Part II Chapter 9 – Community Relations and Education in the WIPA Program
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Chapter 9 – Community Relations and Education in the WIPA Program

Learning Objectives

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

1. Identify and describe the three major objectives WIPA personnel have when conducting community relations and education activity;

2. Describe why developing strong relationships with key Social Security personnel is important for CWICs;

3. Describe the main functions performed by key Social Security personnel including Service Representatives (SRs), Claims Specialists (CSs), Work Incentives Liaisons (WILs), and Area Work Incentives Coordinators (AWICs);

4. Describe the purpose of the Ticket-to-Work Help Line and how the Helpline assists WIPA programs;

5. Describe effective strategies for conducting community education activities to increase awareness of WIPA services; and

6. Describe effective strategies for conducting community education activities to increase understanding of how paid employment affects Social Security disability benefits.

List of Acronyms

- AWIC – Area Work Incentives Coordinator
- BPQY – Benefits Planning Query
- BSS – Beneficiary Support Specialist
- CS – Claims Specialist
- CWIC – Community Work Incentives Coordinator
- DO – District Office
- FO – Field Office
The Importance of Community Relations and Education

WIPA services cannot be provided effectively in a vacuum. CWICs need to interact with numerous groups in their local communities including disability beneficiaries, Social Security field offices, agencies that administer other federal, state or local benefits, and entities that make referrals for WIPA services. CWICs have three major objectives when they conduct community relations and education activity in the WIPA program:

1. Build positive relationships with key community partners to increase appropriate WIPA referrals, facilitate efficient verification of benefits, and improve interagency communication and collaboration that supports the employment of disability beneficiaries.

2. Raise awareness of WIPA services within the disability community by educating beneficiaries and community partners about what WIPA services include and whom Social Security intends the program to assist.

3. Promote employment of people with disabilities by educating beneficiaries and community partners on how earned income affects Social Security disability benefits and how work incentives can help achieve employment goals.
Social Security’s Requirements Related to Community Relations and Education

Social Security requires that WIPA programs work to develop relationships with the local Field Offices, Work Incentives Liaisons (WIL), Area Work Incentives Coordinators (AWIC), and staff who support beneficiaries with Plans to Achieve Self-Support (PASS) or PASS Specialists. In addition, WIPA program staff must become familiar with the Employment Networks (EN) within their service area and refer beneficiaries to those ENs when appropriate. EN’s hold agreements with Social Security to provide employment services to beneficiaries. WIPA program staff must also become familiar with the Protection and Advocacy for Beneficiaries of Social Security (PABSS) agencies within their service area and must refer beneficiaries to those agencies when appropriate. PABSS grantees provide legal advocacy and support to assist beneficiaries who face barriers to employment. Finally, WIPA program staff should work cooperatively with federal, state, local, private, and other organizations that serve beneficiaries with disabilities seeking employment.

Social Security also imposes certain limits on WIPA outreach activity. For example, WIPA programs may only use outreach materials (brochures, fliers, presentations) that Social Security has reviewed and approved. VCU’s NTDC has developed a variety of standard WIPA outreach materials that are pre-approved to help with this process. We provide you with links to these materials further on in this chapter. In addition, WIPA programs are required to limit travel costs associated with outreach efforts and coordinate outreach events with community partners including AWICs, PABSS grantees, State VR agencies, America’s Job Centers, and other programs that may benefit WIPA clients. From year to year, there may be additional requirements related to how much outreach activity WIPA programs are allowed to perform or other limits. These requirements will be described in the current WIPA Terms and Conditions document that is part of your agency’s cooperative agreement with Social Security. Your WIPA Program Director can provide you with a copy of the Terms and Conditions. It is important for you to read this document so you understand what Social Security expects.

Social Security also requires WIPA programs to focus outreach activity on certain high priority groups. WIPA projects must target outreach to
U.S. Military Veterans with disabilities and beneficiaries experiencing barriers to work due to their characteristics or circumstances such as persons of color; members of religious minorities; LGBTQ+ persons; persons with underserved disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality. In addition, Social Security requires that WIPA programs target outreach to transition aged youth. Social Security defines transition aged youth as disability beneficiaries between the ages of 14 and 25. Outreach to youth should include communication with schools, vocational rehabilitation programs, and parents. Check with your WIPA Program Director to find out what outreach activities your agency performs that target these special groups.

