



Introduction

Work Incentives Planning and Assistance (WIPA) is an integral part of SSA strategy to promote employment among SSA beneficiaries, reduce dependence on SSI and SSDI cash benefits, reduce the number of burdensome overpayments and other post entitlement problems experienced by beneficiaries engaged in employment, and decrease trust fund and general fund expenditures by reducing cash payments to beneficiaries. Authorized by Section 121 of the Ticket to Work and Work Incentive Improvement Act of 1999, 103 WIPA projects are providing services to SSA beneficiaries in all 50 states and territories. Collectively, the 103 projects employ over nearly 500 Community Work Incentive Coordinators (CWICs), many of whom are themselves individuals with disabilities, and have served over 350,000 individuals since the program's inception in 2000.

The mission of the WIPA program is to provide timely and accurate information to beneficiaries on SSA's work incentives and other Federal efforts to remove regulatory and programmatic barriers to employment for persons with disabilities. To achieve this purpose, the program uses a highly skilled and rigorously trained cadre of CWICs to provide individual counseling to beneficiaries seeking employment and intensive follow-up services to ensure that the beneficiaries are using the work incentives appropriately, that they have been connected to employment service programs in their community, and that they are communicating their work activities to the Social Security Administration. CWICs in local WIPA programs work with individual beneficiaries to explain the myriad of regulations, provisions, work incentives and special programs that complicate an individual's decision to enter or reenter the workforce.

The questions posed to benefits specialists by beneficiaries are basic and straightforward. What will happen to my benefit check if I return to work? I want to start my own business – is this possible if I receive SSA benefits? I am currently working and got a letter from SSA indicating that I have been overpaid and have to pay back money – can you help me? I want to start a new career – where should I begin? As simple and basic as these questions are, their answers are often complex and highly individualized. Even more frustrating to beneficiaries is the overwhelming amount of confusing and inconsistent information they often receive from SSA field offices, Employment Networks, Vocational Rehabilitation and other agencies involved in the employment process. This sea of misinformation makes employment seem a perilous and terrifying undertaking and lessens the resolve of many beneficiaries to pursue their career goals.

The WIPA program is designed to fill this information void by providing beneficiaries access to complete, individualized information from a trained professional in a confidential setting apart from SSA. SSA field office staffs, overwhelmed with processing current disability claims, are simply unable to provide this level of intensive services. Armed with an understanding of the impact of employment on their benefits, beneficiaries can confidently pursue employment options, maintain health care coverage, and obtain necessary employment supports and services. With the help of work incentive planning and assistance, beneficiaries can take charge of their own careers without the constant worry that the application of an unknown rule or a mistake by a caseworker will jeopardize their ability to pay for their basic needs or treat their health conditions.

THE ROLE OF CWICs IN THE WIPA PROGRAM

The foundation of the WIPA program is the national cadre of highly skilled and rigorously trained Community Work Incentive Coordinators (CWICs). CWICs complete a demanding preparation and certification program and participate in an intensive program of ongoing technical assistance and training. These dedicated professionals are using their knowledge, skill, and personal experience to assist other persons with disabilities to navigate the maze of SSA work incentives and regulations to obtain employment and maximize their economic self-sufficiency. CWICs are not peer counselors or trained volunteers. They are a group of highly trained professionals dealing with extremely technical information in a way that makes sense to beneficiaries and allows them to pursue their career goals.

All WIPA project personnel (CWICs) providing direct services to beneficiaries are required to successfully complete a highly challenging training and certification process. The CWIC Initial Certification process consists of four components:

Component 1 -- First, CWICs participate in a 32-hour Face-to-Face Training Class. The training class addresses each of the training competencies found in the National Training Curriculum. Ten to twelve Initial Training classes are conducted each year.

Component 2 -- CWICs engage in extensive self-study activities to prepare for and complete the required CWIC certification assessments. Self-study activities include review of the National Training Curriculum, review of other resource documents, and study calls moderated by the NTC trainers. Data reported by CWICs completing the certification process revealed that on average they spend approximately 25 hours completing the self-study activities.

Component 3 -- CWICs are required to complete six competency-based assessments that address each of the major training modules of the National Training Curriculum. Assessments are conducted entirely online using the Blackboard Learning System and consist of objective test items, essay responses, and case studies. CWICs reported spending approximately 20 hours completing the six assessments.

Component 4 -- Finally, CWICs completing the certification process are enrolled in the NTC Supplemental Training and Technical Assistance Activities. The activities include face-to-face and online training, and individual, state, and regional technical assistance. The NTC estimates that CWICs receive approximately 50 hours of technical assistance in the first year post certification and participate in an additional 25 hours of supplemental training events.

THE STRUCTURE OF THE NATIONAL TRAINING CURRICULUM

The National Training Curriculum is the foundation of all CWIC training and certification activities. The training activities and content contained in the Curriculum are based upon a comprehensive set of competencies that CWICs must acquire in order to be certified to provide work incentives planning and assistance services to SSA beneficiaries. The SSA approved competencies have been grouped into six distinct competency areas. These training modules are identified and briefly described below.

