

# **Module 2 – Partnering with Community Agencies and Conducting Community Outreach**



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# Module 2 – Partnering with Community Agencies and Conducting Community Outreach

## Introduction

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CWICs don't promote employment outcomes for beneficiaries of Social Security disability programs in isolation. WIPA services are only one piece of the employment puzzle; combine them with vocational counseling, job search assistance, job accommodations, and other employment-focused services and supports to achieve significant gains.

Content in this module begins by focusing on how to provide effective outreach. It includes descriptions of activities that target Ticket-eligible beneficiaries and other Social Security beneficiaries with disabilities in the geographic area, as well as outreach activities designed for community agencies, stakeholder groups, and partner agencies. The second unit of this module provides information on how WIPA personnel should interact and work collaboratively with the Ticket to Work Help Line, a major source of WIPA referrals. Finally, content focuses on how to work with other public and private community-based organizations such as Social Security field offices, American Job Centers, state Vocational Rehabilitation (VR) Agencies, Employment Networks (ENs), public schools, mental health organizations, and IDA/Asset Building organizations.

## CWIC Core Competencies

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- Designs and implements outreach strategies targeted toward transition-age youth and young adult beneficiaries, including individuals in secondary and post-secondary education, school-to-work transition, and vocational training programs to increase access to and benefit from WIPA services and the Ticket to Work program.
- Develops and implements outreach strategies designed specifically to increase WIPA service delivery to traditionally

underserved populations within the catchment area such as veterans with disabilities, homeless individuals, beneficiaries in rural or dense urban areas, and individuals from diverse ethnic or linguistic backgrounds.

- Collaborates with Employment Networks (ENs) or other public and private community-based organizations (e.g., state VR agencies, American Jobs Centers) through interagency agreements or other information or resource-sharing mechanisms to support employment outcomes and increased financial stability for beneficiaries.
- Works collaboratively with the Ticket Program Manager (TPM) and the Ticket to Work Help Line to conduct outreach to Social Security disability beneficiaries eligible for the Ticket to Work program. Works collaboratively with the Help Line to ensure timely response to referrals, and effective and accurate responses when referred beneficiaries aren't appropriate for services.
- Interacts effectively with Social Security field office personnel and Area Work Incentives Coordinators (AWICs) in the provision of WIPA services.
- Collaborates with local financial services and asset development agencies, such as banking, financial education, credit repair, Individual Development Account (IDA) programs, tax assistance, and other services to promote the successful participation of beneficiaries in programs designed to increase financial stability.

# **Competency Unit 1 – Performing Outreach to Social Security Beneficiaries with Disabilities, Community Agencies, and Other Key Stakeholders**

## **The Importance of Outreach**

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Outreach activities introduce WIPA services to potential users including Social Security disability program beneficiaries and the agencies most likely to refer them. The outreach process is primarily a marketing or sales function. The outreach activities you perform are similar to what salespeople in the business world do. The objective of this specialized marketing effort is three-fold:

1. Raise awareness of WIPA services within the disability community; educate beneficiaries and agency personnel about what WIPA services include and who Social Security intends them to assist.
2. Promote employment of people with disabilities by educating beneficiaries and agency personnel on how earned income affects public benefits and how work incentives can help achieve employment goals.
3. Establish relationships with other agency personnel who support individuals with disabilities in their efforts to obtain and maintain paid employment. These disability professionals are helpful partners in your mission to increase employment outcomes for persons with disabilities.

Begin marketing WIPA services by finding ways to reach the targeted customer base — Social Security beneficiaries with disabilities who are interested in employment. You can reach eligible beneficiaries by contacting agencies that serve them, particularly agencies that provide vocational or employment services.

This unit includes marketing and sales methods for contacting these agencies. The main goal of these marketing activities is to solicit appropriate referrals from partner agencies in the local community. CWICs are responsible for informing and encouraging community agencies to refer eligible, high-priority individuals for WIPA services and to encourage beneficiaries to utilize work incentives planning services in their efforts to enter the workforce.

Outreach activities also include educating beneficiaries and community agencies about the effect of employment on the various public benefit programs. Education is critical because so much misinformation and misunderstanding surrounds this issue. Unfortunately, much of this misinformation is spread within the disability services community by well-intentioned but uninformed agency personnel. An important objective of outreach to disability services agencies is to increase community awareness of the many work incentives available to beneficiaries. The message of this educational effort is that employment and public benefits aren't necessarily mutually exclusive. It's quite possible for Social Security beneficiaries with disabilities to work and retain cash payments as well as medical benefits. It's also possible to work and have an overall better financial outcome than by remaining solely dependent on public benefits. Increasing awareness of Social Security work incentives can ease the fear and uncertainty about employment many beneficiaries and the professionals who serve them feel. Knowledge of Social Security work incentives truly is power in this instance.

Finally, CWICs perform outreach to establish networks with key community stakeholders. WIPA services won't be successful if CWICs provide them in a vacuum. Many other players should participate in the process of work incentives planning for real change to occur. We describe the primary stakeholder groups in Unit 3 of Module 1, but they include:

- State Vocational Rehabilitation Agencies (SVRAs);
- Employment Networks (ENs) under the Ticket to Work program;
- State or regional Workforce Investment Boards (WIBs) and American Job Centers (AJCs);
- State or local intellectual disability or developmental disability agencies;
- State or local mental health or substance abuse agencies;

- Centers for Independent Living (CILs);
- State protection and advocacy agencies (P&As);
- Public school systems;
- Individual Development Account (IDA) or asset development programs; and
- U.S. Department of Veterans Affairs (VA)

Outreach activity must be a two-way street that builds reciprocal relationships. It's not just about stakeholders knowing what WIPA services entail. It's equally important to build relationships with key players and understand their roles. You will rely on these stakeholders as you work with beneficiaries to promote employment and enhance financial independence. The more you interact and collaborate with other community stakeholders, the more successful WIPA services will be. Unit 3 of this module contains more details about how to work collaboratively with these stakeholder groups.

## **WIPA Outreach Considerations**

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Plan carefully before you conduct outreach to make sure you achieve effective results. Before you review specific strategies, consider the following important factors of the outreach function.

### **Social Security's Expectations for WIPA Outreach Activities**

WIPA personnel must understand Social Security's expectations for WIPA outreach activities. Social Security defines outreach as activities that include but aren't limited to: describing WIPA services prominently on the organization's website; engaging in dialogue with community, local, and state service providers to increase WIPA referrals; and meeting with diverse audiences to describe WIPA services. Based on specifications in the WIPA Terms and Conditions document, WIPA projects meet the following requirements:

- Limit outreach to 10 percent of work effort and expenditures.
- Limit travel costs associated with outreach efforts and, as feasible, coordinate outreach events with community partners

including Area Work Incentives Coordinators (AWICs), Protection and Advocacy for Beneficiaries of Social Security (PABSS) grantees, State VR agencies, American Job Centers (AJCs), and other programs that may benefit WIPA participants.

- Include the Ticket to Work Help Line as the primary contact for beneficiaries on websites, in brochures, and within outreach presentations to the **greatest extent possible** consistent with the WIPA business model and Help Line referral protocols. When the Ticket to Work Help Line refers beneficiaries to WIPA projects, serve the beneficiaries on a priority basis. Unit 2 of this module includes more information about how you should collaborate with the Ticket to Work Help Line.
- Outreach targeting transition age youth between the ages of 14 to 25, should include communication with schools, vocational rehabilitation programs, and parents.

Social Security conducts significant outreach for its work incentives programs through a Ticket Program Manager (TPM) contractor. Examples include Work Incentives Seminar Events (WISE), operating the Ticket to Work Help Line, and disseminating information through social media outlets. Social Security doesn't require WIPA projects to schedule and conduct WISE webinars, but values WIPA participation in these events. Social Security encourages WIPA project managers to support staff when invited to present on a WISE.

## **Budgeting Staff Time to Perform Outreach**

Marketing WIPA requires staff time and the ability to handle increased demand from beneficiaries who hear about services through your outreach. If WIPA personnel do too much outreach, there may not be enough time for personnel to serve beneficiaries. Increasing demand for WIPA services in excess of program capacity to deliver them isn't a desirable outcome. To avoid this, WIPA Project Managers must allocate no more than 10 percent of WIPA contract resources to outreach.

Managers must also consider how to deploy staff resources for outreach activity. Will all WIPA staff members share in this responsibility, or only designated staff? You will need to consider and frequently reassess the advantages and disadvantages to both strategies. Some CWICs might have more skills or interest in marketing. Others might be so skilled at work incentives counseling that it wouldn't make sense to have them

perform outreach while beneficiaries are waiting for service. Pay close attention to allocated staff resources to achieve the best overall results.

Outreach is an ongoing activity. The target population for services is fluid, with new customers continuously joining the disability rolls. In addition, community-based service agencies often have high rates of staff turnover, and current beneficiaries as well as existing staff also need regular information updates to keep WIPA services in the forefront. Busy disability services workers sometimes forget about community resources, and WIPA services are no exception. Contact community agencies frequently to help them stay aware of your services.

## **Developing and Following an Outreach Plan**

The outreach function may overwhelm CWICs who haven't performed this role in the past. The key to successful outreach is staying organized and planning carefully. Develop a written outreach plan that lists agencies prioritized for outreach and how you'll market to them. If outreach directly targets Social Security beneficiaries, clearly describe how to conduct those activities, too.

## **Effective Outreach Techniques for WIPA Projects**

Once you determine staff and timing for outreach, focus on how you will perform the outreach activity. Which strategies or techniques are most effective for your local stakeholder groups? A combination of techniques can maximize your chances of reaching the target audience. Remember, the objective is to spread the word about WIPA services to as many people as possible in collaboration with partner agencies. WIPA stakeholder groups include Social Security beneficiaries and professionals who provide services to them. Make sure to broadly disseminate information across this community. We provide brief descriptions of common CWIC marketing and public awareness activities below. This is by no means an exhaustive list. You know your local community best and should devise creative ways to market your services.

## **Outreach Activities Directly Targeting Social Security Beneficiaries with Disabilities**

Although there is no single mailing list of all Social Security disability beneficiaries, there are still ways to directly contact beneficiaries. One is to work with local agencies that have extensive mailing lists to send out

mass mailings, fliers, or email blasts announcing WIPA services. Some agencies distribute this information for free as a service to their clients. Agencies serving individuals with disabilities are prohibited by law from sharing their clients' contact information with any other entity.