Getting Started with Community Relations and Education

The activities in which you will participate that promote community relations and education will be varied. Relationship building activities will include introductory meetings with key personnel at Social Security, State Vocational Rehabilitation Agencies, and agencies that administer other federal, state and local benefits. Community education activities may include attending conferences, community meetings, or resource fairs to disseminate WIPA educational materials, or providing presentations to beneficiaries or partner agencies. To find out more about your role in conducting WIPA community relations and outreach, you should begin by talking to your WIPA Program Director. Each WIPA program uses different approaches to build relationships with key partners and educate community members about WIPA services. Many WIPA programs have been operating for a long time and already have strong relationships with Social Security field offices and other key partners. As a new staff person, you will need to find out what is already in place before you attempt to conduct outreach. Your WIPA Program Director will provide you with the information you need to get started.
Building Relationships with Key Community Partners

CWICs perform outreach to develop collaborative relationships with key personnel within community partner agencies. The most important agencies you will interact with are:

- The Social Security Administration
- The Ticket to Work (TTW) Help Line
- Employment Networks (ENs)
- State Vocational Rehabilitation (VR) agencies
- Protection and Advocacy for Beneficiaries of Social Security (PABSS)
- Other agencies that administer federal, state and local benefits

CWICs rely on strong collaborative relationships with these entities to access critical information they need to perform high quality benefits counseling services. You will need positive relationships with Social Security personnel in order to verify Social Security disability benefits and get answers to questions about benefits and work incentives usage. Establishing relationships with agencies that administer other federal, state or local benefits will help you access critical training on how these benefits are affected by employment and facilitate efficient benefits verification. You will also need to nurture positive relationships with agencies that make WIPA referrals to ensure that referrals meet program priorities and to help process referrals smoothly. Quite simply, CWICs who take the time to build functional networks with community agencies provide better WIPA services to beneficiaries in a timely manner. Let’s take a closer look at some of the key agencies with which you need to develop relationships and some proven strategies for relationship development.

Working with the Social Security Administration

To collaborate with Social Security, CWICs 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 do not provide services to beneficiaries directly. You can find a listing of Social Security Regional Offices with contact information on Social Security’s website (https://www.ssa.gov/slge/specialists.htm).

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 1,300 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, there are six processing centers and the 130 hearing offices that 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 types of Social Security employees who are on the front line in delivering service to beneficiaries and applicants: Service Representatives (SRs) and Claims Specialists (CS). Let’s take a look at the duties for each position.

**Customer Service Representatives**

In most field offices, the first Social Security employee a beneficiary or applicant has contact with is a Customer Service Representative, often shortened to just Service Representative (SR). 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 cannot resolve, a Claims Specialist typically provides assistance.

**Claims Specialists**

This is the key position through which Social Security achieves its major operating objective of bringing direct personal service to the public. Duties performed by Claims Specialists (CS) include (but are not 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, assisting beneficiaries to provide required evidence;

- Conducting interviews, developing, investigating, and resolving post-entitlement actions, including SSI redeterminations, which may involve suspension, resumption, or termination of eligibility or payments;
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;

Recognizing the need for and approving the selection of representative payees for individuals unable to handle their own benefits;

Developing, investigating, and resolving discrepancies in earnings and determining amounts to be posted or deleted from individual records. Claims Specialists also determine countable earned income for both Title II and SSI benefits and apply work incentives when making decisions about how earned income affects benefit eligibility and payment amounts; and

Assisting claimants in filing for administrative appeals in matters concerning entitlement to benefits or coverage under the various programs.

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 (CS) act as the designated Work Incentive Liaison (WIL) in addition to their regular CR duties. These are not 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 an experienced 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. 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 beneficiary-specific work incentives issues for WIPA programs.

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.

**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.

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 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

Building functional relationships with key Social Security personnel will help you provide better WIPA services. One of the most important ways Social Security employees can help you is to provide prompt access to Benefits Planning Queries (BPQYs) 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. Claims Specialists can also help by correcting issues in the BPQY 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 BPQYs. In other areas, the AWIC is the contact person for help with BPQY questions. You will learn more about the BPQY report and how to use those reports in your daily work by reading the chapter in this part of the manual on verifying benefits.

You also need to build relationships with key Social Security staff so that you can get questions answered about beneficiaries you are serving. Not everything you need to know will be on a BPQY report. There are often instances in which you need to communicate directly with the AWIC, WIL or Claims Specialist to gather more information, answer questions or confirm various benefits issues. There is no way for a CWIC to provide comprehensive and individualized WIPA services to disability beneficiaries without the ability to occasionally communicate with Social Security staff.

