

# **Part II Chapter 14 – Supporting Beneficiaries to Manage Benefits**



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# Chapter 14 – Supporting Beneficiaries to Manage Benefits

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## Learning Objectives

After you have read this chapter and completed the associated lectures and activities during WIPA Initial Training, you should be able to:

1. Describe the four major functions CWICs perform to help beneficiaries develop benefits literacy.
2. Identify and describe what information Social Security requires Title II beneficiaries to report and the reporting options available to Title II disability beneficiaries.
3. Identify and describe what information Social Security requires SSI recipients to report and the reporting options available to SSI recipients.
4. Describe the specific tasks CWICs should perform to support beneficiaries with wage reporting.
5. Describe the CWIC's role in supporting beneficiaries to manage work incentives.
6. Describe the CWIC's role in helping beneficiaries with benefits problems unrelated to working.

## List of Acronyms

- BPQY – Benefits Planning Query
- BS&A – Benefits Summary and Analysis
- BWE – Blind Work Expenses
- CDR – Continuing Disability Review
- EIE – Earned Income Exclusion
- EPE – Extended Period of Eligibility
- GIE – General Income Exclusion
- IDA – Individual Development Accounts
- IRWE – Impairment Related Work Expenses
- myWR – My Wage Report

- PASS – Plan to Achieve Self-Support
- SEIE – Student Earned Income Exclusion
- SGA – Substantial Gainful Activity
- SSITWR – SSI Telephone Wage Report
- TWP – Trial Work Period

## **Benefits Literacy**

The phrase “benefits literacy” means acquiring an understanding of public income maintenance programs such as Social Security disability benefits, Supplemental Security Income, Medicaid or Medicare, SNAP, federal rental assistance, or any other income support a beneficiary receives. Far too often, beneficiaries are unaware of the rules for these programs.

Social Security disability beneficiaries need assistance from CWICs to understand their public benefits. This is one of the most important roles CWICs perform. The process of improving benefits literacy consists of the following steps:

1. Helping beneficiaries understand the eligibility requirements for their benefits. When beneficiaries understand the eligibility requirements they can understand when and why earnings can cause loss of essential cash payments and health insurance.
2. Actively teaching beneficiaries about the effect of earned income on benefits. This includes providing information on work incentives built into many benefit programs. When beneficiaries understand how wages affect benefits, they can plan and prepare for these changes.
3. Perhaps the most important part of benefits literacy is teaching beneficiaries to know what information beneficiaries must report to the various governmental agencies, and providing support in the process. Beneficiaries who do not report critical information in a timely fashion often experience an overpayment in benefits or other problems. In the WIPA program, there is no more important form of prevention than supporting beneficiaries to report information to Social Security on time using correct procedures.

4. Even with reporting, some benefit problems will occur. Another aspect of benefits literacy is teaching beneficiaries to recognize when problems occur and how to resolve common problems. In some cases, a beneficiary may need a CWIC to resolve a benefits issue, but CWICs can also empower individuals to take active control of their benefits by giving them the tools they need to identify problems and resolve them successfully.

## **Supporting Beneficiaries to Report Work**

Teaching beneficiaries how to correctly report to Social Security and other agencies that administer benefits is an important part of a CWIC's job. Beneficiaries may not understand the reporting requirements. For example, some beneficiaries may think that since Social Security is withholding deductions from their paychecks, Social Security is aware that they are working and have the required wage data. SSI recipients may not understand that changes in living arrangement and marital status can cause changes in benefits – including ineligibility for cash payments and health insurance. Understanding what to report, when to report, and how to report can prevent potential benefit problems. Let's take a closer look at reporting strategies for both the Title II disability programs and the SSI program.

### **Reporting within the Title II Disability Program**

The only types of income that can affect Title II benefits are Worker's Compensation/Public Disability Benefits and work income. Also, resources do not affect benefits in the Title II program: CDB, SSDI, or DWB. Most beneficiaries do not need to report unearned income, however beneficiaries must tell Social Security right away if:

- Work starts or stops; or
- Duties, hours, or pay changes; or
- They start or stop paying for items or services they need for work due to the disability (e.g., Impairment Related Work Expenses or IRWEs); or
- They start or stop getting help from their employer or others to perform their job duties (e.g., Subsidy/Special Conditions).