Public school systems might be able to help you reach beneficiaries who are still in school. When possible, provide fliers to special education teachers, school counselors, or family resource centers to send home to parents. Schools might even mail fliers to students and their families or send an email message. WIPA projects could announce not only their services, but also invite students and families to attend an informational session about Social Security disability benefits and employment. Repeat the process every year to catch new students entering the system and to reinforce messages to students or families who have attended past informational sessions.

**The VCU NTDC website also contains several useful resource documents** and sample PowerPoint presentations WIPA personnel may use when performing outreach. Some materials are specifically designed for the transition age youth audience.

(<https://vcu-ntdc.org/resources/resourceDetail.cfm?id=7>)

In addition, WIPA projects may directly reach beneficiaries via traditional mass marketing techniques such as television or radio advertisements, public service announcements, or use of social media such as Facebook or Twitter. Remember, Social Security must approve all WIPA project-marketing materials.

## **Marketing Presentations to Community Agencies and Groups**

It's not enough to send letters of introduction to stakeholder agencies and then wait for referrals to arrive. You need to facilitate in-person meetings to explain what services you offer and how these services can help beneficiaries achieve their career goals. Providing marketing presentations to stakeholder groups and community agencies is an essential component of any outreach plan. WIPA projects need to plan all face-to-face outreach meetings very carefully.

**REMEMBER:** Social Security expects WIPA projects to limit travel costs associated with outreach efforts and, as feasible, coordinate outreach events with community

partners including Area Work Incentives Coordinators (AWICs), Protection and Advocacy for Beneficiaries of Social Security (PABSS) grantees, State VR agencies, America's Job Centers, and other programs that directly benefit WIPA candidates. Limit face-to-face outreach activity to events that will maximize the number of appropriate referrals. Avoid outreach activity that isn't likely to generate high-priority referrals.

Face-to-face outreach meetings should never be impromptu. Carefully plan them with agency management to include the largest audience possible. In some cases, the audience will only include professionals, but in other cases, the audience may include beneficiaries, family members, caregivers, and service providers. WIPA projects should seek to attract the largest and most diverse group possible. Hold meetings at various times to accommodate different schedules. Many family members won't be able to attend during standard work hours. Hold some meetings on nights or weekends to attract the most people possible.

Focus on general awareness of WIPA services during these meetings. Key information to provide includes:

- Description of services provided and any limitations on these services;
- Identification of the main objective of WIPA services;
- Description of who is eligible for services and which beneficiaries are a high priority for services; and
- Instructions on how to make referrals for services.

You must be clear about who isn't eligible for services to attract appropriate referrals. Don't assume the audience knows who to refer or who would benefit from WIPA services. Provide written information listing eligibility and criteria. The more you educate your referral sources, the less time you will waste handling inappropriate referrals.

Be clear about the goal of WIPA services during your presentations. Referral sources often think the program is designed to maximize public benefit payments or to keep beneficiaries from losing benefits due to employment. Neither of these perceptions is correct. In fact, the objective is to provide WIPA services that promote employment and enhance financial stability for Social Security disability beneficiaries. Put

this objective in writing to clearly identify the goal of WIPA services and avoid misconceptions.

When describing services, include examples of what types of assistance you don't provide. Community agencies frequently think WIPA projects provide representative payee services or actively manage benefits by reporting beneficiary income to Social Security. WIPA personnel should never engage in these functions. If referral sources have unrealistic expectations about what the program does, they will make inappropriate referrals or be disappointed in the services offered. Manage expectations by providing clear written information during presentations.

To find sample Social Security approved PowerPoint presentations you may use when you conduct outreach, go to the **[VCU NTDC website Resources – WIPA Outreach](https://vcu-ntdc.org/resources/resourceDetail.cfm?id=7)** (<https://vcu-ntdc.org/resources/resourceDetail.cfm?id=7>)

## **Participation in Resource Fairs**

Another useful strategy is to staff a booth at local resource fairs, conferences, or other large gatherings of stakeholder groups. These events may include state rehabilitation association meetings, conferences for special education teachers, or advocacy group meetings. You can reach a significant number of people in a relatively short time by attending these events. Even more effective is securing a place on the agenda to make a public awareness presentation. Staff these events with trained CWICs because beneficiaries commonly ask questions about their own situations. Prepare to provide information about the effect of work on benefits to beneficiaries attending these events, and hand out Social Security publications that describe work incentives (such as the Red Book) as well. You can find **[the current version of the Red Book online](https://www.ssa.gov/redbook/)** (<https://www.ssa.gov/redbook/>).

## **Dissemination of Marketing Materials**

CWICs often disseminate marketing materials to spread the word about work incentives counseling services. Materials often include brochures, fliers, posters, or other printed materials. Dissemination methods could include mass mailings, email blasts, brochures left at Social Security or VR office waiting rooms, or displaying posters where beneficiaries are likely to see them. Displaying posters prominently at the local Social Security office or in the waiting rooms of the local Medicaid or welfare

agencies is particularly effective. Be creative, and think about where your marketing materials will attract the most eligible people.

**IMPORTANT:** Social Security must approve in advance all WIPA project-marketing materials. The current Terms & Conditions document contains the following directive:

“WIPA grantees shall not distribute brochures, materials, articles, or website materials without first requesting review and approval from the designated Social Security Project Officer. Any approved publications shall contain the following disclaimer:

“This document is funded through a Social Security cooperative agreement. Although Social Security reviewed this document for accuracy, it doesn’t constitute an official Social Security communication.”

In all cases, any public-facing documents, website, brochures, etc., must also include the phrase “at taxpayer expense”. WIPA projects have some latitude with the phrasing, for example, “We developed this website at U.S. taxpayer expense” or “We published this brochure at U. S. taxpayer expense”.

If your WIPA project is developing outreach materials, contact your VCU Technical Assistance Liaison to see if approved examples are available for reference. VCU has created several outreach presentations or WIPA projects to use. You will find **these WIPA outreach materials on the VCU NTDC website** (<https://vcu-ntdc.org/resources/resourceDetail.cfm?id=7>).

## **Websites for WIPA Projects**

Maintaining a website for your WIPA project is a great way to disseminate information without incurring travel or postage expenses. Use a website to describe services and limits on services, communicate eligibility criteria, and explain how WIPA projects prioritize beneficiaries for services. Be sure to include specific information about how to request services or refer someone for services. You can also highlight success stories and provide summary information about work incentives. In today’s information-driven world, a Web presence is an absolute necessity.

WIPA projects must adhere to Social Security requirements when developing websites. First, the Office of Employment Support (OES)

Project Officer must approve all content in advance. Second, websites and other electronic communications must comply with Section 508 of the Rehabilitation Act. Contact your VCU NTDC TA Liaison for assistance with the presentation, accessibility, and readability of websites.

## **Using Social Media for Outreach**

In today's technological world, companies often use social media as part of their overall marketing and outreach plan. Social media platforms are web-based communication tools that enable people to interact with each other by both sharing and consuming information. The social media platforms most people are familiar with include Facebook, Twitter, Instagram, Snapchat, YouTube, and Blogs.

The Social Security Administration uses social media extensively to communicate with the public. You can learn more about these efforts by going to **Social Security's social media hub** (<https://www.ssa.gov/socialmedia/>). This web page also contains lots of written guidance about how to use social media in ways that protect privacy and meet all federal requirements.

WIPA projects may also use social media to get the word out about their services, share benefits counseling success stories and even provide information about how disability benefits are affected by paid employment. It's important to understand, however, that Social Security requires WIPA projects to submit all social media content for review and approval prior to posting it publicly.

## **Developing Effective Marketing Presentations**

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Before presenting WIPA services to stakeholders, be prepared to answer the audience's most important question: "What's in it for me?" If you are unable to articulate how your WIPA project can benefit them on a personal level, you won't be able to "sell" the service and receive referrals. People don't buy things they don't want or think they don't need — it's that simple.

An effective marketing presentation answers these four basic questions:

- What are the tangible benefits of WIPA services?
- What problems will WIPA solve?

- How will WIPA services prevent potential future problems?
- What are the unique “features” of WIPA services?

Answers will vary depending on the stakeholder group. Never assume what one group perceives as a benefit of WIPA services will be of equal value to another group. Each group will value different aspects of the program. Evaluate the interests of your stakeholders and customize your sales pitch to match.

When presenting, highlight the benefits of the service and what problems it will solve. Consider making a list of important benefits and features to include in handouts or show during presentations. Customize the list to meet the needs and interests of each stakeholder group. Making a list of benefits and features helps you think about the interests of the audience in advance. The more prepared you are to address their specific interests or concerns, the more effective your presentation will be. Speaking extemporaneously is never recommended — preparation and practice are the keys to success.

Be clear about the purpose of the presentation and stay on-message. Tell the audience what to expect in advance, then continue with the prepared presentation outline. Marketing talks are intended to help the audience understand what WIPA services include, who they serve, and what benefits they offer. They aren't the appropriate setting to train the audience on the details of the Social Security work incentives or other federal income support programs. Marketing and training are very different, and you must never confuse these functions. This is also not the time to counsel specific individuals, even if members of the audience ask case-specific questions. If questions about specific cases arise, ask to meet with the individual after the presentation for a private discussion. Addressing case-specific issues in front of a group often confuses the audience. Don't let audience members lead the presentation off-track.

Limit marketing presentations to 45-60 minutes, which should be sufficient to achieve your desired goals, particularly if you arrive prepared and stay on-message. The presentation must be accompanied by written materials, such as program brochures or fact sheets, to reinforce what is presented. Keep printed materials brief and user-friendly. Make sure to provide correct contact information and give instructions about how to access services.

Whenever possible, partner with other players to provide outreach or marketing presentations. If more than one WIPA project exists in the state, seek opportunities for staff members from different agencies to work together on marketing functions. WIPA projects should also collaborate with Social Security Area Work Incentives Coordinators (AWICs) on outreach efforts when possible. Additionally, most large Social Security offices have Public Affairs Specialists, Work Incentives Liaisons (WILs), or other staff who perform community awareness functions. Teaming up is a great way to build relationships and demonstrate the partnership between Social Security and the WIPA project.

