



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

January 2023

Congratulations on your successful completion of all Part I assessment activities (exams and practical exercises)! Your successful completion of the Part I Assessments means two important things:

- First, if you are a WIPA CWIC, you are now **qualified** to begin providing direct Work Incentive Planning and Assistance (WIPA) services to Social Security beneficiaries. (Note: WIPA staff must also have the required security clearance before beginning to serve beneficiaries.)
- Secondly, for all participants, your successful completion of the Part I assessments means you are now eligible to begin Part II of the assessment and certification process. Part II is the final step in achieving CWIC or Community Partner certification.

WIPA CWIC Part II Requirements:

Part II of the CWIC certification process requires the following two activities:

1. Submission and successful review of three Benefits Summary & Analysis (BS&A) reports; and
2. Successful completion of the Providing Effective Work Incentives Supports on Other Federal Benefit Programs web course.

Community Partner Part II Requirements:

Part II of the Community Partner Work Incentives Counselor certification process requires submission and successful review of three Benefits Summary & Analysis (BS&A) reports. There are no training completion requirements for community partners in the Part II process.

WIPA CWICs and community partners will only be granted certification following successful completion of the above noted requirements. If you do

not submit three BS&As by the due dates indicated below and do not successfully complete the Part II BS&A requirements as outlined in this document, you will not be certified.

For both WIPA staff and community partners, this document provides important, detailed guidelines for the development and submission of the BS&A reports, including required timeframes for submission. Please review the information carefully before beginning and contact your assigned VCU grader with any questions you may have.

Note: The BS&A reports you submit must be developed exclusively through your own work. You are not permitted to work with other certified CWICs or colleagues, including you co-workers or supervisor, to complete the reports. If it is determined that a participant has not submitted their own independent work on the BS&A, 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 Part II of the assessment and certification process, please contact Julie Schall as soon as possible to discuss details and make necessary arrangements. You must notify VCU NTDC staff of any accommodation or support requests in advance.

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Instructions for Development and Submission of Your Benefits Summary & Analysis Reports

Part II of the assessment and certification process tests your ability to apply the concepts contained in Unit 3 of Module 6 in the [training manual](#) related to developing written BS&A reports. While your ability to apply these concepts was tested in Part I using a standard case study, Part II of the certification process takes the assessment process to the next level by evaluating your ability to apply the concepts in developing BS&A reports for actual Social Security beneficiaries you are serving.

For each of the BS&A reports that you will submit, you are required to select a beneficiary whom you are serving in the performance of your employment

duties. This means that you will select three separate Social Security beneficiaries and submit a BS&A report for each of them.

In order to evaluate your progress in learning and applying the BS&A concepts, you are required to submit one BS&A at a time, and to achieve a passing score on each BS&A before moving to the next. Specifically, the timeframe for submission of BS&A reports is as follows:

Part II BS&A Submission Calendar

Quarter 1	BS&A Submission #1 Due
Quarter 2	BS&A Submission #2 Due
Quarter 3	BS&A Submission #3 Due

Please note that the timeframes listed above are deadlines for submission of your BS&A reports. It is not a requirement that you wait for these dates to submit your reports. You may submit each of your three BS&A reports prior to these deadlines, however, please remember that you must be notified that you have achieved a passing score on any previous BS&A submissions before submitting your next report.

Important: It is your responsibility to ensure that each of your three BS&As is submitted by the deadline indicated. You should choose the case study that you plan to submit at least one month in advance of the BS&A due date in order to have time to obtain the BPQY, and verify all other benefits received.

If you are a WIPA CWIC and are unable to meet one of more of the submission deadlines identified above, you are responsible for contacting your VCU grader **at least two weeks prior to the due date**. We will provide due date extensions for WIPA staff awaiting their security clearance.

If you are a community partner staff person and do not submit your BS&A reports by the deadlines provided, you will not be eligible to continue participation in the certification process and you will not achieve Community Partner Work Incentives Counselor Certification.

Guidelines for Selecting the Beneficiary Cases

You must take careful consideration when selecting the cases you will use for this assignment. Please comply with the following requirements when choosing the three cases to submit.