**Note:** There are other situations that beneficiaries must report to Social Security, such as receiving a Worker's Compensation benefit, changes in address, etc. The above list is especially important for working beneficiaries to avoid or reduce overpayments or underpayments related to work activity.

CWICs should encourage beneficiaries to report any of the changes listed above in writing or in person to the local field office. By reporting in writing, beneficiaries have documentation that they did make a report in case there are questions later. Beneficiaries may simply write a letter describing the employment status change. In some cases, the beneficiary may need to fill out a Work Activity Report form (SSA-821). The SSA-821 gathers additional details about the employment status change, potential work incentives, as well as recent and current earnings information for the beneficiary. The Claims Technician at Social Security uses this information to make decisions about how the change will affect the benefit. When beneficiaries promptly report changes in work activity, Claims Technicians are better able to determine when to request an SSA-821 to help them make these important decisions.

Title II beneficiaries must make the initial report of work to SSA by mail, on the phone or in person. After the initial report, they should report any change in work activity or a significant change in gross income. SSDI beneficiaries may report their wages monthly to establish a record of the earnings and receive a receipt for the report, however Social Security will not make a decision about those wages until a technician conducts a work Continuing Disability Review. Beneficiaries have several options for submitting this information, but Social Security prefers that beneficiaries report by using an online wage reporting application behind the "my Social Security" portal called "my Wage Report" (myWR). By using this option, disability beneficiaries and their representative payees can avoid visiting a field office to report their wages in person. When beneficiaries sign up for, or log into their my Social Security account, they will have access to this application on their desktop, laptop, and mobile device. Social Security must obtain an Employer Identification Number or EIN before a beneficiary can report earnings via myWR. CWICs should counsel beneficiaries to ask for this EIN from an employer and encourage beneficiaries to provide this, if able, when reporting new employment. After beneficiaries report their wages online, they can save or print a copy of their receipt. You can

learn more about **reporting wages through a my Social Security account** by going to Social Security's website (<https://faq.ssa.gov/en-us/Topic/article/KA-01412>).

Beneficiaries who are unable to use the myWR option can report wages by mailing or bringing pay stubs to their local Social Security office. Beneficiaries can find the nearest office by visiting the **Social Security office locator** (<https://www.ssa.gov/locator>). When beneficiaries report their earnings by mail, they may want to use "certified" mail to protect the security of their information and ensure that it arrives at Social Security. Social Security is required to provide beneficiaries with receipts to document all wage reports. CWICs should encourage beneficiaries to ask for a receipt when reporting. Beneficiaries should keep a notebook describing when and to whom they reported work, a copy of any written information they provide to Social Security as well as any receipts they receive.

## **Reporting in the SSI Program**

SSI requires different reporting protocols than the Title II disability program. Social Security needs wage and work incentive information as soon as possible to ensure the payment is accurate. Social Security requires SSI beneficiaries to report any changes that could affect their SSI benefit, including, but not limited to, the following:

- Unearned income, including payments like Unemployment Insurance, child support, or any other cash they receive.
- Earned income such as monthly gross wages or self-employment income. This also includes any in-kind items a beneficiary receives in-lieu of wages (like room and board).
- Changes in living arrangements including anyone moving into or out of the beneficiary's household.
- Any help a beneficiary receives with living expenses like rent, groceries, or utility bills.
- Changes in marital status such as getting married, separating from a spouse, or getting divorced.
- Resources or assets a beneficiary receives such as stocks, bonds, a second car, a second house, or other property.

Beneficiaries should report a change as soon as possible, but no later than ten days after the end of the month in which the change occurred. SSI beneficiaries who are working should report the gross amount of wages by the sixth day of the next month. For example, if an individual receives wages in July, they should report the total gross amount within the first six days of August.

These reporting requirements apply not only to the SSI beneficiary, but also to a spouse living with the beneficiary and parents of beneficiaries under age 18.

SSI beneficiaries have several options for reporting information to Social Security. SSI beneficiaries may report any of the changes listed above in writing or in person at the local field office. For changes in earnings status, as well as non-employment related changes, beneficiaries may use the **Statement of Claimant or Other Person, SSA-795** form (<https://www.ssa.gov/forms/ssa-795.pdf>). On this form, beneficiaries explain the change in their status and the date the change occurred, and mail or deliver it to the local field office. You can find the address of the local Social Security offices by using the **online locator** (<https://secure.ssa.gov/ICON/main.jsp>). Beneficiaries should keep a copy of any written information they provide to Social Security as well as any receipts they get after reporting.