### **“Staying On-Message”**

Communicating a clear and consistent message is crucial for a successful marketing campaign. This process is commonly referred to as “staying on-message.” While staying on message may be simple when selling a product like toothpaste, it becomes rather challenging when marketing a complex service such as WIPA. Even more challenging is selling the notion that employment and disability benefits aren’t mutually exclusive when beneficiaries have spent months or years proving to Social Security that they are incapable of working at a substantial level in order to initially qualify for benefits. To avoid misunderstandings, you must clearly state your message. You must convey the following five points whenever conducting outreach or marketing activities:

1. Paid employment and Social Security disability benefits aren’t mutually exclusive — beneficiaries don’t have to choose between work and benefits.
2. It’s possible to work (even full-time) and keep Medicaid and Medicare in almost every case.
3. It’s possible to work and come out ahead financially, even if Social Security and other agencies reduce or cease public benefits.
4. It’s possible to receive disability benefits again if they are stopped due to employment.
5. WIPA services aren’t intended to force people off of benefits or help them maximize use of public benefits.

If you focus on these points and constantly reinforce them, you can correct a great deal of misinformation. Repeat these points at every event and interaction with beneficiaries, family members, and community agency personnel so people can really understand the message and accept it as fact. Communicating this message is a never-ending process and one of the most basic services you will provide to your local community.

## **The “Anti-Message” — A Warning!**

There is one message you must be vigilant to avoid communicating. In the world of WIPA we refer to this as the “anti-message.” The intent of WIPA services isn’t to indefinitely keep individuals on disability benefits. You shouldn’t act as if it’s your job to “save” beneficiaries from benefit cessation or termination due to employment at all costs. You should not behave in ways that cause beneficiaries to unnecessarily fear working above SGA, earning wages over the SSI break-even point, or earning more than the 1619(b) threshold amount. Similarly, don’t routinely encourage all beneficiaries to suppress their wages or net earnings from self-employment (NESE) in order to retain benefit eligibility. Finally, it isn’t your duty to find some way, to reduce countable earnings to evade benefits cessation or termination.

While it may not be in the best immediate interest of some beneficiaries to fully terminate from benefits due to work, this is certainly NOT the case for all beneficiaries, or even most beneficiaries. Terminating from benefits isn’t a universally “bad” thing and isn’t harmful in the majority of cases. CWICs must not present this outcome in a negative way when counseling beneficiaries. In fact, those with the capacity to earn wages sufficient to cause termination are frequently better off financially by doing so as long as they consider all costs of employment and they continue to meet health care needs. Work with each beneficiary to determine what his or her goals are, and support him or her to achieve the highest earning potential possible within the framework of those goals. Counseling techniques or messages that discourage beneficiaries from working or frighten them into retaining attachment to public benefits is contrary to everything WIPA services work to achieve.

# Managing Beneficiary Expectations during Outreach

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An important aspect of successful marketing is managing beneficiary expectations. Many of us have experienced being sold a product after a salesperson has made many grandiose promises only to be disappointed after purchasing the product. That is something WIPA projects must avoid at all costs when marketing and delivering services. It's better to "undersell" the services and then exceed beneficiary expectations. This is how to create satisfied users of WIPA services.

## **Underselling = Developing Realistic Expectations**

The phrase "underselling" means helping beneficiaries achieve realistic and reasonable expectations of the benefits and outcomes of WIPA services. It's crucial to not make promises you can't keep.

An example of this would be telling beneficiaries that WIPA services will ensure that overpayments don't occur. No matter how diligent you might be in your work with a beneficiary, overpayments may occur.

Another example is to promise beneficiaries or service providers that you'll personally handle all work incentives issues such as claiming Impairment Related Work Expenses (IRWEs) or writing Plans to Achieve Self-Support (PASS). This is bad practice on several counts. First, you won't have time to fulfill commitments like this, nor would you want to foster this level of dependency with beneficiaries. Beneficiaries who receive WIPA services must be active participants in the process and need to understand they will have an active role in developing and managing work incentives.

Similarly, you may need to help Social Security personnel understand what they can reasonably expect from WIPA services. You aren't responsible for reporting wage information for beneficiaries, nor do you function as representative payees in managing benefits. You must have a crystal clear understanding of your role and its limitations. You must clearly and consistently communicate your role, and its limits to all stakeholder groups.

## **Over-Delivering = Exceeding Beneficiary Expectations**

CWICs who successfully manage the expectations of beneficiaries and referral sources are more likely to meet or exceed those expectations when providing WIPA services. For a CWIC, meeting expectations means providing clear, correct, and complete benefits information that helps beneficiaries achieve their employment goal and enhances financial stability. At a minimum, your job is to answer benefits questions, lay out available options, and provide specific information about the pros and cons of various courses of action. The ultimate goal, however, is to “over-deliver” services or go beyond what the beneficiary expects. This doesn’t mean you should do everything for the beneficiary. Exceeding expectations means being creative and going beyond merely answering questions posed by beneficiaries. It means applying your work incentives expertise to maximize the positive outcomes from employment.

## **Establishing Trust = Delivering Quality WIPA Services**

Finally, to be successful over time, you must establish trust by consistently delivering high-quality services. Word of mouth is a powerful marketing tool that can work to your advantage or disadvantage. Beneficiaries and agency personnel will talk to each other about their experiences with WIPA projects. A dis-satisfied beneficiary or community stakeholder can severely damage a program’s reputation for long periods of time. Slick marketing presentations will never make up for shoddy service delivery. Keep in mind that the beneficiary is only one of the “customers” you need to think about. You must also provide great service to referral sources and the other key stakeholder groups in order to protect the reputation of the program. Successful CWICs treat every interaction with a beneficiary or stakeholder as a valuable marketing opportunity.

## **Evaluating Outreach and Marketing Efforts**

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WIPA projects must track outreach activities to determine which are most effective in soliciting referrals. Projects that maintain and review good outreach data will learn a great deal about which activities work and which don’t in terms of soliciting appropriate referrals.

## Keeping Track of Outreach Activities

You can track outreach by maintaining a chronological list that includes marketing presentations, who presented, and who attended. You can develop a list of attendees by passing around a sign-in sheet for name and contact information. If there are sufficient time and staff resources, developing a database, mailing list, or email list also is helpful. You can use this information to prepare mass mailings or email blasts of brochures, newsletters, or other materials to keep stakeholders updated about services. In addition, you should collect and track data on how beneficiaries hear about the program or who referred them.

## Tracking Referral Sources and Checking Penetration of Populations

WIPA Project Managers should track details that determine which stakeholder groups generate the most high-priority referrals. It's simple — during the initial call ask beneficiaries who referred them, and keep track of this information. Tracking referral sources also helps determine which tend to misunderstand the objective of the WIPA project. Agencies that repeatedly refer ineligible or low-priority individuals need more education. Tracking referral sources helps managers know when agencies need another outreach or education session.

Referral source data will also indicate which population groups you are successfully reaching and which need more outreach attention. WIPA Project Managers should examine beneficiary demographics to make sure outreach efforts are penetrating each subgroup of Social Security beneficiaries with disabilities in your local service area. In some cases, projects might miss certain age groups, such as transition age youth or beneficiaries over age 60. In other cases, outreach efforts might not attract some disability groups or minority populations. All of this information has important implications in terms of outreach design and delivery. WIPA projects can't evaluate how effective outreach efforts are if they fail to collect data and review it periodically.

**NOTE:** Social Security expects WIPA projects to target outreach efforts to underserved populations such as transition-aged youth (defined as beneficiaries at least 14-25 years old), veterans, Native Americans, and other racial, ethnic, disability, and socioeconomically disadvantaged or minority populations. You need to track how well your

project is reaching these priority populations during outreach.

## **Refining Strategies to Increase Priority Referrals**

When reviewing outreach results, keep in mind that maintaining the same approach often means getting the same results. CWICs need to change their outreach strategies to attract beneficiaries that they haven't attracted in the past. Take a critical look at the groups you are presenting to and how you contact them. What approaches might work best with underrepresented groups? Talk to your WIPA team, brainstorm techniques, and ask stakeholders for advice on contact methods. Outreach strategies need to constantly evolve to keep targeted audiences engaged and interested.

## **Accommodating Disability and Cultural or Ethnic Differences when Conducting Outreach**

WIPA services are available to all eligible high-priority beneficiaries regardless of disability, ethnicity, gender, race, age, or any other characteristics. Unit 4 of Module 7 covers this important issue. You should read this unit before conducting outreach in the community to ensure all participants benefit from outreach activities. Here are a few tips to keep in mind when designing outreach activities for all potential participants:

- Choose locations that are physically accessible to all beneficiaries, regardless of disability.
- Bring materials or handouts in a variety of formats including large print, Braille, and on CD.
- Arrange for a certified sign language interpreter to attend, if needed. Make sure attendees know how to alert the project if an interpreter is necessary.
- Include foreign language interpreters when conducting outreach activities in areas with high concentrations of persons who speak a foreign language. Offer outreach meetings in a variety of locations and at a variety of times to accommodate transportation needs and work schedules.
- Choose locations accessible by public transportation, because many beneficiaries don't drive.

- Offer free or low-cost childcare to increase family attendance.

## Conclusion

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As a CWIC, you are part of a larger team of people dedicated to improving employment outcomes for people with disabilities. You have an important role to play on this team, but can't play it in isolation. Conducting outreach to disability services organizations and other community stakeholders is the critical first step to joining the "team" for each beneficiary served. When community agencies that support people with disabilities in achieving their employment goals know about and utilize WIPA services, the entire team functions more efficiently and achieves better outcomes. WIPA projects must make an ongoing effort to spread the word about the availability and importance of WIPA services. You must make sure your partner agencies understand the services you provide and whom the program serves. It's only by mutual understanding, cooperation, and collaboration that Social Security beneficiaries with disabilities will reach the shared goal of employment.

## Conducting Independent Research

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A variety of approved **sample WIPA outreach presentations and materials is available at VCU NTDC's website** here:

(<https://vcu-ntdc.org/resources/resourceDetail.cfm?id=7>)

# Competency Unit 2 – Collaborating with the Ticket Program Manager and Ticket to Work Help Line to Conduct Outreach

## Introduction

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Social Security conducts significant outreach for its work incentives programs through its Ticket Program Manager (TPM) contractor. Because Social Security limits the amount of time WIPA projects are permitted to conduct direct outreach, it's critical for CWICs to collaborate with the TPM.

## Ticket Program Manager Overview

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In September 2015, Social Security awarded MAXIMUS Federal Services a five-year contract to serve as the Ticket Program Manager (TPM). Previously, two separate entities were responsible for different aspects of the Ticket Program. Under the current contract, the TPM is responsible for providing support for beneficiaries to encourage and facilitate participation in the Ticket Program. It also provides a wide variety of employment network (EN) support services to meet the objectives of the Ticket Program.

