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

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tr>
<td>8:00 – 8:45</td>
<td>Debrief homework and review material from Day 1</td>
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| 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)
  • 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