Another reporting option available to SSI beneficiaries is the online wage-reporting tool "myWageReport" (myWR). In addition, SSI beneficiaries have several other automated reporting options that are unavailable to Title II disability beneficiaries. The first is the SSI Telephone Wage Reporting system (SSITWR), which permits beneficiaries or their representatives to call a toll-free number (1-866-772-0953) to report the prior month's gross wages. The second option is a mobile application that allows for monthly wage reporting using smartphone technology. Beneficiaries can download and install the SSI Mobile Wage Reporting (SSIMWR) application on an Apple or Android device. Both systems will accept wage reports on any day during the current month, but beneficiaries should report wages during the first six days of the month to prevent improper payments. Regardless of which automated method a beneficiary chooses to report wages, they can **sign up online to receive a monthly e-mail or text message wage-reporting reminder** (<https://www.ssa.gov/ssi/wage-reporting.html>).

Using one of the automated reporting systems is somewhat limited because they do not permit deductions for most work incentives that beneficiaries may access. If a beneficiary does not have work incentive deductions, these systems are a valuable and convenient tool. The individual will be required to authenticate their Social Security number, name, and date of birth. The system will mail a wage receipt to the beneficiary or their representative payee. CWICs should encourage beneficiaries and their representative payees to keep these receipts. The automated wage reporting systems work well for:

- Parents or spouses who are not disabled and need to report income that will be deemed to the beneficiary; and
- SSI beneficiaries with no work incentive deductions other than the Student Earned Income Exclusion (SEIE).

Wage reports made via the SSITWR and SSIMWR applications only apply to SSI. While concurrent beneficiaries can use these options to report wages for SSI, the information does not automatically transfer to the SSDI program and a separate report is necessary. The best option for concurrent beneficiaries is MyWR, as the one report will update both programs. People receiving only SSDI benefits cannot use the SSITWR or SSIMWR applications.

Those who may not use the automated wage reporting systems include individuals who:

- Have Impairment Related Work Expenses (IRWE);
- Meet the definition of statutory blindness and have Blind Work Expenses (BWE);
- Have a Plan to Achieve Self-Support (PASS);
- Have deemed income;
- Receive wages from more than one employer in a month; and
- Have Net Earnings from Self Employment (NESE).

## **The CWIC's Role in Supporting Beneficiaries with Reporting**

The current WIPA Terms and Conditions clearly indicates that Social Security expects CWICs to assume an active role in helping beneficiaries to report wage information. This document states the following:

“99% of engaged beneficiaries should receive information about reporting wages. BS&As developed for engaged beneficiaries must include information about reporting earnings. For statistical purposes, assisting with wage reports extends beyond instructing the beneficiary when and how to report. Instead, “Assisting” requires additional effort, such as completing forms with the beneficiary, going to the local Social Security office, or creating calendars and reminders, etc.”

There are four separate areas in which CWICs should help with wage reporting. Let's take a look at your responsibilities in each of these areas.

### **Provide Written Information about Reporting Responsibilities and Reporting Strategies**

- Provide all engaged beneficiaries with written information about reporting responsibilities and methods. We recommend using the following Social Security publications entitled (add title to SSA document) It is not enough to simply mail or email these resource materials to beneficiaries. You must review these handouts with beneficiaries to make certain they understand their reporting responsibilities and are clear about how to report information correctly within specific timelines. During this discussion, you should provide information about how to report income to other agencies besides Social Security, including addresses of agencies or online information or portals for agencies that administer other benefits.
- Include handouts on reporting responsibilities and methods as attachments to all Benefits Summary and Analysis (BS&A) reports. You should discuss these materials with beneficiaries as part of the BS&A review process and answer any questions beneficiaries pose. The BS&A report should also include

specific instruction on reporting wages to other applicable agencies, including addresses for local offices.

- When you discover that a beneficiary has started working at some point after engagement and BS&A development, you should contact the beneficiary to discuss reporting responsibilities. The more times you present information about reporting, the better.