### **TPM responsibilities include:**

- Conducting outreach to beneficiaries: The TPM is responsible for designing, implementing, and managing an ongoing, nationwide effort targeted at to Ticket-eligible beneficiaries and other program stakeholders to educate them on the benefits of participating in the Ticket program and employment opportunities through Section 503;
- Ensuring timely and accurate communication with beneficiaries: The TPM assists Social Security by operating the Ticket to Work Help Line, which is staffed by Customer Service Representatives

(CSRs) who are specially trained and certified by the VCU National Training and Data Center (NTDC) to answer beneficiaries' questions. The TPM also manages the **Ticket to Work website** ([www.choosework.ssa.gov](http://www.choosework.ssa.gov)) that provides program-related information and a platform for beneficiaries to post and read comments about the Ticket program;

- Facilitating beneficiary access to ENs: The TPM assists Social Security in developing and executing strategies to enable Ticket-eligible beneficiaries to connect with service providers who are capable and willing to serve them;
- Recruiting experienced and highly-qualified ENs;
- Assisting Social Security in facilitating and monitoring active EN participation in the Ticket Program;
- Facilitating Ticket assignment and EN payment processes;
- Assisting Social Security to ensure the quality and integrity of EN Ticket services; and
- Coordinating and merging all beneficiary and EN marketing, outreach, training, support, and performance monitoring.

## **Beneficiary Support and Outreach Functions of the TPM**

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### **Ticket to Work Help Line**

For general questions or guidance specific to a beneficiary's situation, beneficiaries can call the Ticket to Work Help Line at 1-866-968-7842 (V) / 866-833-2967 Text Telephone (TTY), Monday through Friday from 8 a.m. - 8 p.m. Eastern Time (excluding federal holidays).

The Ticket to Work Help Line handles approximately 200,000 calls a year from beneficiaries who hear about the Help Line from Social Security websites and publications, Ticket program marketing materials, webinars, and social media. Customer Service Representatives (CSRs) provide information about the Ticket program, confirm beneficiary eligibility, and respond to specific questions. Help Line CSRs also offer callers a list of service providers in their area that includes ENs, State Vocational Rehabilitation (VR) agencies, WIPA projects, and Protection and Advocacy

for Beneficiaries of Social Security (PABSS) agencies. Representatives offer to send this listing by mail or email, but they also direct callers to the Choose Work website, where callers can create and print their own list. CSRs mail more than 4,000 lists every month. CSRs also assess the beneficiary's readiness to move forward on the road to employment, introduce the caller to the availability and value of benefits counseling, and, if appropriate, facilitate a referral to a WIPA project.

## **WISE Webinar Series and Online Tutorials**

Work Incentive Seminar Events (WISE) webinars are live, free, and accessible online events for those interested in learning about Ticket to Work, work incentives, and other topics related to disability employment. WISE webinars are designed to encourage beneficiaries of Social Security's disability benefit programs to explore their work options, join the workforce, and achieve greater financial independence while reducing or eliminating their need for SSDI or SSI cash payments.

On these webinars, employment service providers including WIPA projects, State VR agencies, PABSS, and ENs discuss their services. Ticket to Work program participants who gained employment through the Ticket to Work also offer first-hand accounts of their success.

WISE events take place via free Internet-based webinars. Some of the webinars address general program and work incentives information; others are specific to people in select disability categories or age ranges, or with special interests. Past webinar topics have included:

- Ticket to Work and Employment Supports for Veterans;
- Healthcare and the Path to Employment;
- Ticket to Work's Resume and Interview Tips;
- Reasonable Accommodations and the Path to Employment;
- Ticket to Work and the Path to Employment;
- Working With a Mental Illness;
- How to Help Your Clients and the People You Serve;
- Achieving Financial Independence with the Ticket to Work and an ABLE Account;

- Debunking the Three Biggest Myths About Disability Benefits and Work; and
- Setting Goals with Ticket to Work.

The webinar-based format allows beneficiaries to learn about employment resources without having to travel. In addition, beneficiaries can access the archived webinars online at their convenience. WISE webinars typically occur once per month. Beneficiaries can **register for webinars on Ticket to Work's website** (<https://choosework.ssa.gov/wise/>). The most recent **archived webinars are available at Ticket to Work's website** (<https://choosework.ssa.gov/webinars-tutorials/webinar-archives/index.html>).

To complement WISE webinars, a series of online, self-paced tutorials are also available. No matter where beneficiaries stand on the employment continuum, these six interactive learning modules equip them with the knowledge they need to achieve their work goals. **The tutorials are available online at choosework.ssa.gov under training** (<https://choosework.ssa.gov/training/>).

## **Additional Resources**

The TPM provides resources to WIPA projects and other stakeholders, including:

- **Choosework.ssa.gov:** This beneficiary-focused website includes Ticket information, the Find Help tool, the webinar registration system, a document library, the Choose Work blog, and multimedia including video and print success stories and the Ticket Talk podcasts. The Find Help tool is the most used portion of the website. It allows visitors to search for service providers that serve their zip code. It can filter results by disabilities, languages, services, or distance. In addition, a guided search function asks visitors a series of questions about their goals and work history, then provides a list of recommended service providers.
- **Service provider resources:** This comprehensive collection of Ticket to Work outreach materials and tools includes success stories, customizable fliers, posters, wallet cards, and website banners ( <https://yourtickettowork.ssa.gov/resources/service-provider-outreach-toolkit.html>).

- **Social media:** The TPM manages several Ticket program social media accounts including Facebook, Twitter, YouTube, and the Choose Work Blog ([www.choosework.ssa.gov](http://www.choosework.ssa.gov)).
- Through these channels, the team responds to Ticket to Work inquiries, encourages beneficiaries to register for WISE webinars, conducts Facebook Q&A sessions and Twitter chats, and attracts other organizations to promote awareness of the Ticket program.
  - **Facebook:** <http://www.facebook.com/choosework>
  - **Twitter:** <http://www.twitter.com/chooseworkssa>
  - **YouTube Channel:**  
<http://www.youtube.com/user/choosework>
  - **Blog:** <https://choosework.ssa.gov/blog/index.html>

## **Working With the Ticket to Work Help Line**

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The Ticket to Work Help Line is often the beneficiary's first point of contact in his or her return to work efforts. The Help Line has the same mission as WIPA projects:

- Promote employment, and
- Help beneficiaries to achieve financial independence.

WIPA projects and the Help Line are partners on the same team and must work together in assisting beneficiaries to achieve their employment and financial independence goals.

### **Role of the Help Line**

The Help Line is a critical referral source for WIPA projects. Initially, Help Line services focused solely on helping beneficiaries make informed choices about using their Tickets and selecting an EN or state VR agency. Beginning in 2009, Social Security expanded the role of the Help Line by establishing a special cadre of Customer Service Representatives (CSRs) specifically trained and certified to provide basic work incentives information to callers. Today, the Help Line functions as an intermediary service that screens referrals to WIPA projects. To ensure appropriate beneficiary referrals, CSRs:

- Identify callers who are working, have job offers, or are interviewing for jobs;
- Provide basic information to help beneficiaries understand the SSI and SSDI programs, Social Security's work incentives, and the effects of earnings from work on cash benefits and health care coverage, including Medicare and Medicaid;
- Provide referrals to the appropriate WIPA project via secure encrypted email;
- Encourage the pursuit of work to callers who haven't yet decided to work or are preparing for a job search; and
- Provide alternative referrals for non-WIPA services, such as PABSS (Protection and Advocacy for Beneficiaries of Social Security) projects and other organizations responsible for local or state benefits programs and resources, as appropriate.

Prior to making a referral to the WIPA projects, Help Line CSRs screen all beneficiaries with inquiries about work incentives to determine whether:

- The beneficiary meets the eligibility criteria for WIPA services;
- The beneficiary is working or is actively conducting a job search; and
- The beneficiary needs or is interested in receiving WIPA services.

As part of the screening and referral process, Help Line CSRs also:

- Collect demographic information; and
- Record information on Ticket status, employment status, the beneficiary's county of residence, and other expressed concerns.

When it's determined that a beneficiary is (1) eligible for WIPA services, (2) working, considering a job offer, or interviewing for jobs, and (3) has a desire for more intensive, individualized services, the CSR generates a referral to the WIPA project serving the beneficiary's place of residence. The Help Line CSR provides information to the beneficiary about the protection and use of personally identifying information (PII) that he or she will share with the WIPA project in the referral process and obtains the beneficiary's consent prior to sending this information via encrypted email.

## **Help Line Services to Transition-Aged Youth**

Beneficiaries receiving services from the Help Line must be eligible for the Ticket to Work program, which requires an adult determination of disability. Due to this requirement, the Help Line may not serve callers ages 14-17, including parents who call on a child's behalf. With Social Security's emphasis on outreach to transition-aged youth, there is concern that youth in transition or SSI youth might contact the Help Line and become discouraged by a lack of assistance. To respond to this need, Social Security allows the Help Line to refer young beneficiaries or their representatives directly to WIPA projects through the encrypted email referral process.

**NOTE:** Social Security defines transition age youth as those beneficiaries between ages 14 and 25. Although youth between 18 and 25 are Ticket-eligible, they are still considered under the transition youth umbrella and are expedited as referrals to WIPA projects no matter how close they are to work.

These referrals are somewhat different from traditional referrals because the Help Line does not provide the same level of triage or Information and Referral (I&R) services to youth that it provides to adults. Instead, CSRs provide brief information about the WIPA program to those interested in WIPA services, regardless of where the beneficiary is on the employment continuum, and refer callers to the local WIPA project. Referrals contain contact information for the young beneficiaries and their guardian or representative payee. The WIPA staff receiving the referral must review and assign the referral, and then begin attempts to contact the youth, parent, or payee as soon as possible to begin services. During that initial contact, CWICs evaluate the beneficiary's need for I&R services and the appropriateness of WIPA services. Transition age youth between ages 14 and 25 are a high priority for WIPA services no matter where they are on the employment continuum.

## **CWIC Interaction with the Help Line**

Because of the close working relationship between the Ticket to Work Help Line and WIPA projects, CWICs occasionally interact directly with Help Line CSRs either via email or phone. CWICs must remember to protect a beneficiary's personally identifiable information (PII) when contacting the Help Line with questions about referrals. You must also

understand that if you call the Help Line directly, although they are our partners in the WIPA initiative, the CSRs can't disclose any beneficiary information directly to you. Types of interaction will vary by situation, and we will discuss the most common situations and strategies for success below.

