

2014 CWIC Initial Training

A G E N D A

DAY ONE

8:00 – 8:45	Welcome and introductions Review of agenda Overview of manual
8:45- 9:45	Social Security’s commitment and role in supporting WIPA services for disability beneficiaries Understanding Social Security’s work initiatives and the role of financial stability
9:45– 10:00	BREAK
10:00- 10:30	Role of WIPA in promoting work and financial stability for beneficiaries
10:30-10:45	Outreach
10:45 –11:45	Orientation to Social Security Administration Definition of disability

Continuing Disability Reviews

11:45-1:00	LUNCH on your own
1:-00 – 1:30	Section 301 Appeals and Overpayments
1:30– 2:30	Overview of Title II disability benefits
2:30– 2:45	BREAK
2:45-4:30	Trial Work Period (TWP) Understanding Substantial Gainful Activity (SGA) Subsidies and Special Conditions

DAY TWO

8:00 – 8:45	Debrief homework and review material from Day 1
8:45– 10:00	Impairment Related Work Expense (IRWE) UWA Income Averaging

10:00– 10:15	BREAK
10:15– 12:00	Cessation Month/Grace Period Extended Period of Eligibility Expedited Reinstatement
12:00 – 1:15	LUNCH on your own
1:15 – 2:30	Understanding Medicare Part B Medicare Savings Programs Part D Low Income Subsidy
2:30 – 2:45	BREAK
2:45 – 3:15	Extended Period of Medicare Coverage (EPMC) Qualified Disabled Working Individual
3:15-4:00	Counseling beneficiaries about employer-provided insurance
4:00 – 4:30	Practice quiz

DAY THREE

8:00 – 8:45	Debrief homework and review of Day 2
8:45 – 10:30	Understanding Supplemental Security Income (SSI) <ul style="list-style-type: none"> • Income and SSI • Resources and SSI • Deeming • In-Kind Support and Maintenance (ISM) • Eligible couples
10:30 – 10:45	BREAK
10:45 –11:15	SSI Calculations
11:15-12:15	Student Earned Income Exclusion (SEIE) Impairment Related Work Expense (IRWE) Blind Work Expenses (BWE)
12:15 – 1:30	LUNCH on your own
1:30 – 3:00	Understanding Plans for Achieving Self-Support (PASS)
3:00 – 3:15	BREAK
3:15-4:00	PASS, continued

- 4:00 – 4:30 Individual Development Accounts
- IDAs and SSA disability benefits
 - IDAs and PASS
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DAY FOUR

- 8:00 -8:45 Debrief homework and review of Day 3
- 8:45- 10:30 Understanding Medicaid – eligibility and covered services
- Special Medicaid Beneficiaries
- Medically Needy or Spend-Down Program
- Home and Community-Based Services (HCBS) Waivers
- Medicaid Buy-In Programs
- State Child Health Insurance Program (SCHIP)
- 10:30 – 10:45 BREAK
- 10:45 – 11:15 Understanding concurrent beneficiaries
- 11:15 – 11:45 Practice Quiz

11:45 – 1:00 LUNCH on your own

1:00 – 2:45 Zoey exercise

2:45 – 3:00 BREAK

3:00 – 4:00 Ticket to Work

4:00 – 4:30 Debrief Day 4

DAY FIVE

8:00 – 9:15 Eligibility for WIPA services
Managing initial requests for work incentives counseling
Conducting initial intake interviews

9:15 – 10:00 Verifying benefits – using the BPQY

10:00 – 10:15 BREAK

10:15 – 12:00 Developing Benefits Summary & Analysis (BS&A)

12:00 – 1:15 LUNCH on your own

1:15- 2:00	Developing Work Incentive Plans (WIP)
2:00-2:15	Break
2:15 – 3:00	Providing work incentives management services and ongoing follow-up
3:00 – 3:30	Next steps Evaluations