### **Provide Assistance with Initial Work Reports**

- When you become aware that a beneficiary has started working, you should inform them that they should make initial work reports in writing, or in person by visiting the local field office. You should also instruct beneficiaries to keep copies of all wage information, letters used to report changes, and receipts Social Security issues after reporting. During this discussion, remind beneficiaries to submit a written report of employment to any other agencies that administer benefits affected by paid employment and provide addresses of these agencies, if applicable.
- Always ask beneficiaries if they need help with initial employment reporting and offer assistance as needed. The level of support you provide will vary based on the beneficiary's need. Make sure beneficiaries have the address of the correct field office to which to send (or take) correspondence. In some cases, the CWIC may need to make a report for the beneficiary. When a beneficiary is unable to report their wages be sure to coordinate with their support team to help support the beneficiary with reporting requirements.
- Make sure beneficiaries are aware of other agencies to which they need to report employment information. Ask beneficiaries if they need help with reporting to other agencies and provide any necessary assistance. This may include helping write a letter, completing forms, copying correspondence, or providing self-addressed stamped envelopes.

## **Provide Assistance with Ongoing Wage Reporting**

- After beneficiaries make their first wage report, review options for ongoing wage reporting. CWICs should review the options available and help beneficiaries select the best option based on the person's circumstances and preferences.
- Provide instruction on correct use of whatever reporting option beneficiaries choose. For beneficiaries who choose to report using a "my Social Security" account, you may need to help the beneficiary with setting up the account online. For SSI recipients who choose to use one of the automated wage reporting options, you may need to help the beneficiary set up the wage reporting application or figure out the monthly gross wages needed to report using the SSITWR system. CWICs should make sure beneficiaries know to contact them whenever they have questions about how or when to report.
- It is a good idea to contact newly employed beneficiaries on a monthly basis for at least the first three months to confirm that they have successfully completed all wage reporting tasks. This may include phone calls or email messages. After this point, you should initiate contact with beneficiaries at critical touch points at which benefits could change and always check on how wage reporting is going.
- Counsel beneficiaries on the importance of retaining wage information and receipts and offer advice about good ways to keep it organized. This may be as simple as putting paycheck stubs into a shoebox, or as complex as using specially designed Work and Wage Calendars. Take the time to teach beneficiaries to use whatever organizational systems best work for them, and make periodic checks to ensure that they are keeping the records they need.

## **Provide Assistance with Reporting Employment Changes Over Time**

- Remind beneficiaries to notify Social Security and other agencies that administer benefits of any significant change in employment as soon as they occur. This includes job loss, a

raise in hourly wages, or other job changes such as a significant change in hours the beneficiary worked.

- You should recommend that beneficiaries report these changes in writing or submit them in person to the local Field Office whenever possible. Help beneficiaries use Social Security forms to report this information as needed. Remind beneficiaries to keep a copy of all correspondence.

## **Supporting Beneficiaries to Use Work Incentives**

Assisting beneficiaries to use work incentives to further their vocational goals is another important function CWICs perform. Using available work incentives allows beneficiaries to experience a smooth transition from dependence on disability benefits through paid employment. Facilitating the use of work incentives requires significant expertise and this service is often unavailable elsewhere. This is a critical part of a CWICs job.

Your role in facilitating work incentives begins with your ability to recognize which work incentives might apply. Social Security applies some work incentives automatically when they evaluate a beneficiary's wages. For example, in the Title II disability program, this typically includes the Trial Work Period (TWP) and the Extended Period of Eligibility (EPE). In the SSI program, this includes applying the General Income Exclusion (GIE), the Earned Income Exclusion (EIE) and the ½ disregard. Other work incentives only apply under certain circumstances. Social Security staff may identify these work incentives when they evaluate a beneficiary's work. However, in some cases, beneficiaries may need to take the initiative by providing information about possible work incentive eligibility to Social Security. CWICs facilitate this process in five ways:

### **1. Identifying beneficiaries who are good candidates for using specific work incentives.**

Beneficiaries may be unaware that Social Security regulations include special work incentives that help certain individuals achieve their employment goals and ease the transition toward greater financial

independence through work. In the Title II disability program, these work incentives include Unsuccessful Work Attempt (UWA), Impairment Related Work Expenses (IRWEs) and Subsidy/Special Conditions. In the SSI program, special work incentives include the Student Earned Income Exclusion (SEIE), IRWEs, Blind Work Expenses (BWE), and Plans to Achieve Self-Support (PASS). These work incentives only apply under certain circumstances and not all beneficiaries can use them. CWICs should spot indicators that a beneficiary might be a good candidate for using a work incentive. CWICs who conduct thorough information gathering during the intake interview ask questions that help identify potential work incentives. Your ability to recognize when an individual could benefit from using special work incentives is important. Without your assistance, some beneficiaries may miss using valuable work supports.