**Clarification of referral information:** The amount of beneficiary information you receive in a referral may be limited by how much the beneficiary shared and provided permission for release. In some cases, you may try to reach out to the Help Line by replying to the referral email. If you need to ask a question about the referral, you must reply to the original referral email within the secure Cisco account. Do not simply reply to the initial referral email you received without logging into the secure system. In most cases, you don't need to contact the Help Line, because the CSRs provide everything the beneficiary permitted for release.

**Beneficiary assistance with information related to Ticket status:**

You may encounter instances when a beneficiary needs to contact the Help Line on his or her own, or via a three-way call with you. Some of the information you and the beneficiary might need includes:

- Ticket assignment or "in use" status;
- Name of provider (Employment Network/Vocational Rehabilitation) listed for Ticket assignment;
- The status of the last Timely Progress Review (TPR);
- How to unassign and reassign a Ticket; and
- How to obtain an EN list.

Provide specific information to the beneficiary about exactly what he or she needs to ask the Help Line. Give the beneficiary a list of questions to ask the Help Line. For example: If the beneficiary is unsure of his or her Ticket assignment status, you might suggest the following:

"Contact the Help Line at 866-968-7842 and ask if your ticket is currently assigned, and if so, to what agency. You should also ask them the status of your last Timely Progress Review."

Remind the beneficiary that you are the source of specific and individualized information about the effect of earnings on benefits. Prepare the beneficiary to let the Help Line CSR know he or she is already

connected with a CWIC if the CSR begins providing general work incentives information. Another alternative is to initiate a three-way call with the beneficiary and the Help Line to assist the beneficiary in gathering necessary information. You shouldn't be directing the conversation. Your role is to provide support and clarification as needed. The Help Line can't provide this information to you without the beneficiary being present. The Help Line isn't able to receive or respond to signed releases of information faxed from CWICs regarding the Ticket status of a beneficiary.

## **Conclusion**

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The Ticket Program Manager provides invaluable avenues of outreach to beneficiaries in a variety of modalities. Collaborating with the TPM on outreach efforts and working closely with the Ticket to Work Help Line will allow you to focus your energies on providing high quality, individualized services to beneficiaries as they pursue employment and financial independence goals. Remember that the Ticket Program and the WIPA Initiative are partners in Social Security's efforts to assist individuals with disabilities to return to work and realize their goals and dreams.

## **Conducting Independent Research**

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A wide variety of resources is available at the following Ticket to Work websites:

- **Ticket to Work Resources** (<https://yourtickettowork.ssa.gov/resources/index.html>)
- **Ticket to Work website** (<https://choosework.ssa.gov/>)



# Competency Unit 3 – Collaborating with Other Key Stakeholders to Promote Employment of Social Security Beneficiaries with Disabilities

## Introduction

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WIPA projects are encouraged to develop collaborative working relationships with other community agencies and make direct referrals to community agencies for needed services. CWICs are expected to assume an active role in helping beneficiaries plan for employment and access the services and supports needed to make employment possible. This emphasis on employment outcomes requires understanding the array of employment services and resources in your community and strong working relationships with these agencies to support the work goals of beneficiaries. Taking time to build these partnerships can make your job much more manageable. Collaborating with partner agencies allows you to concentrate on your area of expertise, knowing other partners are assuming responsibility for assisting the beneficiary in other areas related to employment.

At a minimum, the agencies you need to form partnerships with include:

- Social Security Administration (Social Security)
- State Vocational Rehabilitation Agencies (SVRAs)
- Employment Networks (ENs) under the Ticket to Work Program
- State or Regional Workforce Investment Boards (WIBs) and local American Job Centers (AJCs)
- State/local intellectual disability/developmental disability agencies
- State/local mental health/chemical dependency/ substance abuse agencies

- Centers for Independent Living (CILs)
- State Protection and Advocacy Agencies (P&A)
- Public school systems
- Individual Development Account (IDA)/Asset Development Programs
- U.S. Department of Veterans Affairs (VA) and other agencies serving veterans with disabilities

Building and maintaining strong working partnerships with local agencies will provide you with opportunities to work as part of an interdisciplinary team.

This collaboration includes:

- Communicating directly with multiple agencies or organizations to build a more comprehensive understanding of their missions, eligibility rules, policies and procedures, and services and supports.
- Educating the employment service or support community on the role of WIPA services in supporting the employment efforts of beneficiaries.
- Identifying, developing, and implementing formalized strategies and processes for joint employment and work incentive or support planning for beneficiaries.
- Implementing strategies to build general knowledge of how employment affects federal, state, and local benefits and how to incorporate work incentives into existing vocational planning, job development, and employment support efforts.

This unit provides specific recommendations about ways to collaborate with community partners to promote employment and enhance financial independence for Social Security beneficiaries with disabilities. Let's begin by examining how WIPA projects should work with their primary partner, the Social Security Administration.

# Working with the Social Security Administration

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Social Security employees are faced with a challenging array of tasks and functions. Most activity centers on processing initial claims so benefits can begin. This makes sense because applicants are often in dire need of the cash payments and medical insurance associated with Social Security benefits. While promoting employment might not be considered the most important function for Social Security employees, there is a growing awareness within local Social Security offices that helping beneficiaries with disabilities understand how work affects benefits is important. Social Security personnel at the national, state, and local levels understand that they need WIPA projects to help with this task.

To collaborate with Social Security, WIPA projects need to understand how the agency functions and what the various players do. The following sections provide an overview for how to work with Social Security employees to help beneficiaries achieve their employment goals.

## Organizational Structure of the Social Security Administration

Social Security is a large federal agency with more than 60,000 employees nationwide. The central office is in Baltimore, Maryland and has authority over all other offices in the Social Security system. Ten regional offices report to Baltimore. These regional offices have jurisdiction over a designated multi-state region of the country. The next level down in authority includes the 58 area directors' offices. For the most part, an area office corresponds to a state. For very populous states like California, New York, or Florida, there is more than one area office. Area, regional and central offices are part of the administrative structure of the Social Security. Personnel in these offices don't provide services to beneficiaries directly.

For information about the 10 regional offices, go to the websites for each region listed below.

- **Region 1:** Boston office (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont)  
<http://www.ssa.gov/boston>

- **Region 2:** New York office (New Jersey, New York, the Commonwealth of Puerto Rico, the U.S. Virgin Islands)  
<http://www.ssa.gov/ny>
- **Region 3:** Philadelphia office (Delaware, District of Columbia , Maryland, Pennsylvania, Virginia, West Virginia)  
<http://www.ssa.gov/phila>
- **Region 4:** Atlanta office (Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee)  
<http://www.ssa.gov/atlanta/southeast/index.htm>
- **Region 5:** Chicago office (Illinois, Indiana, Michigan, Minnesota, Ohio, Wisconsin) <http://www.ssa.gov/chicago>
- **Region 6:** Dallas office (Arkansas, Louisiana, New Mexico, Oklahoma, Texas) <http://www.ssa.gov/dallas>
- **Region 7:** Kansas City office (Iowa, Nebraska, Kansas, Missouri) <http://www.ssa.gov/kc>
- **Region 8:** Denver office (Colorado, Montana, North Dakota, South Dakota, Utah, Wyoming) <http://www.ssa.gov/denver>
- **Region 9:** San Francisco office (Arizona, California, Hawaii, Nevada, American Samoa, Guam, Saipan)  
<http://www.ssa.gov/sf>
- **Region 10:** Seattle office (Alaska, Idaho, Oregon, Washington)  
<http://www.ssa.gov/seattle>

Area directors' offices are the level just above the local Social Security offices in communities nationwide. Local Social Security offices are called "district offices" (DO) or "field offices" (FO). These local offices form the "face" of Social Security. This is where the public goes to apply for benefits, report work, or otherwise get help from Social Security in person. There are more than 1,400 field offices across the country. The local office bears the lion's share of responsibility for interviewing applicants and beneficiaries, processing initial claims, and making individual decisions about benefits and payments.

In addition to decision-makers in the local field offices, the six processing centers and the 130 hearing offices make some decisions. Obviously, there is a complex chain of command within Social Security with many different units performing various functions.

## **Understanding the Roles of Social Security Field Office Personnel**

CWICs encounter many different types of Social Security employees in their day-to-day work. The more you understand the responsibilities of each position, the easier it will be for you to work effectively with these critical partners. As you begin to work with local field offices, you will encounter two additional types of Social Security employees who are on the front line in delivering service to beneficiaries and applicants: Service Representatives (SRs) and Claims Specialists (CSs). Let's take a look at the duties for each position.

### **Service Representatives**

In most field offices, the first Social Security employee a beneficiary or applicant has contact with is a Service Representative. These positions provide a wide range of general assistance to the public. Service Representatives answer questions about all Social Security benefits, SSI, and Medicare and are responsible for explaining program rules in a way the public can understand. Service Representatives also interview beneficiaries and claimants and assist with gathering the information necessary to adjudicate benefit claims or resolve problems with benefits. This position has the most contact with the public in the agency and requires excellent communication skills. When a claimant or beneficiary presents an issue the Service Representative can't resolve, a Claims Specialist typically provides assistance.

### **Claims Specialists**

This is the keystone position through which Social Security achieves its major operating objective of bringing direct personal service to the public. Duties performed by Claims Specialists (CSs) are expansive and include (but aren't limited to) the following:

- Conducting interviews to obtain, clarify, and verify information about individual applicants' initial and continuing eligibility for retirement, survivors, disability, black lung, health insurance benefits, and eligibility for supplemental security income payments, including state supplements where required;
- Examining evidence to evaluate its validity and acceptability in establishing entitlement to benefits, and, when necessary, taking the required developmental action to ensure all available relevant evidence has been obtained. CSs also assist applicants

- in securing evidence, and prepare special determinations of fact to resolve evidentiary discrepancies;
- Authorizing payment claims for benefits and eligibility to all programs administered by Social Security. CSs also have authority to disallow a full range of SSI and Title II benefit claims.
  - Conducting interviews, developing, investigating, and resolving post-entitlement actions, including SSI redeterminations, which may involve suspension, resumption, or termination of eligibility or payments;
  - Assisting claimants in filing for administrative appeals in matters concerning entitlement to benefits or coverage under the various programs;
  - Conducting case reviews, informal and formal conferences to reconsider initial decisions and post-eligibility decisions affecting a claimant's eligibility, continuing eligibility, or amount of payment under the supplemental security income program, and making final decisions on nonmedical issues in SSI reconsiderations;
  - Determining if applicants for or recipients of disability insurance benefits and disability payments under the SSI program are engaging in substantial gainful activity;
  - Recognizing the need for and approving the selection of representative payees for individuals unable to handle his or her own benefits;
  - Protecting the integrity of Social Security programs through identification, investigation, and resolution of potential program abuse situations;
  - Providing referral services to beneficiaries needing the services of other programs or organizations,
  - Protecting the rights of beneficiaries by assuring that claimants or their personal representative understand the claimant's legal rights and obligations under the Act and its relationship to other social welfare and benefit programs;

- Developing, investigating, and resolving discrepancies in earnings and determining amounts to be posted or deleted from individual records; and
- Determining whether income is wages or self-employment income and whether it's covered income under the Social Security Act.

