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

February 2018

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 I:** Part I 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 II of the certification process.

  For WIPA CWICs, successful completion of the Part I 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 I assessment process takes, on average, **25-45 hours of time over the six-week period**. Participants should plan to budget their time accordingly.

- **Part II:** We will email all participants who are successful in completing the Part I assessments to notify them of the opportunity to complete the Part II requirements for certification. Detailed information on the Part II assessments and requirements will be included in the email notification.
The Part I 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 I of the CWIC Assessment and Certification Process**

Part I 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.
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 you do not achieve a passing score on your first submission, you will have an opportunity to retake the exam(s).

**Important Information on Second Attempts:** Your second attempt is your final opportunity 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, we will schedule a conference call 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**

<table>
<thead>
<tr>
<th>Week 1</th>
<th>Participants must complete all five (5) competency assessment exams.</th>
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<tbody>
<tr>
<td>Week 2</td>
<td>Exams are graded and results posted in grade book; participants complete second attempts on exam(s) as necessary.</td>
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While all five exams must be completed during the a specific timeframe, there are no specific due dates within this timeframe for completing the individual exams. You may work at your own pace and take as much time as necessary for each exam within the timeframe.

**Important:** It is your responsibility to ensure that all of the Phase One exams are submitted by 11:59pm ET on the established due date.

If you are a WIPA CWIC and are unable to meet deadline identified above, you are responsible for contacting your VCU Technical Assistance Liaison in advance of the submission deadline.
Your WIPA supervisor and Social Security Project Officer will be consulted to determine the next steps.

If you are a community partner staff person and do not submit the exams by the deadline identified above, you will not be eligible to continue participation in the certification process and you will not achieve Community Partner Work Incentives Counselor Certification.

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 the Module 7 competency assessment exam. Again, CWICs and community partners who do not receive a passing score on their first attempt of a Module 6 assignment and the Module 7 assessment will have a second attempt to achieve a passing score.

**Important Information on Second Attempts:** Your second attempt is your final opportunity to achieve a passing score on each of the assignments/exam. **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.**

Specific information on the deadline 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 a CWIC does not achieve a passing score on the second attempt, we will schedule a conference 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>Assignments Due</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>
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<tr>
<td>Week 7</td>
<td>Scoring completed and results posted in grade book</td>
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**Important:** It is your responsibility to ensure that each Phase Two assignment is submitted by 11:59pm ET on the due date indicated above.

If you are a WIPA CWIC and are unable to meet deadlines identified above, you are responsible for contacting your VCU Technical Assistance Liaison in advance of the due date. Your WIPA supervisor and Social Security Project Officer will be consulted to determine the next steps.
If you are a community partner staff person and do not submit the assignments and exam by the deadline identified above, you will not be eligible to continue participation in the certification process and you will not achieve Community Partner Work Incentives Counselor Certification.

**How Will I Access the Assessment Tools and Information?**

Part I 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/or 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. Additionally, it is strongly recommended that your supervisor 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 I 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 I assessments. We will also provide detailed information on the Part II assessment and certification process in this email communication.

Please note that you will not achieve certification until you successfully complete both the Part I and Part II assessment requirements. We provide you with a certificate upon successful completion of Part II of the certification process.