## **2. Explaining to beneficiaries how work incentives can increase financial independence.**

Work incentives in both of Social Security's disability benefit programs are complex. CWICs provide counseling to help beneficiaries understand when they are good candidates for work incentives and offer accurate, easy-to-understand, information about how Social Security applies work incentives when they evaluate a beneficiary's work. For example, CWICs illustrate how IRWEs help SSI beneficiaries keep more of their SSI by using the SSI calculation sheet to compare the SSI cash payment with and without applying the IRWE. For Title II beneficiaries, CWICs would show beneficiaries how Social Security applies IRWEs to reduce countable earned income during work CDRs when they are making SGA determinations. This counseling includes showing beneficiaries the difference that applying work incentives makes in how earnings affect benefits as compared to the effect without applying work incentives. Providing customized information based upon a beneficiary's circumstances helps them understand how work incentives can help them with their initial or return to work efforts. CWICs reinforce this counseling with individualized work incentives information in BS&A reports and providing additional factsheets about various work incentives to supplement this information. CWICs should continue to look for indicators of potential work incentives during follow-up services as a beneficiary's situation may change.

### **3. Helping beneficiaries provide the information Social Security needs to apply work incentives.**

Most work incentives require that beneficiaries supply documentation to Social Security in order for the agency to decide if the work incentive applies to them. For example, beneficiaries with expenses they believe qualify as IRWEs or BWEs must provide information to Social Security describing what the expenses are, including an estimate of how much the expenses would be in a typical month. CWICs can help beneficiaries provide this information to Social Security in an organized fashion by using the Social Security form SSA-795.

In order for a Title II disability beneficiary to have subsidy or special conditions approved, Social Security needs information about special assistance the beneficiary is getting on the job from the employer (or other third party) as well as the estimated value of this assistance. You can help with this task by supporting the beneficiary to compile this information. In addition, when an employer subsidy is in evidence, Social Security will send the employer or other knowledgeable source a **Work Activity Questionnaire (SSA-3033)** to complete (<https://www.ssa.gov/forms/ssa-3033.pdf>). CWICs can provide a valuable service to the beneficiary and the employer by explaining what the form is and what information Social Security needs.

The most underused work incentive CWICs help with is a Plan to Achieve Self- Support. In order for Social Security to approve a PASS, beneficiaries must have a goal that is likely to reduce or eliminate benefits and must have expenses for goods or services they need to meet that goal. Social Security will exclude income or resources the person has and will replace all or part of the income or resources with SSI benefits (up to the Federal Benefit Rate). Beneficiaries use the **SSA-545 Plan to Achieve Self-Support** to outline their goal, the steps, the expenses, and the income they want to exclude (<https://www.ssa.gov/forms/ssa-545.html>). PASS requires a timeline for completing tasks that lead to the goal. CWICs help beneficiaries understand what information they need to gather to complete the PASS and support beneficiaries to develop the plan. CWICs can find helpful resources in the **PASS Resources** section of the VCU NTDC website ([https://vcu-ntdc.org/resources/resourceDetail\\_search.cfm?id=3#PASSResources](https://vcu-ntdc.org/resources/resourceDetail_search.cfm?id=3#PASSResources)).

#### **4. Supporting beneficiaries to use work incentives over time.**

Work incentives such as IRWEs, BWEs and PASS require beneficiaries to provide proof to Social Security that they paid for the expenses in order for them to be deducted from earned income. CWICs provide a valuable service by explaining what documentation beneficiaries need to retain. CWICs also need to explain how local Social Security staff want beneficiaries to submit work incentives documentation and how often to submit it. Part of supporting beneficiaries with this task involves offering advice about ways to file information so it is available when needed. CWICs should also follow-up on a regular basis to make sure that beneficiaries submit required information to Social Security in a timely fashion. As part of this process, CWICs need to explain to beneficiaries what to expect in terms of benefit changes. That way, beneficiaries can alert CWICs when expected changes do or do not occur.