For more information about positions within the Social Security Administration, go to [ssa.gov Job Position Summary](http://www.socialsecurity.gov/kc/jobs_position.htm) ([http://www.socialsecurity.gov/kc/jobs\\_position.htm](http://www.socialsecurity.gov/kc/jobs_position.htm)).

## **Social Security Employees with Specific Work Incentives Duties**

In addition to Service Representatives and Claims Specialists, two types of Social Security employees have very specific duties related to work incentives: Work Incentives Liaisons (WILs) and Area Work Incentives Coordinators (AWICs). CWICs work very closely with these employees and should have a general understanding of their job functions.

### **Work Incentives Liaisons (WILs)**

Some Claims Specialists (CSs) act as the designated Work Incentive Liaison (WIL) in addition to their regular CR duties. These aren't separate positions. The WIL designation represents additional work requirements for Social Security employees selected to serve in this capacity. The WIL is a special designation given to a Social Security employee, most typically a Technical Expert (TE) or Management Staff Support (MSS) with expertise in the disability programs and associated work incentives. The WIL acts as an internal resource for other Social Security personnel on work incentives issues within that local office. The WIL is the go-to person in the local Social Security office for all questions about how earned income from wage employment or self-employment affects benefits. When Claims Specialists and Service Representatives have questions about how to apply the disability program work incentives, their first resource is the WIL. These individuals are also the primary contacts on work incentives issues for WIPA programs.

**NOTE:** Different field offices deploy the WIL in different ways. Communicate with the manager of each field office in your service area to find out what roles the WIL plays and

how the manager expects you to work with the WIL. Never assume you know how to interact with the WIL — ask!

### **Area Work Incentive Coordinators (AWICs)**

These employees coordinate with WILs in local field offices to provide improved services and information on Social Security's employment support programs, which are structured to assist beneficiaries with disabilities who want to start or continue working. AWICs are experienced employment support experts who:

- Coordinate and conduct public outreach on work incentives in their local areas;
- Provide, coordinate, and oversee training on Social Security's employment support programs for all personnel at local Social Security offices;
- Handle sensitive or high-profile disability work-issue cases, if necessary; and
- Monitor the disability work-issue workloads in their respective areas.

**NOTE:** You can find the **AWIC for each federal region at Social Security's website**

(<http://www.socialsecurity.gov/org/dco.htm#sb=2>). The websites for the ten (10) Social Security federal regions are organized differently. For example, if you click on the link and go to the Boston, Atlanta, San Francisco, and Seattle regions, the AWIC is listed on the left side of the page. For the New York region, you have to click on "Work Incentive Network," then "Local WIN coordinators." For the Philadelphia region, the link is labeled as "Contacts for Disability Employment Support Programs." For the Chicago region, the link is "Employment Supports," for the Dallas region it's "Return to Work," and finally, for the Kansas and Denver regions, AWICs are listed under the label "Work Incentives."

## Establishing Positive Relationships with Local Social Security Offices — Strategies for Success

You mustn't assume that local Social Security personnel know what services WIPA projects provide or who is eligible for WIPA services. Like all other partner agencies, local Social Security personnel need to be introduced to CWICs and educated about WIPA services. Take the following steps to start these relationships off on the right foot:

- **Set up an initial meeting with the manager of each of the local offices that your project serves.** This is the time for the WIPA Project Manager to introduce the program to the field office manager and to ask about preferences for contacting the staff. This is also an appropriate time to ask if CWICs can attend the next Field Office staff meeting to introduce themselves and convey the project's objectives. Another helpful tip at this meeting is to request the name of the WIL, Title II post-entitlement CRs, and a list of SSI CRs by their caseload designation (many offices split the SSI caseload by alphabet or digits in the SSN). In addition, inform the manager that the project is eager to work collaboratively with the local office to help make beneficiaries' return to work efforts a smoother transition for all involved.
- **Conduct a brief presentation about the WIPA project to the field office staff.** Introduce the CWICs who will interact with the local office and explain how the project is conducting business. Ask the local office staff for their input on collaborative efforts and suggestions. The local Social Security staff can be a valuable referral source. The **[VCU NTDC website](https://vcu-ntdc.org/resources/viewContent.cfm?contentID=194) contains a pre-approved PowerPoint presentation WIPA personnel should use** when describing the WIPA program to Social security employees and other stakeholders (<https://vcu-ntdc.org/resources/viewContent.cfm?contentID=194>).
- **Maintain regular contact with the office — know the players!** Your role isn't only to support beneficiaries in their return to work efforts, but also to help them communicate with Social Security more effectively. Open communication creates a "win-win" situation for everyone.

- **Collaborate on presentations with the AWIC and Public Affairs Specialist.** Collaboration on outreach enhances the WIPA project's reputation and will increase referrals. It's important for other community providers to see that CWICs and Social Security present a united front to assist beneficiaries.
- **Get acquainted with the WIL and any assigned backup contact person.** This is the primary point of contact for CWICs. Be clear about the role of the WIL in each field office and know how each WIL wants to communicate with you
- **Know who the post-entitlement person is in each office.** This is another key relationship for you to cultivate. The post-entitlement person processes work-related Continuing Disability Reviews (CDRs) and is the go-to person for beneficiary issues related to reporting work activity.

## **Working Collaboratively with Local Social Security Offices to Promote Employment and Enhance Financial Stability**

WIPA projects and Social Security field offices partner in numerous ways. Relationships with local Social Security personnel should be reciprocal. Cultivating a strong working relationship with the local office benefits the WIPA program, Social Security, and the beneficiaries they both serve. Visualize all these players as cooks in a kitchen, working together to make a pot of soup. Each cook will have a different perspective on the recipe and thus contribute different ingredients to make the soup. All of the inputs and viewpoints of the partners must combine to create the best possible outcome. You must remember that you can't be everything to all beneficiaries. Social Security must be an active partner in the provision of services.

In any true partnership, there is a give and take. Maintaining a strong alliance with local Social Security offices makes everyone's job easier. Let's take a closer look at exactly how that happens.

### **How CWICs Assist Social Security Personnel**

- CWICs can teach beneficiaries what information they need to report and how to report information correctly. By helping beneficiaries report wages and work incentives information

correctly, you save Social Security employees time and effort in resolving mistakes and dealing with overpayments.

- You can provide tremendous assistance to Social Security CSs by helping Title II disability beneficiaries develop their work histories and track usage of their own work incentives.
- You can serve as interpreters for beneficiaries when they receive correspondence or attend appointments at the Social Security office. While Social Security employees are trained to work with people who might have disabilities that impede communication or limit understanding of complex information, you can still help facilitate effective communication between the beneficiary and CS. In most cases, you'll have worked with the beneficiary for some period of time and may have a close, trusting relationship with him or her. Helping with communication is a tangible way you can support Social Security personnel.
- Explaining how various work incentives apply is time-consuming. You can help beneficiaries understand and apply these provisions correctly the first time, which saves the CS a great deal of work. This can be of particular use during a Substantial Gainful Activity (SGA) determination. When you help the beneficiary develop all the work incentives and present them in an organized fashion to the CS, SGA determinations become a much simpler task.
- Many beneficiaries struggle with developing Plans to Achieve Self-Support (PASS). When you help facilitate this process, it aids the PASS Specialist and reduces the amount of time it takes for Social Security to approve the PASS. In addition, having a CWIC to talk to about the PASS helps facilitate changes and makes sure transitions go smoothly.

### **How Social Security Personnel Assist CWICs**

- One of the most important ways Social Security employees can help you is to provide prompt access to Benefits Planning Queries (BPOQs) for verification of benefits. This report is essential because it precedes any individual counseling. The faster Social Security can provide this report to the beneficiary or to you, the faster you can begin services!
- The CS can also help by correcting issues in the BPOQ such as undeveloped earnings, work incentives usage, etc. In some local

field offices, the WIL is a central point of contact to help resolve problems identified on BPOQs.

- Although you can help identify work incentives and facilitate their development, only the CS can enter this information into the Social Security computer system to adjust SSI payments, or use the information to conduct SGA determinations. When Social Security personnel promptly act on the information you supplied, they can avoid overpayments or underpayments.
- PASS Specialists can be essential to beneficiaries when it comes to explaining the PASS rules and requirements, especially if Social Security rejects a PASS or requests significant changes. PASS Specialists can also alert you to potential problems that you can help resolve. **For PASS Cadre contact information can be found online at [socialsecurity.gov](http://www.socialsecurity.gov)** (<http://www.socialsecurity.gov/disabilityresearch/wi/passcadre.htm>).
- AWICs can provide valuable support to WIPA programs by working with local Social Security offices on applying various work incentives correctly, and responding to BPOQ requests in a timely fashion. You need to let AWICs know about problems so that training and technical assistance can correct them.

**Collaboration Example:** You receive a call from the WIL at the local Social Security office referring a beneficiary for WIPA services, named Bill Beneficiary. Bill came into the local office asking for assistance with funding for training so that he could learn new job skills and eventually become self-supporting. The WIL felt that he might be a good candidate for a PASS plan. As you gather information and verify benefits, you discover that Bill has worked since becoming entitled to SSDI and hasn't reported this to Social Security. Based on Bill's pursuit of employment training and interest in receiving WIPA services, you enroll Bill in the WIPA services and develop a Benefits Summary & Analysis (BS&A) report so that he is able to make an informed choice about pursuing the PASS. After reviewing the BS&A, you assist Bill in developing a Work Incentives Plan (WIP). While you are helping him develop the PASS plan, you are in contact with the regional PASS Cadre to

ensure that the PASS contains all of the information the specialist will need. Meanwhile, you are working with Bill and the Claims Specialist at the local Social Security office to properly report wages and complete a Work Activity Report, as well as completing an SSI application (part of the PASS requirement).

