

# Introduction

Over the past 22 years, the National Training and Data Center (NTDC) at Virginia Commonwealth University (VCU) has trained and certified more than 3,400 professionals to provide individualized work incentives counseling services to Social Security disability beneficiaries seeking to pursue their career goals and increase their financial independence. These highly skilled Community Work Incentives Coordinators (CWICs) and Community Partner Work Incentives Counselors (CPWICs) have met the needs of more than 900,000 beneficiaries in all 50 states, the District of Columbia, and five U.S. territories. The CWICs and CPWICs assist beneficiaries to make employment and financial decisions, including:

1. Developing immediate and long-term financial goals.
2. Understanding the effect of increased earnings on disability benefit amounts and eligibility status.
3. Making informed decisions related to the use of public and private health care coverage options.
4. Obtaining employment services from Employment Networks (ENs), state Vocational Rehabilitation (VR) agencies, or other community organizations.
5. Accessing and benefiting from community resources such as credit repair services, tax preparation assistance, financial education services, and other related supports.

## The Structure of the National Training Curriculum

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The National Training Curriculum is the foundation of all NTDC training and certification activities. We base our training activities and curriculum content on a comprehensive set of competencies that individuals must acquire to achieve the Social Security awarded work incentives counselor certification. We have grouped the approved competencies into seven distinct competency areas. We identify and briefly describe these training modules below.

## **Major Work Incentives Counseling Competency Areas**

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

## **Major Competency Areas**

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

Module 1 opens with a detailed description of WIPA services and the CWIC's role in promoting employment and financial independence for Social Security beneficiaries. We provide an overview of Social Security's major efforts to promote employment and increase financial independence for disability beneficiaries, including the Ticket to Work and Self-Sufficiency Program (TtW), Social Security/VR Reimbursement program, WIPA program, and Protection and Advocacy for Beneficiaries of Social Security (PABSS) program. This module also addresses eligibility criteria, referral procedures, and services available from various entities such as state VR agencies, American Job Centers administered by state Workforce agencies, and other employment service and support programs.

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

Module 2 focuses on providing effective outreach to individual Social Security beneficiaries, as well as outreach activities directed toward community agencies, stakeholder groups, and partner agencies. We describe how WIPA projects work in collaboration with the Ticket Program Manager (TPM) and the TtW Help Line to conduct outreach to Social Security disability beneficiaries who are eligible for the TtW program. Finally, the module addresses strategies CWICs can use to collaborate with other public and private community-based organizations such as

Social Security field offices, Employment Networks (ENs), American Job Centers, state VR agencies, public schools, mental health and developmental disabilities organizations, and financial services and asset-building organizations.

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

Module 3 presents detailed information on the Title II and SSI disability programs and work incentives, including how earned and unearned employment affects eligibility for benefits, cash payment amounts, and Medicare and Medicaid coverage; the impact of earned income on SSI and Title II disability benefits for concurrent beneficiaries; and the effect of Net Earnings from Self-Employment (NESE) on SSI and Title II cash payments. We also provide technical information on all the relevant Social Security work incentives such as Plans to Achieve Self-Support (PASS), Student Earned Income Exclusion (SEIE), Blind Work Expenses (BWE), Trial Work period (TWP), Extended Period of Eligibility (EPE), Subsidy & Special Conditions, Impairment Related Work Expenses (IRWE), and Expedited Reinstatement (EXR). Finally, Module 3 offers a comprehensive description of the TtW program, including Ticket eligibility, assignment and unassignment procedures, reporting requirements, timely progress requirements, and making referrals to ENs and state VR agencies.

### **Competency Area 4: Healthcare Planning and Counseling**

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

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

Module 5 provides information on multiple federal benefit programs and their associated work incentives, including Temporary Assistance to

Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), Housing and Urban Development (HUD) subsidies, Workers' Compensation, Unemployment Insurance (UI) benefits, veterans' benefits, and specialized savings programs. The module also describes the interaction of these programs with Social Security disability benefits.

### **Competency Area 6: Providing Effective WIPA Services**

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

### **Competency Area 7: WIPA Standards and Quality Considerations for CWICs**

Module 7 describes the minimum compliance requirements for WIPA projects as stated in the WIPA Cooperative Agreement Terms and Conditions. It also includes a unit that identifies specific indicators of high-quality WIPA services and addresses the CWIC's role in achieving these goals. Finally, we provide information on delivering WIPA services that adhere to the highest ethical standards, fully comply with the Americans with Disabilities Act and the Rehabilitation Act, and accommodate linguistic and cultural differences.

## **The National Training and Data Center at Virginia Commonwealth University**

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The NTDC is responsible for implementing a comprehensive program of training, certification, technical assistance, and ongoing professional development to individuals providing intensive work incentives counseling services to Social Security beneficiaries.

Susan O'Mara, the NTDC's Director and Co-Principal Investigator, leads our team of trainers, technical assistance liaisons, technology and accessibility specialists, and administrative professionals. In addition to

our initial training and certification program, the NTDC also operates a number of other important programs.

### **Technical Assistance**

The NTDC provides intensive technical assistance to individual CWICs and CPWICs, Program Managers, and entire WIPA program teams. Technical assistance includes individual support, site visits, and the development of technical assistance tools and resources.

### **Continuing Certification**

CWICs and CPWICs are required to obtain a prescribed number of Continuing Certification Credits (CCCs) each year in order to maintain the certification necessary to continue to provide services to beneficiaries. The NTDC offers a larger number of web courses, webinars (live and archived) and Benefit Summary and Analysis review to assist counselors to obtain the required credits.

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

The NTDC provides comprehensive training, certification, and technical assistance services to Customer Service Representatives (CSRs) who staff the Ticket to Work Help Line. The Help Line is the primary source of referrals to the WIPA programs.

### **BSADocs**

The NTDC operates the web-based BSADocs Benefit Summary and Analysis (BS&A) report development tool that assists CWICs to prepare individualized reports for beneficiaries that rely on Social Security approved structured interviews and reporting formats. The CWICs develop over 10,000 BS&As each year.

## **Acknowledgements**

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quality manual for CWICs and CPWICs that will form the basis of the NTDC training and certification activities for the coming year.

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Susan O'Mara

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