You must meet all of the following requirements:

- These must be real cases that you are working on or have worked on since completing Part I of the certification process.
- The beneficiary that you select for each of the three BS&A reports must be either WIPA Priority Group 1 – currently working, or WIPA Priority Group 2 – actively pursuing employment. Beneficiaries in Priority Group 2 have a clear employment goal and are conducting an active and regular job search or have taken active steps to prepare for achieving their employment goal. Additionally, you **MUST** state the beneficiary's wage goal in the BS&A. Do not select cases in which the beneficiary is self-employed or pursuing self-employment for submission. For additional detail on the WIPA priority groups, please refer to Module 6 – Unit 3 of the training manual.
- At a minimum, at least one of the cases you select must involve an SSI only beneficiary, one case must involve a Title II disability only beneficiary, and one case must involve a concurrent beneficiary.
- The case involves anticipated or actual use of work incentives.

In addition to meeting all of the above requirements, the case must contain at least one of the following additional complexities:

- The beneficiary receives some form of other federal, state, or local benefits in addition to Social Security disability benefits, Medicare, and SSI-related Medicaid;
- There was/is current or anticipated involvement with an employment service provider (American Job Center, state VR agency, Employment Network, Community Rehabilitation Program, etc.); or
- The beneficiary has a specific benefits issue that you assisted the beneficiary to resolve.

Guidelines for Preparing the BS&A Reports

Once you have chosen an appropriate case for each of your submissions based on the above guidance, please comply with the following directions in the preparation of your BS&A reports:

- It is **recommended**, but not required, that you use the [BS&A format](https://vcu-ntdc.org/resources/viewContent.cfm?contentID=92) (https://vcu-ntdc.org/resources/viewContent.cfm?contentID=92) that is available on the NTDC website. We recommend that you use this format to help ensure that all areas being graded are covered. If you choose to use an alternative format, please keep in mind that the VCU

NTDC staff grading your BS&A must be able to find the information in each section of the grading rubric provided later in this document. Additionally, you will be graded on organization of the material.

- All three of the BS&A reports you submit must have been developed exclusively through your own work. You are not permitted to work with other colleagues or your supervisor to complete this assignment or to submit a case which you did not develop.
- Both content and style count in this assessment. Please check your sentence structure, grammar, and spelling before you submit your final report. This assignment should represent your very best professional writing abilities.
- You must include a section that describes ALL types and amounts of benefits received and how those benefits were verified in your BS&A. In addition, you will need to submit an intake form and BPQY or other verification documentation for Social Security benefits. All verification forms that you are able to secure for other benefits received should be submitted as well. **You must redact all personally identifying information (PII) on these documents before submitting!**
- You must include SSI calculation sheets and/or Title II charts to illustrate the impact of wages on benefits based upon the beneficiary's stated occupational goal.
- If you included pamphlets, fact sheets or any other handouts to supplement the information in the BS&A, you must clearly identify these within the narrative of the report.
- If you have questions about any of the directions or guidance provided on case selection or BS&A report development, you should contact your assigned instructor.

Guidelines for Submitting Your BS&A Reports

- It is imperative that you redact all identifying demographic information (name, Social Security number, address) from all documents submitted!
Do not send copies of paycheck stubs or any other personal information or correspondence related to the beneficiary.
- You are required to submit your BS&A reports and all accompanying required documents electronically through your myNTC account. You may only submit one BS&A report at a time. Once you receive a passing score (80% or higher) on a BS&A, you may submit the next one.

Your instructor will receive an email once your documents are submitted. You will receive an email with further instructions once your instructor evaluates and grades your submission.

The instructions for submitting your BS&A reports are as follows:

1. Login to your [myNTC account](https://vcu-ntdc.org/myntc/login/login.cfm) (https://vcu-ntdc.org/myntc/login/login.cfm)
2. Click on the "Initial Training and Certification" button toward the bottom of your myNTC page
3. Click on the BS&A tab for the BS&A you are submitting (1, 2 or 3).
4. Add any comments to your instructor in the "Notes" text box
5. Click on the "Choose file" button next to the "Please upload BS&A here:"
6. Select the BS&A document in the folder on your computer and click "Open"
7. Click on the "Choose file" button next to the "Please upload Intake here:"
8. Select the Intake document in the folder on your computer and click "Open"
9. Click on the "Choose file" button next to the "Please upload BPQY here:"
10. Select the BPQY document in the folder on your computer and click "Open"
11. Click on the "Choose file" button next to the "Please upload TWP/EPE Tracking Chart or SSI Calculation Sheet as appropriate here:"
12. Select the appropriate document in the folder on your computer and click "Open"
13. If you have any additional documents to submit, continue submitting documents as you did in #11 and #12 above. Continuing adding documents until all documents are uploaded. If you want to remove your previously added document, click on the "Delete file" link to the right of the file you uploaded.
14. Check the box to confirm no PII information was included in your uploaded documents.
15. *When you are ready to submit, click on the "Submit" button.