The first step in your relationship building effort should be meeting with your WIPA Program Director to find out who the key players are in each field office you will be serving. Your Program Director and WIPA colleagues probably have already established relationships with the Field Office Managers, WILs, AWICs, and key Claims Specialists. You do not want to waste time duplicating work they have already done to build collaborative relationships. Once you have the names and contact information of the key Social Security personnel, you should introduce yourself by email. In the email, you should request a time to speak by phone. The important things to review during your conversations with
Social Security staff are what WIPA services include, which beneficiaries are a priority for services, and how to contact you.

**Working with the Ticket to Work Help Line**

For general questions or guidance, 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. The Ticket to Work (TTW) Help Line is often a beneficiary’s first point of contact in their return to work efforts.

The TTW Help Line is staffed by Beneficiary Support Specialists (BSSs). These staff persons provide information about the Ticket program, confirm beneficiary eligibility, and respond to specific questions. Help Line BSSs also offer callers a list of service providers in their area that includes ENs, State Vocational Rehabilitation (VR) agencies, WIPA programs, 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 “Find Help” tool on the Choose Work website, where callers can create and print their own list. BSSs mail more than 4,000 lists every month. BSSs 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 program.

The Help Line is a critical referral source for WIPA programs and they provide a valuable service by screening callers to identify those who are a high priority for WIPA services. To ensure appropriate beneficiary referrals, BSSs:

- Identify callers who are working, have job offers, or are interviewing for jobs;
- Provide basic information to help beneficiaries understand the SSI and title II disability 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 program 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 referrals for services, such as PABSS (Protection and Advocacy for Beneficiaries of Social Security) programs and other organizations responsible for local or state benefits programs and resources, as appropriate.

Prior to making a referral to the WIPA programs, Help Line BSSs screen 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 BSSs also collect demographic information and record information on Ticket status, employment status, the beneficiary’s county of residence. Once the BSS has determined that a beneficiary is eligible for WIPA services and appropriate for referral, the BSS generates a referral to the servicing WIPA program using an encrypted email system. WIPA programs check for Help Line referrals on a daily basis and are responsible for contacting beneficiaries to initiate service within certain time frames.

To learn more about your role in working with the TTW Help Line you can refer to an archived training entitled Engaging Ticket to Work Help Line Referrals found on the NTDC website (https://vcu-ntdc.org/training/supplemental/archives.cfm).

**Working with Employment Networks**

An Employment Network (EN) is an entity that enters into an agreement with Social Security to either provide or coordinate the delivery of services to Social Security disability beneficiaries. The EN can be an individual, a partnership/alliance (public or private) or a consortium of organizations collaborating to combine resources to serve
eligible individuals. ENs participating in the Ticket to Work Program (Ticket Program) must adhere to certain rules and regulations. Many beneficiaries can benefit from the employment services and supports provided by ENs. These agencies provide a wide variety of employment services, such as vocational counseling, job skill training, job placement assistance, supported or customized employment, and many others. Some ENs specialize with certain groups of individuals, such as those who require extensive assistive technology or specific types of job accommodations. Others focus on transition-age youth, English language learners, or other specialized populations. Keep in mind that some ENs do not provide a direct service, but rather process ticket payments to reimburse beneficiaries directly for the cost of services or items they purchase in order to work. You can find a listing of ENs on Social Security’s website (https://choosework.ssa.gov/findhelp/).

Your objective when establishing relationships with local ENs is to gain an understanding of the services each one provides so that you can provide appropriate referrals. In addition, you need to make sure that local ENs are aware of your WIPA program and the services you provide, and know how to make a referral. We will provide more information about how WIPA programs interact with ENs in Chapter 11.

**Working with Protection and Advocacy for Beneficiaries of Social Security (PABSS)**

Social Security provides funding to the State Protection and Advocacy (P&A) systems to assist beneficiaries with disabilities in their efforts to begin and to maintain employment. This program is called Protection and Advocacy for Beneficiaries of Social Security (PABSS). PABSS services include:

- Advocacy and related services for beneficiaries participating in the Ticket to Work Program;
- Information and advice about receiving vocational rehabilitation and employment services; and
- Advocacy or other related services that Social Security beneficiaries may need to secure or regain gainful employment.
The PABSS program helps Social Security disability beneficiaries who need assistance with issues involving their employment service providers, employers, WIPA programs, or Social Security. Situations that PABSS may assist with include inadequate services provided by ENs, rights violations, adverse Social Security work-related decisions or overpayments, or Ticket-to-Work issues. To find the PABSS serving your area, visit https://choosework.ssa.gov/findhelp/.

