Introduction

Work Incentives Planning and Assistance (WIPA) is a key component of Social Security's strategy to promote employment among disability beneficiaries and reduce dependence on SSI and Title II cash benefits. Over the past 16 years, the National Training and Data Center (NTDC) at Virginia Commonwealth University (VCU) has trained and certified more than 2,500 individuals to provide individualized work incentive counseling services to beneficiaries seeking to pursue their career goals and increase their financial independence. These highly skilled professionals have met the needs of more than 800,000 beneficiaries in all 50 states, the District of Columbia, and seven U.S. territories. The CWICs assist beneficiaries to make employment and financial decisions, including:

1. Developing short and long term financial goals;
2. Understanding the effect of increased earning on eligibility status and benefit amount of Social Security disability and other federal benefits;
3. Making decisions related to the use of public and private health care options;
4. Accessing and benefiting from community resources such as credit repair services, tax preparation assistance, financial education services, and other related supports; and
5. Using Individual Development Accounts, ABLE accounts, and other savings vehicles to achieve savings and asset acquisition goals.

The CWIC Certification Program

The NTDC provides training and certification to individuals wishing to acquire the knowledge and skills necessary to provide intensive WIPA services to Social Security beneficiaries. The certification process consists of five components:

Component 1: First, individuals participate in a five-day (32-hour) face-to-face training class. The training class addresses each of the training competencies found in the National Training Curriculum. The NTDC conducts 10-12 Initial Training classes each year.

Component 2: Individuals engage in extensive self-study activities to prepare for and complete the required certification assessments. Self-study activities include review of the National Training Curriculum, review of other resource documents, and individual or group study calls moderated by the NTDC trainers. Data reported by individuals completing the certification process revealed that, on average, they spend approximately 25 hours completing the self-study activities.

Component 3: Individuals are required to complete competency-based assessments that address each of the modules of the National Training Curriculum. Individuals complete assessments entirely online using the Blackboard Learning System. Assessments consist of objective test items, essay responses, and case studies.

Component 4: Individuals who successfully complete the first set of assessments are eligible to begin Part Two of the assessment process. During Part Two, participants are required to submit three Benefit Summary and Analysis reports over a 12-month period for review and evaluation. Those who successfully complete this process receive full certification.

Component 5: Finally, individuals completing the certification process participate in NTDC Supplemental Training and Technical Assistance Activities. The activities include distance based training, as well as individual, state, and regional technical assistance. Beginning in 2016, certified WIPA CWICs and certified Community Partner Work Incentives Counselors were required by Social Security to participate in NTDC ongoing training opportunities and accrue 18 Continuing Certification Credits (CCCs) annually in order to maintain their certification.

The Structure of the National Training Curriculum

The National Training Curriculum is the foundation of all NTDC training and certification activities. The training activities and content contained in the curriculum are based upon a comprehensive set of competencies that individuals must acquire in order to be certified to provide work incentives planning and assistance services to Social Security beneficiaries. The Social Security-approved competencies have been grouped into seven distinct competency areas. These training modules are identified and briefly described below.

Major Work Incentives Counseling Competency Areas

1. Supporting Increased Employment and Financial Independence Outcomes
2. Partnering with Community Agencies and Conducting Community Outreach
3. Understanding Social Security Disability Benefits and Associated Work Incentives
4. Providing Healthcare Planning and Counseling
5. Understanding Other Federal Benefits and Associated Work Incentives
6. Providing WIPA Services that Promote Employment and Increase Financial Independence
7. WIPA Standards, Data Collection Requirements, and Quality Considerations for CWICs

Major Competency Areas

Competency Area 1: Supporting Increased Employment and Financial Independence Outcomes

Module 1 opens with a detailed description of WIPA services and the CWIC's role in promoting employment and financial independence for Social Security beneficiaries. This module also provides an overview of Social Security's recent efforts to promote employment and increase financial independence for disability beneficiaries, including the Ticket to Work and Self-Sufficiency Program, Social Security/Vocational

Rehabilitation (VR) Reimbursement program, Work Incentives Planning and Assistance (WIPA) program, and Protection and Advocacy for Beneficiaries of Social Security (PABSS) program.. This module also provides information about state VR agencies, American Jobs Centers, and other public or private programs that fund or provide employment services for Social Security disability beneficiaries, including the local employment services and supports available to assist beneficiaries. Content addresses eligibility criteria, referral procedures, and services available from various entities such as state VR agencies, American Job Centers administered by state Workforce Development agencies, and other employment programs or key stakeholders in the disability services system.

