Instructions for Part One of the CWIC and Community Partner Work Incentives Counselor Assessment and Certification Process

September 2016

To be certified to provide work incentives planning and assistance services to Social Security beneficiaries, WIPA CWICs must participate in the intensive five (5) day Initial Training session and, immediately following participation in the training, successfully complete a series of assessment activities. Social Security also provides an opportunity for staff of partnering organizations to pursue Community Partner certification. Individuals pursuing Community Partner certification are also required to participate in the Initial Training and the two-part assessment process for certification.

The assessment activities you will be participating in are designed to evaluate your initial proficiency in each of the main competency areas addressed in the WIPA & Community Partner Work Incentives Counseling training manual and taught during the initial training class. There are two parts to the assessment and certification process, including:

- **Part One:** Part One of the certification process takes place in the six-week period immediately following your return from the training class and involves completing a series of online competency-based assessments. For all participants, successful completion of the assessments during this six-week period results in the authorization to continue on to Part Two of the certification process.

  For WIPA CWICs, successful completion of the Part One assessments also provides authorization to begin providing services to Social Security beneficiaries. *(Note: WIPA staff must also have the required security clearance before beginning to serve beneficiaries.)*

  The Part One assessment process takes, on average, **25-45 hours of time over the six-week period.** Participants should plan to budget their time accordingly.

- **Part Two:** All participants who are successful in completing the Part One assessments will be notified by email of the opportunity to complete the Part Two requirements for certification. Detailed information on the Part Two assessments and requirements will be included in the email notification.
The Part One assessment phases, specific activities, and time frames are described in detail in the following section.

**Note:** The exam answers and assignments you submit must be developed exclusively through your own work. You are not permitted to work with other certified CWICs or colleagues to complete the certification assessments. If it is determined that a participant has not submitted their own independent work on the assessments, he or she will not pass the assessment and will not be certified!

### Accommodation Requests

If you need an accommodation or any type of support to participate in and complete the assessment and certification process, please contact Julie Schall as soon as possible to discuss support needs and make necessary arrangements. The VCU National Training and Data Center staff must be notified of any accommodations or supports provided to certification candidates in advance.

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### Part One of the CWIC Assessment and Certification Process

Part One of the assessment and certification process is comprised of two distinct phases.

#### Phase One: Initial Assessment Exams

The first phase of the assessment and certification process involves completing a series of five exams. These exams correspond with the first five competency areas and modules in the training manual:

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
Each of the five exams is a written exam that includes both multiple choice and true/false responses to questions. All parts of the exam are “open-book,” meaning that you are permitted to use your training manual while working through the questions.

While all five exams must be completed by a specific due date, there are no time limits for completing the individual exams. You may work at your own pace and take as much time as necessary within the timeframe.

All training participants (CWICs and community partner staff) are required to achieve a passing score of 80% on each of the five exams to successfully complete Phase One of the certification process. If a passing score is not obtained, you will be provided an opportunity to retake the exam(s).

**Important Information on Second Attempts:** Only two (2) attempts are provided to achieve a passing score on each of the exams. If you have questions related to the exam(s) and/or any feedback provided on your initial attempt, you should contact your VCU Technical Assistance Liaison/instructor to debrief before moving forward with your second attempt.

If a CWIC does not achieve a passing score on the second attempt, a conference call will be scheduled to discuss next steps. The CWIC’s supervisor, the WIPA Project’s Social Security Project Officer, and VCU Technical Liaison/instructor will be involved in this discussion.

If a community partner participant is not successful in achieving a passing score on their second attempt, he/she will not be eligible for Community Partner Work Incentives Counselor Certification and participation in the assessment and certification process will end. To pursue Community Partner certification at a later date, it will be necessary to attend the Initial Training session once again, and begin the certification process over again with the new class.

**Phase One Calendar**

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<tr>
<th>Week 1</th>
<th>Participants complete all five (5) competency assessment exams.</th>
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<tr>
<td>Week 2</td>
<td>Exams are graded and results posted in grade book; participants retake exam(s) as necessary.</td>
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**Phase Two: Module 6 Portfolio Assignments and Module 7 Competency Assessment**
Following successful completion of all Phase One exams, training participants are eligible to begin the Phase Two assessment. Phase Two of the initial competency assessment process involves a series of five practical assignments covering the various aspects of providing effective WIPA and community partner work incentives counseling services and one competency assessment. These materials are covered in Modules 6 and 7 of the training manual.

