



2019 CWIC Initial Training

AGENDA

DAY ONE

8:00 – 8:40	Welcome and introductions Review of agenda and initial training manual
8:40 – 9:20	Introduction to the WIPA Program and Role of the Work Incentives Counselors Role
9:20 – 9:45	Outreach under the WIPA service model
9:45 - 10:00	Break
10:00 – 11:00	Orientation to Social Security Administration Definition of disability Continuing Disability Reviews (CDRs) Section 301
11:00– 11:15	Appeals and Overpayments
11:15 – 11:45	Overview of Title II disability benefits
11:45 – 1:00	Lunch on your own
1:00 – 2:00	Trial Work Period (TWP) TWP exercise Understanding Substantial Gainful Activity (SGA)
2:00 – 2:10	Break
2:10-2:50	Subsidies and Special Conditions Subsidy exercise
2:50- 3:25	Impairment Related Work Expense (IRWE) IRWE exercise
3:25 -3:30	Mini-Break
3:30 – 4:30	Income Averaging Unsuccessful Work Attempt (UWA)

DAY TWO

8:00 – 8:45	Debrief homework and review material from Day 1
8:45 – 9:45	Cessation Month/Grace Period Extended Period of Eligibility (EPE) EPE exercise/Demonstration
9:45 – 9:55	BREAK
9:55 – 10:15	Expedited Reinstatement (EXR) Demonstration
10:15 – 10:55	Exercise # 5; Zoey Part A
10:55 – 11:00	Mini-break
11:00 – 12:00	Ticket To Work
12:00 – 1:15	LUNCH on your own
1:15 – 2:15	Understanding Medicare Extended Period of Medicare Coverage (EPMC) Premium HI Coverage
2:15 – 2:25	BREAK
2:25 – 3:00	Counseling beneficiaries about employer-provided insurance
3:00 – 3:20	Exercise # 5 Part B, Zoey
3:20 – 3:25	Mini Break
3:25- 3:50	Practice quiz
3:50 – 4:30	Accessing Online Resources

DAY THREE

8:00 – 8:45	Debrief homework and review of Day 2
8:45 – 9:50	Understanding Supplemental Security Income (SSI) <ul style="list-style-type: none">• Income and SSI• Resources and SSI
9:50 – 10:00	Break
10:00– 11:00	Deeming In-Kind Support and Maintenance (ISM) Eligible couples
11:00-11:05	Mini Break
11:05–11:30	SSI Calculations
11:30 – 12:00	Student Earned Income Exclusion (SEIE) SEIE Exercise
12:00-1:15	Lunch on your own
1:15 – 2:00	Impairment Related Work Expense (IRWE) IRWE exercise Blind Work Expenses (BWE) BWE Exercise
2:00 – 2:10	Break
2:10 – 3:25	Plan for Achieving Self Support (PASS)
3:25– 3:30	Mini-break
3:30 – 3:35	PASS Continued PASS Exercise
3:40 – 4:05	Working With Concurrent Beneficiaries Concurrent Exercises
4:05 – 4:30	Exercise 5, Part C; Zoey

DAY FOUR

8:00 – 8:45	Debrief homework and review of Day 3
8:45 – 9:50	Understanding Medicaid – eligibility and covered services Special Medicaid Beneficiaries Medically Needy or Spend-Down Program
9:50 – 10:00	BREAK
10:00 – 10:55	Medicaid Buy-In Programs Home and Community-Based Services (HCBS) Waivers State Child Health Insurance Program (SCHIP)
10:55-11:00	Mini Break
11:00 – 12:00	Medicare Saving Programs (MSP) Low Income Subsidy (LIS)
12:00 – 1:15	LUNCH on your own
1:15 – 1:40	Practice Quiz
1:40-2:20	Exercise #5, Part D; Zoey
2:20 – 2:30	Break
2:30 - 3:10	Eligibility for WIPA services Eligibility Exercise
3:10 – 3:15	Mini Break
3:15 – 4:30	Prioritization of Eligible Referrals Prioritizing Exercise

DAY FIVE

8:00 – 8:20	Providing Information & Referral (I&R) Services
8:20 – 8:50	Information gathering Working with Representative Payees and Guardians
8:50 – 9:40	Verifying benefits and using BPQY reports Reading BPQY exercise
9:40 – 9:50	BREAK
9:50 – 10:40	Developing individualized Benefits Summary & Analyses (BSAs)
10:40 – 10:45	Mini Break
10:45 – 11:45	Developing a BSA Planning Sheet Exercise
11:45 – 12:30	LUNCH on your own
12:30 – 1:00	Tips for writing the BS and A Review Sample BSA
1:00 – 1:40	Developing Work Incentives Plans (WIPs) Review Sample WIP
1:40 – 1:55	BREAK
1:55 – 3:10	Providing work incentives management services and ongoing follow-up Follow up exercise
3:10 – 3:30	Next steps