



2018 CWIC Initial Training

AGENDA

DAY ONE

8:00 – 8:30

Welcome and introductions
Review of agenda and initial training manual

8:30 – 9:30

Social Security's commitment and role in supporting WIPA
Services for disability beneficiaries
Understanding Social Security's work initiatives and the role of financial stability

9:30 – 10:00

Role of WIPA in promoting work and financial stability for beneficiaries

10:00 – 10:15

BREAK

10:15 – 10:45

Outreach under the new WIPA service model
Targeting outreach activity on transition age youth
Working with the Ticket Program Manager(TPM) and the Ticket Help Line

10:45 – 12:00

Orientation to Social Security Administration
Definition of disability
Continuing Disability Reviews (CDRs)
Section 301

12:00 – 12:15

Appeals and Overpayments

12:15 – 1:30

LUNCH on your own

1:30 – 2:45

Overview of Title II disability benefits

2:45 – 3:00

BREAK

3:00 – 4:30

Trial Work Period (TWP)
Understanding Substantial Gainful Activity (SGA)
Subsidies and Special Conditions

DAY TWO

8:00 – 8:45

Debrief homework and review material from Day 1

8:45 – 10:00

Impairment Related Work Expense (IRWE)
Unsuccessful Work Attempt (UWA)
Income Averaging

10:00 – 10:15

BREAK

10:15 – 12:00

Cessation Month/Grace Period
Extended Period of Eligibility (EPE)
Expedited Reinstatement (EXR)

12:00 – 1:15

LUNCH on your own

1:15 – 2:30

Understanding Medicare
Extended Period of Medicare Coverage (EPMC)
Premium HI Coverage

2:45 – 3:00

BREAK

3:00 – 3:15

Counseling beneficiaries about employer-provided insurance

3:15 – 3:45

Practice quiz

3:45 – 4:30

Ticket to Work

DAY THREE

8:00 – 8:45

Debrief homework and review of Day 2

8:45 – 9:45

Understanding Supplemental Security Income (SSI)

- Income and SSI
- Resources and SSI

9:45– 10:00

BREAK

10:00 – 10:45

Deeming
In-Kind Support and Maintenance (ISM)

Eligible couples
10:45–11:30
SSI Calculations
11:30-12:00
Student Earned Income Exclusion (SEIE)
12:00 – 1:15
LUNCH on your own
1:15 – 2:00
Impairment Related Work Expense (IRWE)
Blind Work Expenses (BWE)
2:00 – 2:45
Plan for Achieving Self Support (PASS)
2:45– 3:00
BREAK
3:00 – 4:00
PASS Continued
4:00 – 4:30
Accessing Online Resources

DAY FOUR

8:00 – 8:45
Debrief homework and review of Day 3
8:45 – 10:00
Understanding Medicaid – eligibility and covered services
Special Medicaid Beneficiaries
Medically Needy or Spend-Down Program
Medicaid Buy-In Programs
10:00 – 10:15
BREAK
10:15 – 11:45
Home and Community-Based Services (HCBS) Waivers
State Child Health Insurance Program (SCHIP)
Medicare Saving Programs (MSP)
Low Income Subsidy (LIS)
11:45 – 1:00
LUNCH on your own
1:00 – 1:30
Practice Quiz
1:15-1:45
Understanding concurrent beneficiaries

1:45 – 2:45
Zoey exercise

2:45 – 3:00
BREAK

3:00 – 3:30
Debrief Zoey exercise

3:30 - 4:30
Eligibility for WIPA services

DAY FIVE

8:00 – 9:00
Prioritization of Eligible Referrals

9:00 – 9:45
Information gathering

9:45 – 10:00
BREAK

10:00-10:45
Verifying benefits and using BPQY reports

10:45 – 11:30
Developing individualized Benefits Summary & Analyses (BSAs)

11:30 – 12:15
LUNCH on your own

12:15 – 1:15
Developing BSA's continued
Exercise #20

1:15 – 1:45
Developing Work Incentives Plans (WIPs)

1:45 – 2:00
BREAK

2:00 – 3:10
Providing work incentives management services and ongoing follow-up

3:10 – 3:30
Next steps
Evaluations