please use the links to Acuity Scheduling for scheduling appointments and use your appointment confirmation emails from Acuity Scheduling for appointment changes and cancellations UP TO 24 HOURS BEFORE appointments.

**Cancellations UP TO 24 HOURS BEFORE appointments:** Use your appointment confirmation email to cancel or change your appointment. At the bottom of the email, select the Change/Cancel button. (Please keep your appointment confirmation emails in case you need to cancel or reschedule.) Please follow that up with an email or phone call to tell me why you canceled or changed your appointment. Text messaging is not acceptable for scheduling-related matters.

**Cancellations WITHIN 24 HOURS BEFORE appointments:** Cancellations within 24 hours before appointments cannot be made through Acuity Scheduling, and I will not accept cancellation notices during this period by email or text. You MUST call me by telephone with a reason for cancellation. Cancellations within 24 hours before appointments should never be made unless you have an emergency. All Participants receive ample notices for scheduled, upcoming appointments: an initial confirmation email message, email reminders at 24 and 12 hours before appointments, and a text message reminder 15 minutes before appointments. The emails and text messages will come from Acuity Scheduling. Please also read Section II: Personally Identifiable Information (PII), and Section III: P2P SMS Messaging Policy.

**Late Arrival:** Please call at the time of your scheduled appointments. I expect the same promptness an employer would expect. If you are late and I do not hear from you within 10-15 minutes of your scheduled time, the appointment is a no-show, and you will need to reschedule. Repeated late arrivals and without a valid reason will necessitate a discussion about timeliness. Continued tardiness may result in case closure.

**No-call / No-shows:** Access to Acuity Scheduling may be suspended temporarily. You will be asked to review the Communication Policy, and you must call Your Amazing Journey, LLC with a valid explanation for the missed appointment and to reschedule. Repeated no shows will necessitate a discussion about timeliness and may result in case closure.

**Termination of Services:** Frequent cancellations or missed appointments may result in discontinuation of services with Your Amazing Journey, LLC. Failure to follow through on services outlined in a Participant's IWP (Individualized Work Plan), and/or failure to schedule regular appointments that lead to progress in a Participant's case may necessitate case closure and referral to other services. Please also read the Service Frequency section below and the final note in large italic print at the end of this document about this.

**SMS Messaging:** Please read Section II, Personally Identifiable Information (PII), and Section III about SMS, below.

**Availability and Scheduling Limits:** The scheduling availability hold is **currently** 48 hours. This means that the soonest a new appointment can be scheduled is 48 hours in the future from any given date and time. Please note that occasionally there is reason to reduce or extend this hold.

For Participants in the **pre-employment phase:**

- Participants are offered the Regular Hours Schedule (daytime hours).
- Participants will have one 60-minute appointment per week.
- Participants who want to move more quickly through the pre-employment phase may be offered more than one appointment per week. However, Participants who no show or cancel within 24 hours of appointments without good reason may not be offered this option.

During the **employment phase:**

- Working Participants are offered the Evenings Schedule (unless due to their work schedule, daytime hours are more suitable).
- Participants will have at least one 30-minute appointment per month. You have the option of scheduling a 60-minute appointment.
- \*\*\* Weekend appointments are no longer offered.
- New Participants who are already working will have the option / may need to schedule more than one appointment weekly, initially. Then, progressing to less frequent appointments.

**Service Frequency:** ADEN and SSA policy for service frequency varies across the lifespan of a case, but to prevent confusion, to ensure adherence to the SSA's requirements, and to ensure the provision of quality services, we will use the following guidelines. Services are scheduled no more than 30 days apart and at least one service per month must be a two-way communication. Generally, services are provided during appointments. However, non-appointment (one-way and two-way) services are also given. Example 1: email or postal mail with content that qualifies as a service, without your response to it (a one-way non-appointment service). Two-way communication about the same resource (we have a conversation about it) makes it a two-way service. Please understand that communications are not just limited to the Services listed below; however, these services are the foundation of the work we do and will be provided as outlined in each Participant's (IWP) Individualized Plan for Employment.