Competency Area 2: Partnering with Community Agencies and Conducting Community Outreach

Module 2 focuses on providing effective outreach to Social Security beneficiaries as well as outreach activities designed for community agencies, stakeholder groups, and partner agencies. Module 2 also describes how WIPA projects work collaboratively with the Ticket Program Manager (TPM) and the Ticket to Work Help Line to conduct outreach to Social Security disability beneficiaries who are eligible for the Ticket to Work program. Finally, content addresses strategies CWICs can use to work collaboratively with other public and private community-based organizations such as Social Security field offices, Employment Networks (ENs), American Job Centers, state VR agencies, public schools, mental health organizations, and Individual Development Account (IDA) or asset-building organizations.

Competency Area 3: Understanding Social Security Disability Benefits and Associated Work Incentives

Module 3 presents detailed information on the Title II and SSI disability programs and work incentives, including how wage employment affects eligibility for benefits, cash payment amounts, and Medicare and Medicaid coverage; the impact of earned income on SSI and Title II disability benefits for concurrent beneficiaries; and the effect of Net Earnings from Self-Employment (NESE) on SSI and DI cash payments. This module also provides technical information about all the relevant Social Security work incentives such as Plans to Achieve Self-Support (PASS), Student

Earned Income Exclusion (SEIE), Blind Work Expenses (BWE), Trial Work period (TWP), Extended Period of Eligibility (EPE), Subsidy & Special Conditions, Impairment Related Work Expenses (IRWE), and Expedited Reinstatement (EXR). Finally, Module 3 offers a comprehensive description of the Ticket to Work program, including Ticket eligibility, assignment and unassignment procedures, reporting requirements, timely progress requirements, and making referrals to ENs and state VR agencies.

Competency Area 4: Providing Healthcare Planning and Counseling

Module 4 provides detailed information on the availability of and eligibility for the Medicaid program, including optional Medicaid groups, Medicaid Buy-in programs, Medicaid waiver programs, Medicare Savings Programs, and Special Medicaid Beneficiaries. This module also covers eligibility for and the operations of the federal Medicare program; availability of alternate health insurance coverage options (employer-sponsored health plans and private plans for small self-employed individuals); and federal legislation protecting the healthcare rights of persons with disabilities. Finally, Module 4 covers key provisions of TRICARE and the Department of Veterans Affairs (VA) healthcare programs for veterans and how these programs interact with Medicare and Medicaid, as well as key components of the Affordable Care Act (ACA) applicable to Social Security disability beneficiaries and their families.

Competency Area 5: Understanding Other Federal Benefits and Associated Work Incentives

Module 5 provides information on federal benefits programs and their associated work incentives, including Temporary Assistance to Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), Housing and Urban Development (HUD) subsidies, Workers' Compensation, Unemployment Insurance (UI) benefits, veterans' benefits, and IDAs. This module also describes the interaction of these programs with Social Security disability benefits.

Competency Area 6: Providing WIPA Services that Promote Employment and Increase Financial Independence

Module 6 addresses the practical application of public benefits and work incentives knowledge, including identifying eligible beneficiaries for the WIPA program and prioritizing initial contacts; conducting initial information gathering interviews; developing written Benefits Summary & Analysis (BS&A) documents; preparing written Work Incentives Plans (WIPs), and facilitating the use of necessary and appropriate work incentives. This module also discusses specific strategies for effective time management in the provision of WIPA services.

Competency Area 7: WIPA Standards, Data Collection Requirements, and Quality Considerations for CWICs

Module 7 covers the minimum compliance requirements for WIPA projects as stated in the WIPA Cooperative Agreement Terms and Conditions as well as the WIPA data collection duties required by Social Security using the WIPA National Data System. This module also includes a unit that identifies specific indicators of high-quality WIPA services and describes the CWIC's role in achieving these objectives. Finally, the module provides information on delivering WIPA services that adhere to the highest ethical standards, fully comply with the Americans with Disabilities Act and the Rehabilitation Act, and accommodate linguistic and cultural differences.

The National Training and Data Center at Virginia Commonwealth University

The National Training and Data Center at VCU is a collaborative effort of several partnering agencies responsible for implementing a comprehensive program of training and technical assistance to professionals providing intensive WIPA services to Social Security beneficiaries.

NTDC services are directed and administered by Susan O'Mara, the NTDC's Director. The NTDC provides training and technical assistance activities through our national network of technical assistance liaisons. These liaisons and our administrative team are identified below.

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Susan O'Mara and John Kregel
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