***NOTE:** Once you click on the "Submit" button, you will not be able to upload any more documents or make any additional changes to the BS&A and other documents submitted. Upload access will no longer be available, so please check carefully to ensure you are submitting all documents required and the correct version of each document.

If you have questions or would like more information, please contact your instructor.

How Your Work will be Evaluated and Scored

The passing score for all three of the BS&A submissions is 80%.

Your VCU grader will review your BS&A report and assign up to the maximum points allowable for each of the following criteria:

BS&A Content Criteria

BS&A Content Criteria (possible 65 points)	Points
Verification of current benefits with Social Security and other agencies.	6
Description of current employment situation and/or future employment plans and earnings goal.	6
Description of how the current employment situation and/or future earnings goal will affect Social Security cash benefits.	16
Description of how the current employment situation and/or future earnings goal will affect public health insurance (Medicare and/or Medicaid).	16
Description of at least one of the following: <ul style="list-style-type: none">• Employment services and supports the beneficiary may need to maintain current employment or attain the future earnings goal;• How the current employment situation and/or future earnings goal may affect other benefits received (SNAP, HUD rental subsidies, etc.);• Specific benefits issue that you assisted the beneficiary to resolve.	16
Important things to remember or next steps (important dates or deadlines, reporting, record keeping).	5

Criteria Related to Effectiveness of Information Presentation

Criteria Related to Effectiveness of Information Presentation (possible 35 points)	Points
The BS&A includes individualized, case specific information about how the earnings goal will affect benefits and provides specific recommendations about relevant work incentives or provisions that the beneficiary may utilize now or in the future to increase the benefit of working or ease the transition from reliance upon benefits to greater self-sufficiency.	10
Content is presented in a logical, sequential order. The report does not mix unrelated topics together in the same paragraph or section and does not switch back and forth between unrelated topics in a confusing manner. Material is presented in the appropriate section.	5
Sample SSI calculation sheets and TWP/EPE tracking charts are attached as needed and correctly identify the impact of wages on benefits or work incentive usage.	10
The narrative is sufficient to address the presenting issues, but not too long, unnecessarily detailed, or repetitious. Content is presented in a concise manner.	5
The BS&A is written in clear and understandable language. Acronyms are not used unless explained. Sentence structure, grammar and spelling are correct.	5

Summary of Possible Points

Summary of Possible Points	Points
BS&A Content Criteria (possible 65 points)	65
Criteria Related to Effectiveness of Information Presentation (possible 35 points)	35
TOTAL	100

Within two weeks from receipt of your submission of each BS&A report, you will receive an email notifying you that your VCU grader has graded your

submission and provided you with your score and written feedback on your work in your myNTC account. If you achieve a passing score on your first submission, you may move forward on development of your next BS&A report.

If, however, you do not achieve a passing score on your first submission, you will be provided an opportunity to revise the BS&A and accompanying documents and submit again through your myNTC account.

Since you are provided with only two attempts to achieve a passing score on each of the BS&A reports, it is imperative that you review the written feedback provided on your first attempt and contact your assigned VCU grader to debrief and address any questions you may have before moving forward with your second attempt.

You will have one week from the date that your grade and feedback are provided on your submission to revise and submit your final attempt. Again, your final attempt must be submitted through your myNTC account.

If you are a WIPA CWIC and do not achieve a passing score on your final attempt, a conference call will be scheduled to discuss additional supports and next steps. You, your VCU grader, your supervisor, and your Social Security Project Officer will be involved in the discussion.

If you are a community partner staff person and do not achieve a passing score on your final attempt, you will not be eligible for certification. Your participation in the assessment and certification process will end at this point in time, and to pursue 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 that class.

If you are a WIPA CWIC, certification will be granted as soon as you have submitted and achieved a passing score on all three of the required BS&A reports, and completed the "Providing Effective Work Incentives Supports on Other Federal Benefit Programs" web course. We will notify you by email of your certification status within 15 days of completing all of the requirements.

If you are a community partner, certification will be granted as soon as you have submitted and achieved a passing score on all three of the required BS&A reports. We will notify you by email of your certification status within 15 days of successfully completing your third BS&A report.