- New regulations from Social Security:
  - **Cases must now be reviewed more frequently.** The network cannot keep a case open without payments (which occur when Participant's return to work earning above certain income thresholds) for more than 24 months. However, Social Security now requires a review at 18 months. But this should not be viewed lightly. ADEN is now reviewing cases on a regular basis to determine whether Participants are benefiting from the program. Participants who fail to communicate, fail to schedule regular telephone or video appointments, fail to work toward their IWP goals, or who demonstrate they do not need Services will be reviewed for closure and referral elsewhere.
- *Following, is a list that Social Security considers services.*
  - Benefits and Work Incentives Advisement (BWIA)
  - Career Assessment
  - Career Counseling
  - Resume, Cover Letters
  - Job Search Help
  - Interviews (tips, mock interviews, etc.)
  - Job Accommodations
  - Ongoing Employment Support

- Financial Services Support – NDI <https://www.nationaldisabilityinstitute.org> has a strong financial wellness initiative. (Please subscribe to NDI email updates at the link above!)
  - Community Referrals
  - Attempted Contact/Cancelation - communication to keep the process moving forward in the event of such occurrences.
- **The scheduling links** are provided in the Services menu of <https://youramazingjourney.biz>. Following, is a direct link to the page: <https://youramazingjourney.biz/services/ssw-scheduling>.
  - **Contact between appointments:** Participants are welcome to contact Your Amazing Journey, LLC anytime between appointments for any reason, whether it be vocational or personal. Please also see Exceptions to the Protection of PII in section II below.

## II. PERSONALLY IDENTIFIABLE INFORMATION (PII)

- Please use email and phone SMS messaging wisely. No Personally Identifiable Information (PII) is allowed via these methods.
  - **\*\*\* For example**, please do not share your Social Security number, personal address, account numbers, phone numbers, email addresses, last name, medical records, employment records, Social Security documents, IRS records, documents from any other social service program, or any other PII by these methods.
  - **\*\*\* Pay stubs** have one additional restriction and should not be sent by postal mail due to the delivery time. Please send all pay stubs by fax or HIPAA-compliant upload, with your Social Security number written on each pay stub.
- As a reminder, acceptable methods for transmitting PII are telephone (voice) calls to (716) 462-6296, fax to (716) 463-2843, and postal mail. ADEN also now offers secure file upload options for documents. To learn about these, contact Your Amazing Journey, LLC.
- **SMS Messaging by Telephone:** SMS messages are a valid communication method except for scheduling-related matters. As of 2023 Social Security has approved SMS for communication between Employment Network providers and their Participants. Your Amazing Journey, LLC has a 1,000-minute monthly messaging plan. Currently this is an ample quota that is not reached monthly. Please do feel free to communicate by SMS. However, please refrain from excessive messages. And please keep PII out of it!
- **Acuity Scheduling:** To schedule appointments, navigate to the SSW Scheduling page at the following link. <https://youramazingjourney.biz/services/ssw-scheduling>.
  - Please always remember to input your **First** name and then **ONLY the first initial of your last name** when scheduling. This is for confidentiality.
  - Please use **Title Case**. And please **do not put a period after the first letter of your last name**. Acuity will create a new client, resulting in you having more than one listing in Acuity. You won't see this, but I will when I log in. I am investigating a workaround for this, which may involve direct client-side login to Acuity Scheduling. Thank you for your cooperation. For example, **John Smith** as **John S**
  - Future directions: Considering HIPAA complaint version of Acuity. Though it is a highly secure platform, it would add protection.
- **Email:** Email is not secure enough to ever use for sending PII. However, Your Amazing Journey, LLC's email service is secure. A Microsoft Exchange business-level account, hosted by GoDaddy.com.
  - Future directions: While this is significantly more secure than a public email address (e.g., Outlook, Google), I may add HIPAA compliance to the account. Regardless, PII should still never be sent by email -- especially being Participants usually use public email platforms.
- **PII in a Nutshell:** Personally Identifiable Information (or PII), is any information that can identify you, your location, or confidential information about you that you would not want exposed to the public. ***If in doubt, leave it out!*** And send it by fax, postal mail, or upload it by one of the HIPAA-compliant filesharing methods. Or call and speak with me by telephone!

- **Exceptions to the Protection of PII:**
- Participant indicates intent to harm self or others, or there is reasonable cause to suspect such activity is occurring or will occur.
- Suspected child abuse or maltreatment: "New York State recognizes that certain professionals are specially equipped to fulfill the important role of mandated reporter of child abuse or maltreatment. Mandated reporters are required to report suspected child abuse or maltreatment when, in their professional capacity, they are presented with reasonable cause to suspect child abuse or maltreatment." (NYS Mandated Reporter Resource Center: <https://www.nysmandatedreporter.org/MandatedReporters.aspx>)

### III. P2P SMS MESSAGING POLICY

- Your Amazing Journey, LLC's telephone numbers are registered with The Campaign Registry (<https://www.campaignregistry.com>) (TCR). Please read Your Amazing Journey, LLC's P2P SMS Messaging Policy at <https://youramazingjourney.biz/resources/forms>. Participants will be sent this policy and will sign and return an Acknowledgement that they have read, understand, and agree with the policy. Participants must opt into SMS and can also opt out. However, opting out is not recommended, as text messaging is a very helpful communication method, and appointment reminders come by email and text. Please read the messaging policy linked above in this paragraph for details.
  - "Mobile carriers now require all business SMS users to register with The Campaign Registry (TCR) to ensure compliance with new regulations. These requirements apply to all businesses sending an SMS from long code numbers (10dlc), including all RingCentral customers" (RingCentral, 2023). See <https://support.ringcentral.com/sms-registration>.