The five assignments and one exam will be completed over a five week period of time, and test each of the major competency areas contained in Module 6 and 7 of the training manual.

**Module 6 Assignments**

- Assignment 1: Case Study practical assignment involving how to manage initial request for WIPA services
- Assignment 2: Submission of a written Benefits Summary & Analysis (BS&A) Planning Sheet based on a specific case study
- Assignment 3: Submission of a written Benefits Summary & Analysis (BS&A) based on a specific case study
- Assignment 4: Submission of a Work Incentives Plan (WIP) based on a specific case study
- Assignment 5: Case study practical assignment involving long-term benefits management with critical touch-points and problem-solving

**Module 7 Assessment**

The last exam corresponds with the last competency area and Module 7 in the training manual, WIPA Standards, Data Collection Requirements, and Quality Considerations for CWICs.

This exam is a written exam that includes both multiple choice and true / false responses to questions. All parts of the exam are “open-book,” meaning that you are permitted to use your training manual while working through the questions.

Participants are required to achieve a passing score of **80%** on each of the five Module 6 assignments and Module 7 competency assessment exam. Again, CWICs and community partners are provided only two attempts to achieve a passing score on each of the Module 6 assignments and Module 7 assessment.
**Important Information on Second Attempts:** Specific information on the timeline for completing and submitting second attempts is included in the instructions for each Module 6 assignment and the Module 7 exam in Blackboard. It is your responsibility to carefully review and comply with the instructions and submission timeframes. If you have questions related to the assignment(s), exam, submission timeframes, and/or any feedback provided on your initial attempt, you should contact your VCU Technical Assistance Liaison/instructor to debrief before moving forward with your second attempt.

If a CWIC does not achieve a passing score on the second attempt, a conference call will be scheduled to discuss next steps. The CWIC’s supervisor, the WIPA Project’s Social Security Project Officer and VCU Technical Liaison/instructor will be involved in this discussion.

If a community partner participant is not successful in achieving a passing score on their second attempt, he or she will not be eligible for Community Partner Work Incentives Counselor Certification and participation in the assessment and certification process will end. To pursue Community Partner certification at a later date, it will be necessary to attend the Initial Training session once again, and begin the certification process over again with the new class.

**Phase Two Calendar**

<table>
<thead>
<tr>
<th>Week</th>
<th>Task</th>
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<tbody>
<tr>
<td>Week 2</td>
<td>Module 6, Assignment 1 and 2 due</td>
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<tr>
<td>Week 3</td>
<td>Module 6, Assignment 3 due</td>
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<tr>
<td>Week 4</td>
<td>Module 6, Assignment 4 due</td>
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<tr>
<td>Week 5</td>
<td>Module 6, Assignment 5 due</td>
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<tr>
<td>Week 6</td>
<td>Module 7 exam due</td>
</tr>
<tr>
<td>Week 7</td>
<td>Scoring completed and results posted in grade book</td>
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**How Will I Access the Assessment Tools and Information?**

Part One of the assessment and certification process will be implemented and managed using the **Blackboard Learn System**. Blackboard is a web-based learning system. We will email you with a username and password to access Blackboard, as well as information on how to log on to the system and assessment site.

To support you in beginning the process and answer any questions you may have regarding Blackboard and the assessments, a pre-training orientation conference call is held approximately one week prior to the Initial Training. It is mandatory for all participants attending the Initial Training to participate in this call. It is strongly recommended that participants’ supervisors join the call as well.
**Who will be grading my exams and assignments and how will I know how I am doing?**

A member of the VCU NTDC team will be assigned to review and score each of the assignments you complete. In most instances, this will be the same person who serves as Technical Assistance Liaison for your region.

Your assigned Technical Assistance Liaison/instructor will serve as your primary point of contact for any questions or difficulties you may be experiencing throughout the assessment process.

**When and how will I be notified of my successful completion of Part One of the certification process?**

After the final grading is completed, you will be notified via email as to whether or not you have successfully completed all Part One assessments. Participants who are successful in completing the Part One requirements will be provided detailed information on the Part Two assessment and certification process in this email communication.

Please note that certification is not achieved until a participant successfully completes both the Part One and Part Two assessment requirements. A certificate is only provided upon successful completion of Part Two of the certification process.