



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

January 2024

To be fully certified to provide work incentives planning and assistance services to Social Security beneficiaries, Work Incentive Planning and Assistance (WIPA) project staff and subcontractors must participate in the distance Initial Training sessions and successfully complete the two-part assessment process.

The assessments evaluate your initial proficiency in each of the main competency areas addressed in the [WIPA & Community Partner Work Incentives Counseling training manual](https://vcu-ntdc.org/resources/ntcmanual.cfm) (<https://vcu-ntdc.org/resources/ntcmanual.cfm>) and taught during the initial training webinars. There are two parts to the certification process, including:

- **Part I:** Part I of the certification process involves completing a series of online competency-based assessments. This document includes detailed information about the Part I assessments and due dates. For all participants, successful completion of the assessments results in the authorization to continue on to Part II of the certification process.

WIPA Community Partner Work Incentive Coordinators (CWICs) can begin providing services to Social Security beneficiaries after successful completion of the Part I assessments. (**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 Part I assessment 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.

Part I of the CWIC and Community Partner Certification Process

Part I of the certification process is comprised of 12 separate assessments. Nine of the assessments are multiple choice and true/false questions. The online learning platform automatically grades those assessments when you submit them. Three of the assessments require you to create a written document. The VCU NTDC staff grade these three assessments.

To complete Part I of the certification process, all training participants (CWICs and community partners) are required to achieve a passing score of 80% on each assessment. If you do not achieve a passing score on your first submission, you will have an opportunity to retake the assessment(s).

Part I Assessments

The table below lists each of the Part I assessments, how they correspond with the competency areas and chapters in the training manual, and the details about each one.

Assessment	Competency Areas Covered	Assessment Details
1	Chapter 1: Understanding Social Security Disability Benefits	20 questions
2	Chapter 2: Understanding Medicare	20 questions
3	Chapter 3: Understanding Supplemental Security Income (SSI) and Chapter 4: Plans to Achieve Self-Support	20 questions
4	Chapter 5: Understanding Medicaid	20 questions
5	Chapter 6: Understanding Concurrent Beneficiaries and Chapter 7: Social Security Determinations, Medical CDRs, Appeals and Overpayments	20 questions

Assessment	Competency Areas Covered	Assessment Details
6	Chapter 8: Effect of Work on Other Common Benefits and Chapter 9: Community Relations and Education	20 questions
7	Chapter 10: Managing Initial Requests for WIPA Services and Chapter 11: Providing I&R Services	20 questions
8	Individualized WIPA Services: Chapter 12: Intake Services and Benefits Verification and Chapter 13: Performing Benefits Analysis and Developing BS&A Reports	20 questions
9.1	Individualized WIPA Services: Benefits Analysis and Planning for Benefits Summary and Analysis (BS&A) Report	Submission of a written Benefits Summary & Analysis (BS&A) Report Planning Sheet based on a case study
9.2	Individualized WIPA Services: Development of Benefits Summary and Analysis (BS&A) Report	Submission of a written BS&A Report based on a case study
9.3	Individualized WIPA Services: Planning Follow-up Services through development of a Work Incentives Plan	Submission of a Work Incentives Plan based on a case study
10	Individualized WIPA Services: Chapter 14: Supporting Beneficiaries to Manage Benefits and Chapter 15: Providing Follow-Up Services	20 questions

Part I Assessment Due Dates

The table below lists the dates for each assessment, including the date the assessment is open, the first attempt due date, and the second attempt due date.

Assessment	Opens	1 st Attempt Due Date	2 nd Attempt Due Date
1	[based on class]	[based on class]	[based on class]
2	[based on class]	[based on class]	[based on class]
3	[based on class]	[based on class]	[based on class]
4	[based on class]	[based on class]	[based on class]
5	[based on class]	[based on class]	[based on class]
6	[based on class]	[based on class]	[based on class]
7	[based on class]	[based on class]	[based on class]
8	[based on class]	[based on class]	[based on class]
9.1	[based on class]	[based on class]	3 full business days after 1 st attempt grade is posted
9.2	[based on class]	[based on class]	3 full business days after 1 st attempt grade is posted
9.3	[based on class]	[based on class]	3 full business days after 1 st attempt grade is posted
10	[based on class]	[based on class]	[based on class]

Important Details About Part I Assessments:

- **Accommodations:** If you need an accommodation or any type of support to participate in and complete the Initial Training and assessment process, please contact Julie Schall as soon as possible to discuss support needs and make necessary arrangements. You must notify NTDC staff of any accommodations or support needs in advance. Please submit all requests to:

Julie Schall
jaschall@vcu.edu
804-827-0741

- **Grader and Technical Support:** The VCU NTDC will assign a member of the NTDC team to review and score each of the assignments you complete. This person will also be available to answer any questions you have about concepts covered in the Initial Training and the manual. In most instances, this person will also be the Technical Assistance (TA) Liaison for your region. Your assigned grader and technical support will serve as your primary point of contact for any questions you have during the assessment process.
- **Open Book:** All assessments are “open-book”. You can use your [training manual](https://vcu-ntdc.org/resources/ntcmanual.cfm) (<https://vcu-ntdc.org/resources/ntcmanual.cfm>) and other material from class when answering questions and completing assignments.
- **ONLY Your Work:** All assessment answers and assignments you submit must be developed exclusively through your own work. You are **NOT** permitted to work with anyone to complete the certification assessments. If it is determined that a participant has not submitted his or her own independent work on the assessments, he or she will not pass the assessment and will not be certified!
- **MUST Meet Due Dates:** It is your responsibility to ensure that you submit your assessments by 11:59 pm in your time zone on the due dates noted above.
 - If you are a WIPA CWIC and are unable to meet the deadline identified above, you are responsible for contacting your assigned grader in advance of the submission deadline. Your assigned grader will consult with your WIPA supervisor and Social Security Project Officer to determine the next steps.

- If you are a community partner staff and do not submit an assessment by the due dates listed above, you will not be eligible to continue participation in the certification process for this class and you will not achieve Community Partner Work Incentives Counselor Certification.
- **If Second Attempt is Needed:** Your second attempt is your final opportunity to achieve a passing score on each of the assessments. If you have questions related to the assessments or any feedback provided by your grader on your initial attempt, you should contact your grader to debrief before moving forward with your second attempt.
- **Failing to Achieve 80% within Two Attempts:** All training participants (CWICs and community partners) are required to achieve a passing score of 80%, within two attempts, on each assessment to successfully complete Part I of the certification process.
 - 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 grader 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 certification process will end. To pursue Community Partner certification later, it will be necessary to attend the Initial Training session once again and begin the certification process over with the new class.
- **Notification of Completion:** Your assigned grader will notify you via email as to whether or not you have successfully completed all Part I assessments. In the "successful completion" email, we will also provide detailed information on the Part II certification process. 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.

How Will I Access the Assessment Tools and Information?

The NTDC implements and manages Part I of the assessment and certification process using *Canvas*, an online learning platform. We will

email you with a username and password to access Canvas, as well as information on how to log into the course to access your Part I assessments.

If you need **assistance with Canvas**, please contact:

- Lauren Carraway
carrawayle@vcu.edu
757-202-7741
- Mary McAdam
mmcadam@vcu.edu
804-827-2884