### IV. DOCUMENT RETENTION

- Please retain all documentation, whether paper or electronic, from the following. Why is this important? (1) Your Amazing Journey, LLC may request or ask you to refer to some of this information to help build your case and provide you with quality, thorough services; (2) You should have a record for yourself of this information in case you need to refer to it for any reason, or you need to provide copies to programs from which you seek services.
  - Social Security, your health insurance plan(s), and any other public service programs from which you receive or have received service (e.g., SNAP, heating assistance, public housing, the Affordable Connectivity Program, etc.).
  - Medical records, including services received, documentation of disability, medications.
  - Financial records: communication to and from the IRS, tax records, bank records, correspondence with legal services.
  - Employment records: (1) your work history including employers and dates of employment, supervisors' names and contact information, employment references; (2) notices of hire and termination; (3) pay stubs.

### V. COLLABORATION REGARDING DOCUMENTS

- Please contact Your Amazing Journey, LLC before acting on correspondence from Social Security, Medicare, Medicaid, and other public programs. And anytime you have questions about communication you receive. You agree to provide all pay stubs for jobs you work while connected to Your Amazing Journey, LLC, and ADEN. Sometimes new Participants may need to provide pay stubs for past work if the Participant has not reported wages for past work to Social Security. Please note that Your Amazing Journey, LLC will only evaluate past unreported wages if it is clear the Participant did not understand Social Security's reporting requirements, and the failure to report is not excessive. In cases of excessive failure to report or dishonesty, Participants will be referred to other service options.

## VI. CHANGES IN PERSONAL INFORMATION

- You must notify Your Amazing Journey, LLC, Social Security, and other public benefit programs of changes in your personal and employment information. You must notify Your Amazing Journey, LLC before you start or plan to leave a job. All Participants sign a form permitting information exchange between Your Amazing Journey, LLC and the Participant's local Social Security office; therefore, Your Amazing Journey, LLC can exchange information with SSA and advocate on your behalf. Please read the following article about reporting changes to Social Security: Reporting Changes is Your Responsibility | SSA <https://blog.ssa.gov/reporting-changes-is-your-responsibility>

## VII. CONFIDENTIALITY

- Please know that all information and documentation you provide to Your Amazing Journey, LLC or that other organizations send to Your Amazing Journey, LLC on your behalf is held with the strictest confidentiality and security. Your Amazing Journey, LLC does not keep paper records. All Participant records are kept in ADEN's secure database, SETWorks, approved by Social Security. The only exceptions to confidentiality are those listed in section II above, and when Participants sign a consent for release/exchange of information. All paper records that Your Amazing Journey, LLC receives are destroyed after they are uploaded SETWorks.
- Your Amazing Journey, LLC uses a variety of services to communicate with Participants:
  - Postal mail, telephone (RingCentral), fax, email, HIPAA-compliant file sharing through SETWorks and Filemail, Constant Contact (used for auto-emailed newsletter and pay stub reminders, other communications if needed), and video conferencing (RingCentral).
  - Postal mail, telephone, fax, RingCentral, SETWorks, and Filemail are secure methods for sharing PII.
  - Standard email and text messaging are not secure enough for exchanging PII.
- Your Amazing Journey, LLC also uses Acuity Scheduling for appointment setting and Stamps.com to manage postage and mail preparation. In Acuity Scheduling only your email address, phone number, first name, and first initial of your last name are stored. In Stamps.com your full name, postal address, phone number, and email address are stored. In Filemail, a HIPAA-compliant filesharing service, your first and last name, and email are stored. Document retention is generally no more than 30 days for each document sent or received.
- While all these means of communication are highly secure, and each service takes strict measures to protect information, data breaches can occur. If any breach of data occurs, Participants will be notified immediately. Your Amazing Journey, LLC will not be held liable for PII that is exposed due to Participants' failure to transmit PII by secure methods, or in cases where data exposure is beyond the control of Your Amazing Journey, LLC.