Your objective when establishing relationships with your state PABSS program is to gain an understanding of the types of advocacy services they provide so that you can make appropriate referrals. Each PABSS program is different in terms of the types of cases they will accept and the advocacy areas in which they focus. In addition, you need to make sure that the PABSS advocates are aware of your WIPA program and the services you provide, and know how to make a referral. We will provide more information about how WIPA programs interact with PABSS programs in Chapter 11.

**Working with Other Agencies that Administer Federal, State, and Local Benefits**

Many of the individuals you will serve will have additional benefits beyond the Social Security disability program. This may include food stamps, Medicaid, federal rental subsidies, energy assistance, workers compensation or unemployment insurance. All of these benefits may be affected by paid employment, so the counseling you provide must cover all benefits an individual receives. WIPA program staff are required to verify the type and amount of other federal, state or local benefits an individual receives, so you need to establish relationships with the local agencies that administer those programs to access that information.

The first step in working with all of these other agencies is to check with your WIPA Program Director to get local contact information and learn how these agencies process requests for benefits verification. Once you have this information, you can begin to make introductory calls or send introductory email messages. It is very important for you to spend the time necessary to develop relationships with key personnel within these local agencies. Without these relationships, you will not be able to verify critical information you need to perform comprehensive
individualized WIPA services. We provide you with more information about how to work with local agencies to verify benefits in Chapter 12.

Performing Community Education Activities

WIPA programs perform community education activities to raise awareness of WIPA services within the disability community. These activities focus on educating beneficiaries and community partners about what WIPA services include and whom Social Security intends them to assist. Social Security places some limits on this type of outreach activity, so be sure to discuss outreach with your WIPA Program Director before performing any community education activities.

Community education activities often include making presentations to community groups either in person or using meeting software. When CWICs make presentations, 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 is not eligible for services to attract appropriate referrals. Do not assume the audience knows who to refer or who would benefit from WIPA services. Provide written information listing eligibility criteria. The more you educate your referral sources, the less time you will waste handling inappropriate referrals. It’s also important to 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
programs provide representative payee services. WIPA personnel should never engage in this function. Sometimes referral sources think that WIPA projects report all wages to Social Security. CWICs should assist beneficiaries to make their own wage reports, not make the report directly. If referral sources have unrealistic expectations about what the program does, they will make inappropriate referrals or be disappointed in the services. Manage expectations by providing clear written information during presentations. Keep in mind that any material you disseminate must be approved in advance by Social Security. The VCU NTDC website contains a pre-approved WIPA PowerPoint presentation WIPA personnel should use when describing the WIPA program to community partners (https://vcu-ntdc.org/resources/viewContent.cfm?contentID=194).

WIPA 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. It is quite possible for Social Security beneficiaries with disabilities to work and retain cash payments and 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 work incentives can ease the fear and uncertainty about employment many beneficiaries and the professionals who serve them feel. Knowledge of Social Security and other work incentives truly is power in this instance.

You will find approved outreach materials including PowerPoint presentations about how work affects disability benefits on the NTDC website (https://vcu-ntdc.org/resources/resourceDetail_search.cfm?id=7).

Next Steps

In this chapter, we provided a very basic overview of community relations and education within the WIPA program. Once you begin serving beneficiaries, you will need to learn more about how to build
effective relationships with key community partner agencies and how to educate stakeholder groups about WIPA services and how paid employment affects Social Security disability benefits. As we have stated several times in this chapter, the first step is to meet with your WIPA Program Director to learn more about the key players in your service area and how your program conducts outreach. As part of a larger WIPA program team, you need to provide outreach that is consistent with your colleagues. You also do not want to waste time searching for key contacts when that information already exists. After you have met with your program director and WIPA team, here are some additional sources of information you can access:

1. Begin by reviewing all of the **WIPA outreach resources** available to CWICs by going to the NTDC website (https://vcu-ndtc.org/resources/resourceDetail_search.cfm?id=7). You will find PowerPoint presentations, resource documents and specialized resources for targeted populations such as transition age youth. Remember that you may only use materials that Social Security has reviewed and approved. Social Security has reviewed all materials on the NTDC website as a resource for your use.

2. Working collaboratively with the ENs that serve your area is very important. You can learn more about developing relationships with ENs by reading a resource document **The Role of CWICs in Supporting ENs under the TtW Program** found on the NTDC website (https://vcu-ndtc.org/resources/viewContent.cfm?contentID=88).

3. Serving transition age youth is a high priority for Social Security. Conducting outreach to this special population can be challenging. To learn more about that, you can take an archived training session entitled **Providing WIPA Services to Transition Age Youth** found on the NTDC website (https://vcu-ndtc.org/training/supplemental/archives.cfm).