### **Common Questions CWICs have about Working with Social Security Field Offices**

Social Security employees have a great many responsibilities and multiple demands on their time and attention. Unless you have introduced yourself to the local FO staff, it's quite possible that these personnel will be unaware of the WIPA program and unfamiliar with the services it provides. Take the time to conduct formal introductory meetings with each FO in the service area. These meetings shouldn't just occur once, as Social Security experiences staff turnover just like all employers. There will always be new employees who aren't aware of the WIPA program.

CWICs sometimes struggle with understanding the strict confidentiality requirements to which Social Security adheres. When you are working with beneficiaries, there is no "automatic" sharing of information between WIPA projects and Social Security. In order for Social Security to release ANY information about a beneficiary to you, the beneficiary must sign the appropriate release forms and send them to the Social Security staff person. WIPA projects are required to use the **approved Social Security release of information form (SSA Form 3288 – Consent for Release of Information)** when requesting information about a beneficiary (<http://www.ssa.gov/forms/ssa-3288.pdf>).

In summary, you should remember that Social Security personnel are your partners in serving beneficiaries. While the roles of the two organizations are very different, both parties share the goal of helping beneficiaries become successfully employed. To the extent that you provide assistance to the local Social Security office, the employees in that office will be more likely to cooperate and help. This cooperation will save valuable time and energy when assisting beneficiaries with Social Security work incentives.

# Collaborating with Agencies Providing Employment Services and Support

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Because the focus of WIPA services is promoting employment, you must collaborate with a variety of other agencies involved in providing employment services and supports. You are just one member of the team of professionals who form the individual's "employment support team." Each of the partners is working to achieve one common goal — enhancing an individual's financial stability through successful employment. No single entity can achieve that goal alone; it requires continuous cooperative effort. Each member of the interdisciplinary team has a unique role to play. This is a symbiotic relationship, the advantage being that each team member's workload becomes lighter by working together as a group.

## The Employment Support Team

Every beneficiary will have a different team of people involved in his or her return-to-work effort. Each individual will come to the WIPA project with a unique mix of agency support or assistance. Occasionally, you will encounter individuals who literally have no external support. In these instances, you need to work with the beneficiary to determine if he or she needs employment services and if so, which agency would best meet the presenting need. The most common agencies represented on a beneficiary's employment support team would include the following:

- American Job Centers (AJCs)
- State Vocational Rehabilitation (VR) Agencies
- Employment Networks (ENs)
- Public Schools
- Centers for Independent Living (CILs)
- Community Rehabilitation Providers
- Private Rehabilitation Companies
- Agencies serving veterans with disabilities including the VA

Each of the above entities provides different types of services to beneficiaries seeking employment. You will find a complete description of each major stakeholder agency in Unit 3 of Module 1. At times, it may

seem that the various partners working with a beneficiary are duplicating or overlapping services, but this is seldom the case. Every member of the employment support team brings his or her unique perspective to the table to reach that one common goal — successful employment. The members of an individual's employment support team may change as the beneficiary meets his or her goals in the plan. Each beneficiary will have an individualized lineup of players on his or her team.

### **How CWICs Assist Other Partners on the Employment Support Team**

- CWICs offer in-depth knowledge about Social Security's work incentives and employment initiatives to their partners on the employment support team. Not only do you educate beneficiaries on the available work incentives, but you also educate provider agency staff. Community partners have a need for this information for a variety of reasons. The primary one is dispelling fears of employment caused by misinformation about the effect of earnings to benefits.
- You can also educate community partners on program eligibility criteria and scope of services. This will enhance the number of eligible and high priority referrals you receive.
- One of the most important ways that you can assist other partners is by providing thorough analysis of an individual's benefits situation and identifying critical transition points at which benefits might change. Obtaining the job is only the first hurdle that a beneficiary will encounter. Once the beneficiary gets a job, the tendency is for the beneficiary and other partners to forget about what happens down the road. You can be instrumental in guiding the journey so that bumps in the road are anticipated and planned for in advance.
- There are so many pieces to an individual's benefit puzzle that it can be difficult for beneficiaries to navigate. They often rely on their employment support team to lead the way. You have access to knowledge and resources to provide information on other federal and state benefit programs that interact and are affected by employment, such as Medicaid, food stamps, housing, etc.

- You can assist in development of previous work that may affect future work and benefits. Many times beneficiaries don't have a clear recollection of their prior work activity. Access to the information on the BPOQY can help trigger the beneficiary's memory when developing a resume or completing applications.
- You have access to a wide variety of community resources and can act as a link between agencies to provide referrals for additional services that the beneficiary may need.
- You can help other partners meet their agency goals in relation to placements. Every agency that provides some type of employment service has measurable goals that determine the success of the project. You can have a positive effect on those agency goals by providing information to both beneficiaries and providers. Knowledge of the work incentives encourages beneficiaries to work, which increases the number of successful placements the provider agencies achieve.

### **How Other Partners Assist CWICs**

- Other partner agencies can help you by providing eligible, high-priority WIPA referrals. This can help limit the initial screening process to determine eligibility which saves you valuable time.
- The beneficiary, with the assistance of the CWIC, largely directs the Work Incentive Plan (WIP). You can delegate tasks in the WIP to other members of the employment support team. This will lighten your load and allow you more time to work with other eligible beneficiaries.
- Other partners also have access to information and services that may be outside of your area of expertise. Employment support team members are active advisors in the employment process and can help connect beneficiaries to other necessary services.
- Education and information from other partners about their scope of services and eligibility criteria is invaluable for you. Not only can this enhance services they provided to beneficiaries, it also allows them to be better referral sources for the partners themselves.
- Other community agencies that are part of the employment support team can provide other avenues for outreach to

beneficiaries. You are charged with reaching a wide variety of different populations. Collaborating with agencies that serve some of these specific groups can enhance the program's exposure to beneficiaries.

**Collaboration Example:** Continuing with the example of Bill Beneficiary, who was referred to the WIPA program by the local Social Security office, the PASS Specialist requests that Bill obtain a vocational evaluation to determine whether the job goal that Bill is considering will be feasible, given his aptitude and his medical condition. You discuss the various options available in your community for the vocational evaluation. You, the State VR program, and local ENs help Bill select the most appropriate option. You refer Bill to the State VR agency for an evaluation, and also to see if they can provide services that will assist Bill in his job goal.

With Bill's permission, you provide the VR counselor with a copy of the Benefits Summary & Analysis and the Work Incentives Plan that you have developed. The three of you sit down and discuss the benefits planning information, as well as the development of the PASS Plan. This information helps Bill and his VR counselor determine the best course of action in developing an Individualized Plan for Employment (IPE) with appropriate goals and supports. In return, the VR counselor provides you with a copy of the vocational evaluation. The information contained in the evaluation leads Bill to decide to change his job goal slightly, to better account for the local job market. You assist Bill in adjusting his PASS accordingly. The VR counselor is impressed with the valuable information provided by you (the CWIC), and she refers another of her consumers for benefits counseling.

### **Common Questions CWICs have about Working with Employment Support Team Members**

One of the most common misconceptions employment support team members have is that beneficiaries are only able to work part-time if they want to retain cash benefits and critical medical insurance. While this may be the case for some beneficiaries, it isn't true for everyone. Fight

this misconception at every opportunity by showing employment support team members how working more than a few hours each week can financially benefit beneficiaries. It's quite possible to work full-time and not lose full cash payments in the SSI system. Even if work causes the loss of SSI cash payments, 1619(b) extended Medicaid coverage protects the vast majority of people from losing essential Medicaid coverage. In the Title II disability program, some beneficiaries have the potential to earn far more than they receive in monthly cash payments. To hold these individuals back to part-time employment is a shame when full-time work could offer a far superior financial outcome while maintaining Medicare coverage. You should remember that an important part of your role in working with employment support team members is educating them about how work really affects Social Security disability benefits. You must continue to reiterate the "message" as described in Unit 1 of this module with employment support team members.

Another issue that CWICs have when working with employment support team members relates to helping these individuals understand the role and function of WIPA personnel. Employment services providers tend to believe that you can and should assist their clients with every issue or problem related to benefits. WIPA projects can avoid problems of this nature by educating employment support team members about the focus of these counseling services and repeatedly reiterating their limits. You should invest your time in educating employment support team members about how they can provide assistance to beneficiaries in these non-employment related matters.

Finally, CWICs sometimes get frustrated with receiving referrals on beneficiaries only after going to work has created significant problems for them. Rather than referring individuals for WIPA services early on in the process of preparing for employment, some employment services providers use the local CWIC as a damage control mechanism. Again, this is an educational issue. You need to invest time in teaching employment services providers about the importance of early intervention when it comes to benefits counseling and planning. This type of education is an ongoing process that you must repeat over and over again.

## **Collaborating with Other Community Agencies**

Social Security beneficiaries with disabilities receive services and supports from a host of community agencies beyond those that help with vocational or employment issues. In some cases, these agencies have significant influence in the lives of beneficiaries and can seriously affect return to work efforts or even the decision to pursue employment. It's not enough for you to coordinate their counseling efforts only with members of the employment support team. Many other entities need to be involved if you are to promote work and enhance financial stability. This section will examine these agencies and the various roles they play in the lives of Social Security beneficiaries with disabilities.

### **Agencies Providing Residential Services and Supports**

Beneficiaries come from all walks of life and will present all manner of support needs. While some individuals may live completely independent lives in the community with no agency involvement, others may live in small communal residences such as group homes or halfway houses, be assisted by supported apartment programs, reside in nursing homes or institutions, or even be staying in emergency shelters for individuals who are homeless. You need to work with the agencies providing residential services and supports, because these agencies typically use Social Security disability benefits to pay for some or all of the cost of residential care. If a beneficiary loses cash benefits, residential service agencies may not be able to recover the cost of the care they provide, or the beneficiary may literally have no way to pay for rent or other residential costs. The residential service providers have a significant stake in the financial status of the beneficiaries they serve. Residential agency personnel are often very concerned about the effect of paid employment on benefits and may actively discourage beneficiaries from working due to fear of benefit loss.

### **Agencies Providing Case Management Services**

Many Social Security beneficiaries served by the state/local ID/DD system or the mental health system have a designated case manager. In most cases, individuals receiving case management services will have severe disabilities that affect their decision-making ability. Case management services typically include planning for services and supports that people with disabilities need, arranging services or benefits, and coordinating the

various services or benefit components. In some cases, the case manager may act as the beneficiary's representative payee with Social Security, or the case management provider may offer professional representative payee services. In many programs, case managers are also available to provide crisis intervention or problem resolution services when difficulties arise. Case managers often work closely with the beneficiary's family or other legal guardian to plan and coordinate services. When the beneficiary has no family involvement or other support network, case managers may act as the only party responsible for insuring that the individual's service needs are met.