#### **5. Helping beneficiaries resolve problems that arise related to using work incentives.**

To manage work incentives involves lots of communication between the beneficiary, the CWIC, and Social Security. There are many opportunities for something to go wrong. For example, in the Title II program, Social Security may not recognize that a beneficiary got vacation or sick pay that they should have deducted when determining countable wages during a Substantial Gainful Activity (SGA) determination. Another example would be that Social Security did not conduct a work Continuing Disability Review (CDR) promptly after the end of the TWP for a beneficiary who is engaging in SGA and should have benefits suspended. In the SSI program, a beneficiary may not have communicated that they were in school so Social Security did not know to apply the SEIE. An experienced CWIC can quickly spot a problem and take steps to support the beneficiary to correct it. However, new CWICs may need support from their TA Liaison in order to identify benefits issues. During this process, CWICs teach beneficiaries how to communicate with Social Security to resolve problems.

## Helping Beneficiaries with Benefits Issues Unrelated to Work

Although your primary function as a CWIC is to help beneficiaries understand the effect of work on benefits and to support access to work incentives, other events indirectly related to employment may require your help. Beneficiaries often seek assistance from CWICs on a wide range of benefit issues, regardless of whether they are related to work. To avoid becoming overwhelmed, you must learn when to assist with these issues and how far to go in providing help. The following events are common requests for assistance:

- Notices of overpayment that are not related to work incentives
- Medical CDRs
- Entitlement to other Social Security benefits
- Factors affecting eligibility for SSI or payment amount such as excess unearned income, excess resources, changes in in-kind support and maintenance (ISM), or changes in marital status.

For all of these non-employment related issues, your role consists of three parts:

1. First, you should explain the problem to the beneficiary and help them understand how the problem occurred. It is important for beneficiaries to understand how problems occurred to avoid repeating them in the future.
2. Second, you should provide specific step-by-step information about how to resolve the problem using Social Security's procedures. If there are different options available, explain the advantages or disadvantage of each. For example, regarding overpayments, you should explain how to request a reconsideration if the beneficiary disagrees that an overpayment occurred or disagrees with the overpayment amount. If the beneficiary agrees they were overpaid, you would provide information about how to request a waiver of overpayment. As part of this educational process, you should provide written information such as Social Security brochures and any relevant forms beneficiaries may need to complete.

3. Third, you should follow-up within an appropriate time period to see if the beneficiary was successful in resolving the problem, or requires additional information and support. Remember that your role in resolving non-employment related problems is limited, so be careful not to overstep your bounds. Your goal is to develop benefits literacy by teaching beneficiaries how to resolve common problems themselves - not to resolve them yourself. If the beneficiary encounters problems trying to resolve the issue, your job is to figure out what happened and review alternatives for moving ahead.

## Limits on Helping with Issues Unrelated to Employment

In the current WIPA Terms and Conditions document, Social Security states that WIPA program staff must not represent beneficiaries in appeals. Instead, CWICs may inform beneficiaries of their right to appeal and help them understand options to mitigate or respond to overpayments (e.g., requesting appeals, waivers, or payment plans). If needed, WIPA program staff may assist beneficiaries to complete required forms.

## Next Steps

There is a great deal that CWICs need to learn to support beneficiaries to manage their own benefits. This chapter has provided an introduction to this topic. In order to develop expertise in this area, you will need to participate in additional training and seek out technical support from your **NTDC Technical Assistance Liaison** (<https://vcu-ntdc.org/aboutus/liaisons.cfm>).

- To learn more about wage reporting and your role in supporting beneficiaries with this task, start by reviewing the **reporting resources** available on the NTDC website ([https://vcu-ntdc.org/resources/resourceDetail\\_search.cfm?id=3](https://vcu-ntdc.org/resources/resourceDetail_search.cfm?id=3)). You may also participate in an archived supplemental training that covers the **CWICs role in helping beneficiaries with**

**reporting** found on the NTDC website (<https://vcu-ntdc.org/training/supplemental/archives.cfm>).

- As a new CWIC, you will require a lot of support when it comes to your role in facilitating the use of complex work incentives such as IRWE, Subsidy/Special Conditions, BWEs and PASS. Until you gain experience in this area, you will need to work with your WIPA program director and your TA Liaison as you identify beneficiaries who are good candidates for special work incentives. Your WIPA director and TA Liaison will provide you with specific instruction about your role in facilitating each work incentive, and also help you resolve problems that beneficiaries may encounter with using work incentives.