## VIII. EMERGENCIES & SAFETY

- **Medical Emergencies:** Please immediately call **911**.
- **Psychiatric Emergencies:**
  - **National Suicide Prevention Lifeline:** Dial **988** If you have an emergency that requires immediate intervention.
- **Warmlines:** For individuals who are apprehensive about calling 988, there is an alternative.
  - "Most states in the US have warmlines. If possible, it's a good idea to call a warmline in your state or in another state nearby. If there's no warmline in your state or if you feel uncomfortable calling a local line, many warmlines do accept calls from all over the country. While many warmlines are available 24/7, some are open only on certain days and times. Please note: all times of operation are listed according to the time zones where each warmline is located. If you call a warmline in a different time zone, pay attention to the change in time. Some warmlines have limits on the amount of time you can call. For example, they might tell you up-front that they can only speak to you for an hour. Others have unlimited time and do not stop conversations until you are ready. When you call, they might ask for some information, like where you are calling from (Mental Health America, 2023)"

- Source: [https://screening.mhanational.org/content/need-talk-someone-warmlines/?layout=mhats.actions\\_i](https://screening.mhanational.org/content/need-talk-someone-warmlines/?layout=mhats.actions_i)
- Warmline directory: <https://warmline.org/warmdir.html#directory>
- The New York State warmline, **The Empowerment Center in New York**, is available 24 hours a day at **1-800-643-7462**, and service all U.S. states.

### **Sexual Assault:**

- If you have experienced a sexual assault, get to a safe place, and call **911**.
- For immediate support call the National Sexual Assault Hotline at **1-800-656-HOPE (4673)** or chat live with the National Sexual Assault Online Hotline at <https://hotline.rainn.org/online>.
- More information: When to report an assault (<https://www.womenslaw.org/about-abuse/forms-abuse/sexual-abuse-and-exploitation/sexual-assault-rape/steps-take-after-sexual-1>)

### **Domestic Violence:**

- Call **911** if you are in immediate danger. If it is possible, get to a safe place first.
- If you are **in crisis** and need immediate help:
  - For anonymous, confidential help, 24/7, please call the National Domestic Violence Hotline at **1-800-799-7233 (SAFE)**. More information: <https://ncadv.org/get-help>.
- In New York State, contact the Office for the Prevention of domestic Violence, 24/7 for confidential support:
  - Telephone support line: **1-800-942-6906**
  - By text: **844-997-2121**
  - Or by chat <https://opdv.ny.gov>.
  - New York State Domestic Violence Program Directory: <https://www.nyscadv.org/find-help/program-directory.html>

### **U.S. Veterans' Crisis Line:**

- Dial **988** then **press 1**.
- Information: [veteranscrisisline.net](http://veteranscrisisline.net)

**Follow Up:** If you experience an emergency or have contacted one of the above options for help, please follow up with a contact to Your Amazing Journey, LLC about the situation as soon as it is safe to do so, and you are able to do so.

## **IX. POLICY ACKNOWLEDGMENT & CHANGES**

**Acknowledgement:** Participants are given the Communication and SMS Policies and acknowledgment forms at application, must read and agree to this policy when scheduling appointments, and will be asked to review this policy in the case of frequently cancelled or missed appointments.

Your Amazing Journey, LLC will provide a link where Participants can download and print the policies and acknowledgment forms. See below. For those who cannot print, the policy and form will be sent by postal mail. New Participants will sign and return an Acknowledgment they have read the policy, understand it, agree to abide by it, and understand the consequences of failing to abide by it. And that they have read and are aware of the options for emergency help.

**Policy reviews and changes:** Your Amazing Journey, LLC reserves the right to change this policy at any time. Participants will be notified by email when changes are made and will be asked to respond by email, they have read and agree to the update.

The current version of the Communication Policy and SMS Policy are available at the Forms page, at <https://youramazingjourney.biz/resources/forms>. To manually navigate to there, use the following options.

- Go to <https://youramazingjourney.biz> and from the main menu, select Services and Policies.
- Go to <https://youramazingjourney.biz> and from the Resources menu select Forms.

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### A FINAL: NOTE:

*Please use the same consideration in your communications with Your Amazing Journey, LLC/ADEN as you would with an employer. Please note that I do not receive payments on your case until you return to work. Respect the time and energy that I put into helping you. I highly value my Participants. However, please know that I reserve the right to discontinue service, close a case, and unassign a Ticket to Work for any Participant who consistently abuses the Communication Policy.*

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If you have any questions about this information please contact Your Amazing Journey, LLC.