### **How CWICs Assist Residential Providers and Case Managers**

- You can be an excellent source of information about Social Security benefits and how work affects these benefits. You can be of tremendous assistance to residential service agencies and case managers when dealing with individuals who are already working or who want to work. You can answer questions, provide technical assistance, and offer training to help staff understand the Social Security work incentives. By providing supports of this type, you can help these professionals view work in a more positive fashion and ease fears about how paid employment will affect cash benefits, medical insurance, or Medicaid waiver eligibility.
- You can act as an intermediary between residential providers or case managers in handling problems individuals have with their Social Security benefits. Disability professionals who aren't accustomed to communicating with Social Security often don't know how to work with the local office. With just a little training and support, residential providers and case managers can learn to communicate effectively with Social Security personnel.
- Residential providers and case managers often don't know what information beneficiaries need to report to Social Security or how to report this information. You can provide specific instructions in this area to help beneficiaries avoid overpayments, underpayments, or other benefit problems.
- Use your work incentives expertise to show residential service providers and case managers how beneficiaries can increase their total available income by working. It's unfortunate that well-intentioned disability professionals sometimes discourage

beneficiaries from working out of fear that paid employment at any level will cause ineligibility for cash benefits and medical coverage. In addition, most disability professionals don't know that SSI recipients can own businesses and homes, or that Title II disability benefits aren't means-tested at all. It's unfortunate that so many Social Security beneficiaries have so few assets when they could be building wealth in allowable ways.

### **How Residential Providers and Case Managers Assist CWICs**

- Residential agency staff and case managers can help you perform much of the "legwork" surrounding benefits issues or use of work incentives. Once trained, these professionals can accompany beneficiaries to appointments at the local Social Security office as well as handle meetings with the Medicaid eligibility determinations agency, the food stamp office, or the local Housing Authority. You simply don't have the time to provide personal assistance with all of the important meetings or appointments that arise, but some beneficiaries simply can't manage these appointments by themselves. Residential providers and case managers may provide tremendous assistance in this area.
- You rely on residential staff and case managers for help with day-to-day reporting of income and managing benefits. These professionals also have regular contact with beneficiaries and are readily available to help interpret correspondence, collect documentation for work incentives, or communicate critical information to the employer or family members. You rely on these professionals to be your "eyes and ears" and to notify you whenever they need help or problems arise.
- Sometimes you will need help communicating with beneficiaries. While the residential provider or case manager may have a long-standing and trusting relationship with the beneficiary, you may have only met with or talked to the beneficiary once or twice. Case managers can help you explain the work incentives in a manner that is understandable to a beneficiary. They can also help you understand the preferences or desires of individuals who may have communication barriers.

**Collaboration Example:** As you continue to work with Bill Beneficiary and his VR counselor to access the services and supports he needs to become successfully employed, you learn that one of the goals on Bill's IPE is to work with a case manager from the local Area Mental Health agency. Bill's VR Counselor recommended case management services as part of the VR assessment process, to assist Bill with coordination of services such as counseling and medication management, as well as helping Bill to manage the array of paperwork and reports that he must complete in order to maintain benefits such as Medicaid and Food Stamps. You and Bill meet with the case manager and VR counselor to discuss how each member of the team can best assist Bill in reaching his employment goal. The Benefits Summary and Analysis you prepared helps the case manager understand how Bill can reach his employment goal while still retaining his Medicaid and his Medicare insurance necessary for him to remain medically stable. The case manager agrees to assist Bill with reporting and record-keeping responsibilities that become part of the Work Incentive Plan. After the meeting, the case manager calls you to refer another consumer that he is working with and referring to VR for assistance with obtaining a job.

## **Common Questions CWICs Have about Working with Residential Providers and Case Managers**

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As indicated, residential services providers and case managers may have tremendous influence in the lives of beneficiaries. You must remember that your primary customer is the beneficiary, not the agencies serving the beneficiary. Although the majority of residential service providers work for agencies whose stated missions are to promote independence and autonomy of their clientele, in some cases, the service provider may have preferences that aren't in alignment with what the beneficiary wants. In other cases, the service provider may not actually be working in the best interests of the beneficiary. When you encounter situations

like this, it's important to learn more about the reasons behind the actions of the service provider. There may be more to the situation than is immediately apparent. Is he or she merely following company policy or accepted practices? If so, education and networking at the agency level may help to resolve the issue. Is the issue restricted to the appointed staff member, or is the staff member acting on the wishes of involved family members? Building a strong working relationship with the agency as a whole may also help you bring the issue to the attention of appropriate staff at the agency.

You must remain strictly focused on serving the interests of the beneficiary. The counseling WIPA projects provide is intended for the beneficiary first and foremost, not other involved stakeholders. Although agency collaboration is the goal, you are required to carefully guard the confidentiality of each beneficiary. You may not share information with any external party without express written permission to do so. If you suspect that a service provider isn't working in the best interests of a beneficiary, you should seek assistance from your assigned VCU NTDC Technical Assistance Liaison. A referral to the State Protection & Advocacy Agency or Adult Protective Services Agency may be needed in the most extreme cases.

## **Working with Other Community Agencies**

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Beneficiaries may be receiving services from a wide array of programs or agencies that you may want to coordinate with for a number of reasons. In many cases, these agencies aren't providing services specifically designed for individuals with disabilities, or they may be providing disability-related services, which are more peripheral in nature than those described above. Here are a few agencies that beneficiaries will commonly be involved with whom you may want to contact:

- **Agencies providing Individual Development Accounts or IDAs:** As discussed in Unit 3 of Module 1, IDAs are asset development programs designed to help people with low income save money for things like buying a first home, paying for post-secondary education, or capitalizing a small business. Many IDA providers aren't accustomed to serving individuals with disabilities and often have questions about what participation in an IDA program will do to Social Security disability benefits,

Medicaid, and Medicare. WIPA projects can offer IDA programs training and technical assistance to relieve these fears. Most IDAs offer beneficiaries a wonderful way to save for post-secondary education, vocational training, or a self-employment goal. For beneficiaries who also may have a PASS with a self-employment goal, there are some intricacies about how IDAs and the PASS work incentive interface that you would need to clarify. CWICs and IDA providers need to work in partnership to support individuals with disabilities so they can fully benefit from participation in IDA programs.

- **Advocacy Agencies:** Some beneficiaries may be involved in peer advocacy or counseling programs operated by local Centers for Independent Living (CILs) or the National Alliance for the Mentally Ill (NAMI), or they may be getting advocacy services from the state Protection & Advocacy (P&A) agency. It's a good idea to ask beneficiaries about this involvement to see if they want you to discuss any issues with the advocate. In some cases, the advocate may be counseling the individual on employment or financial issues and may benefit from information in the Benefits Summary & Analysis (BS&A) report. Conversely, the advocate may share information that would assist you in the work incentives planning process. Consider asking the beneficiary if coordination between the WIPA project and the advocacy agency would be of assistance.
- **Disability Support Groups:** Many community agencies specialize in providing support to individuals who have certain disabilities and their family members. Some beneficiaries may be involved in the local Head Injury Association, the local Down Syndrome Association, or the Spinal Cord Injury Association. You can help these support groups by providing information about the effect of paid employment on disability benefits and disseminating information to the membership about the availability of WIPA services. In return, these groups may become more actively involved in promoting employment among their membership and may refer eligible beneficiaries for WIPA services. To begin a mutually beneficial collaborative relationship of this nature, all it takes is a phone call from you.

- **Public School Systems:** Younger Social Security beneficiaries with disabilities are often involved in special education programs or specialized services provided through the local public school system. Some schools offer community-based work experiences that may involve paid employment or even self-employment. It's important for you to work closely with special education professionals whenever they are facilitating volunteer work experience or paid work to make sure that they and the beneficiaries fully understand and utilize work incentives. You should also be informing special education teachers about all the benefit changes that may occur around the beneficiary's 18th birthday and should offer seminars to families about these changes as well as the work incentives. In return, classroom teachers can encourage students and families to consider employment at an early age. They can also be a rich source of high-priority referrals for WIPA services.
- **Collaboration Example:** After working with Bill Beneficiary for several months, he calls to ask if you would make a quick presentation about WIPA services to the local support group for the National Alliance for the Mentally Ill (NAMI). Bill has been attending this support group off and on for a number of years, and occasionally writes articles for the NAMI newsletter. He also asks if you could provide him with some information about the WIPA program for the next newsletter. After the presentation, you receive several phone calls from members of the support group. Some of the calls are requests for general information, but one caller, named Ervin, states that he is already working and needs some help understanding how to report his earnings to Social Security and to the local housing authority. He requests that the advocate he works with at the Center for Independent Living be involved in any meetings so that she will be able to assist him with any issues that may arise. The advocate has helped him to dispute an overpayment of his Social Security benefits in the past. When the three of you meet, the advocate brings the letters from Social Security regarding the past overpayment. These letters contain valuable information about the current status of Ervin's Social Security benefits. This saves you a great deal of time in developing the Benefits Summary & Analysis report. You are able to offer Ervin and his

advocate specific information on work incentives that he may be able to claim that would reduce the overpayment amount that he still owes.

## Conclusion

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WIPA services are an important component of the current national effort to promote employment for Social Security beneficiaries with disabilities, but it certainly isn't the only component, or even the most essential component in all cases. WIPA services will only be effective in achieving enhanced employment outcomes for Social Security disability beneficiaries if they are integrated with effective employment services and supports and supported by all of the other disability services systems. WIPA projects must work collaboratively as part of an interdisciplinary team that includes other key stakeholders to achieve the greatest impact. The net effect of this team effort is that each team member can concentrate on his or her area of expertise, thus making everyone's job easier, and providing the beneficiary with the best chance for a successful employment outcome.

## Conducting Independent Research

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**Disability.gov**: This is a resource website created by the federal government to information about services available to people with disabilities. It includes a feature to search by state (<https://www.usa.gov/disability-services>).

**ILRU.org**: This is a website that contains a directory of Centers for Independent Living and associations across the United States (<https://www.ilru.org/projects/cil-net/cil-center-and-association-directory>).

**Career One-Stop**: This website provides information about American Job Centers, along with a state directory (<http://www.careeronestop.org/>).

**SAMHSA's National Mental Health Information Center**: This website contains a mental health services locator by state: (<https://findtreatment.samhsa.gov/>).