

Introduction

Work Incentives Planning and Assistance (WIPA) is a key component of Social Security's strategy to promote employment and economic self-sufficiency among disability beneficiaries and reduce dependence on SSI and Title II cash benefits. Over the past 19 years, the National Training and Data Center (NTDC) at Virginia Commonwealth University (VCU) has trained and certified more than 3,000 individuals to provide individualized work incentive counseling services to beneficiaries seeking to pursue their career goals and increase their financial independence. These highly skilled Community Work Incentive Counselors (CWICs) and Community Partner Work Incentive Counselors (CPWICs) have met the needs of more than 800,000 beneficiaries in all 50 states, the District of Columbia, and five U.S. territories. The CWICs and CPWICs assist beneficiaries to make employment and financial decisions, including:

1. Developing immediate and long term financial goals;
2. Understanding the effect of increased earnings 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 coverage options;
4. Obtaining employment services from Employment Networks (ENs), state Vocational Rehabilitation (VR) agencies, or other community organizations;
5. Accessing and benefiting from community resources such as credit repair services, tax preparation assistance, financial education services, and other related supports; and
6. Using Achieving a Better Life Experience (ABLE) accounts, Individual Development Accounts (IDAs), and other savings vehicles to achieve savings and asset acquisition goals.

The CWIC/CPWIC 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: 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 a series of 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 NTDC trainers. Data reported by individuals completing the certification process reveal that, on average, they spend approximately 25 hours completing the self-study activities.

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

Component 4: Individuals who complete the first set of assessments are eligible to begin Part II of the assessment process. During Part II, participants submit three Benefit Summary and Analysis reports over a 12-month period for review and evaluation. WIPA CWICs must also complete the Providing Effective Work Incentives Supports on Other Federal Benefits web course. Those who complete these requirements receive full certification.

Component 5: Finally, individuals completing the certification process participate in NTDC supplemental training and technical assistance activities. These activities include distance-based training, as well as individual, state, and regional technical assistance. Social Security requires certified WIPA CWICs and CPWICs to participate in ongoing NTDC training opportunities and accrue 18 Continuing Certification Credits (CCCs) annually to keep their certification.

The Structure of the National Training Curriculum

The National Training Curriculum is the foundation of all NTDC training and certification activities. We base the training activities and content in the curriculum on a comprehensive set of competencies that individuals must acquire to be certified to provide work incentives planning and assistance services to Social Security beneficiaries. We have grouped the Social Security-approved competencies into seven distinct competency areas. We identify and briefly describe these training modules below.

Major Work Incentives Counseling Competency Areas

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

Major Competency Areas

Competency Area 1: Supporting Increased Employment and Financial Independence Outcomes for Social Security Disability Beneficiaries

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 (TtW), Social Security/VR Reimbursement program, WIPA program, and Protection and Advocacy

for Beneficiaries of Social Security (PABSS) program. This module addresses eligibility criteria, referral procedures, and services available from various entities such as state VR agencies, American Job Centers administered by state Workforce 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 directed toward community agencies, stakeholder groups, and partner agencies. Module 2 also describes how WIPA projects work collaboratively with the Ticket Program Manager (TPM) and the TtW Help Line to conduct outreach to Social Security disability beneficiaries who are eligible for the TtW program. Finally, the module 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 Title II 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 TtW 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: 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 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 Effective WIPA Services

Module 6 addresses the practical application of public benefits and work incentives knowledge. It describes procedures for identifying eligible beneficiaries for the WIPA program and prioritizing initial contacts, conducting initial information gathering interviews, providing Information and Referral (I&R) services, 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 and Quality Considerations for CWICs

Module 7 describes the minimum compliance requirements for WIPA projects as stated in the WIPA Cooperative Agreement Terms and

Conditions. It also includes a unit that identifies specific indicators of high-quality WIPA services and addresses the CWIC's role in achieving these goals. 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 NTDC at VCU is a collaborative effort of several partnering agencies responsible for implementing a comprehensive program of training, certification, technical assistance, and ongoing professional development to individuals providing intensive work incentive counseling services to Social Security beneficiaries.

Susan O'Mara, the NTDC's Director and Co-Principal Investigator, leads our team of trainers, technical assistance liaisons, technology and accessibility specialists, and administrative professionals. We identify these team members below.

National Training and Data Center Trainers/Technical Assistance Liaisons

Becky Banks

Phone: 765-674-5886

Email: rrbanks@vcu.edu

Ray Cebula

Phone: 617-312-3261

Email: rac79@cornell.edu

John Coburn

Phone: 737-333-2536

Email: vcjohn@vcu.edu

Laura Coffey

Phone: 502-479-5865
Email: ljcoffey@vcu.edu

Gail Falk

Phone: 320-251-4137
Email: gafalk@vcu.edu

Connie Ferrell

Phone: 765-352-9448
Email: cferrell_connie@yahoo.com

Julie Koehler-Harkness

Phone: 740-763-7228
Email: jkoehler@vcu.edu

Kelley Land

Phone: 702-459-7574
Email: landk@vcu.edu

Lucy Miller

Phone: 502-899-1391
Email: lamiller@vcu.edu

Cathy Randall

Phone: 251-300-7708
Email: cmrandall@vcu.edu

Mary Ridgely

Phone: 608-455-1563
Email: mridgely@vcu.edu

Shannon Smiles-Tharp

Phone: 304-870-4475
Email: sgsmiles@vcu.edu

National Training Center Administrative Team

Susan O'Mara, Director and Co-Principal Investigator

Phone: 757-620-5451

Email: soevans@vcu.edu

Molly Sullivan, Director of Training and Certification

Phone: 503-703-3650

Email: masullivan@vcu.edu

Leigh Wright, Assistant to the Director

Phone: 301-790-1276

Email: lmjones3@vcu.edu

Julie Schall, Administrative and Technology Coordinator

Phone: 804-827-0741

Email: jaschall@vcu.edu

Nakia Commodore, Contract Administrator

Phone: 804-828-2786

Email: wynnnd@vcu.edu

John Kregel, Co-Principal Investigator

Phone: 804-828-1872

Email: jkregel@vcu.edu

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Susan O'Mara

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