Major CWIC Competency Areas

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1. Promoting and Supporting Employment Outcomes for SSA Beneficiaries with Disabilities
2. Partnering with Community Agencies and Conducting Community Outreach
3. Understanding Social Security Disability Benefits, Other Federal/State/Local Benefits, and Associated Work Incentives
4. Providing Healthcare Planning and Counseling
5. Conducting Quality Assurance/Continuous Quality Improvement Activities
6. Providing Effective Work Incentives Planning and Assistance Services

Competency Area 1: Promoting and Supporting Employment Outcomes for SSA Beneficiaries with Disabilities

This module focuses on recent governmental efforts to increase community-based paid employment and current best practices in employment services, as well as SSA's efforts to promote employment and increase self-sufficiency for disability beneficiaries with an emphasis on the Ticket to Work and Self-Sufficiency Program.

Content will address eligibility criteria, referral procedures, and services available from various entities such as state Vocational Rehabilitation Agencies; One-Stop Centers and the Disability Program Navigator Initiative; and other employment programs or key stakeholders in the disability services system. The role of the CWIC in promoting employment for SSA beneficiaries is described in detail.

Competency Area 2: Partnering with Community Agencies and Conducting Community Outreach

This module begins with an explanation of how WIPA projects should work in collaboration with the Program Manager for Recruitment and Outreach or PMRO, primarily in conducting Work Incentives Seminar Events (WISE). The subsequent units focus on providing effective outreach and will include activities that target both Ticket-eligible SSA beneficiaries and other SSA disability beneficiaries in the geographic area (in addition to WISE seminars), as well as outreach activities designed for community agencies, stakeholder groups, and partner agencies. The module also addresses strategies CWICs can use to work collaboratively with other public and private community-based organizations such as SSA Field Offices, Employment Networks, DOL One-Stop Career Centers, State Vocational Rehabilitation (VR) Agencies, Public Schools, Mental Health organizations, and IDA/Asset Building organizations.

Competency Area 3: Understanding Social Security Disability Benefits, Other Federal Benefits, and Associated Work Incentives

This module is divided into two parts. Part A presents detailed information on the Title II and Title XVI disability programs and how wage employment affects eligibility for benefits, cash payment amounts, and Medicare and Medicaid Coverage; the impact of earned income on SSI and Title II disability benefits for concurrent beneficiaries; the effect of Net Earnings from Self-Employment (NESE) on SSI cash payments, DI cash payments and concurrent beneficiaries. Part B focuses on the impact of employment on other Federal benefit programs and associated work incentives, such as the USDA Food Stamp program, HUD housing subsidies and specialized housing programs, TANF, Workers' Compensation, Unemployment Insurance benefits, and Veteran's Administration benefits.

Competency Area 4: Providing Healthcare Planning and Counseling

This module provides CWICs detailed information on the availability of and eligibility for Medicaid programs, optional Medicaid groups, Medicaid buy-in programs, Medicaid waiver programs, Medicare Savings Programs, Special Medicaid Beneficiaries, Children's Health Insurance Program (CHIP), eligibility for and the operations of the Federal Medicare program, availability of alternate health insurance coverage options (employer sponsored health plans and private plans for small self-employed individuals), and Federal legislation protecting the health care rights of persons with disabilities (i.e., HIPAA and COBRA).

Competency Area 5: Conducting Quality Assurance/Continuous Quality Improvement Activities

This module outlines procedures for determining quality indicators and standards for all WIPA core services; developing and implementing strategies to ensure that all information provided to beneficiaries is accurate, complete, and verified; obtaining satisfaction feedback from beneficiaries and partner agencies; developing and implementing procedures to ensure that all beneficiaries are served regardless of age, primary disability, primary language, or geographic location of residence; collecting and maintaining partici-

part demographic and service data based upon quality indicators and quality standards; identifying areas in need of improvement; and planning for and implementing changes to improve service quality.

Competency Area 6: Providing Effective Work Incentives Planning and Assistance Services

This module addresses the practical application of public benefits and work incentives knowledge, including identifying eligible beneficiaries and prioritizing initial contacts; conducting initial intake interviews; developing written Benefits Summary & Analysis documents, preparing written Work Incentives Plans; facilitating the use of necessary and appropriate work incentives; adhering to ethical standards; providing WIPA services that fully comply with the Americans with Disabilities Act and the Rehabilitation Act; and delivering services that are sensitive to linguistic and cultural differences.

THE WIPA NATIONAL TRAINING CENTER AT VIRGINIA COMMONWEALTH UNIVERSITY

The WIPA National Training Center (NTC) at Virginia Commonwealth University (VCU) is a collaborative effort of partnering agencies and national consultants responsible for implementing a comprehensive program of training and technical assistance to Community Work Incentives Coordinators (CWICs) in support of SSA's national Work Incentives Planning and Assistance (WIPA) initiative.

WIPA NTC services are coordinated and administered by Susan O'Mara, the Center's Director. Training and technical assistance activities are provided through our national network of technical assistance liaisons. These liaisons are identified below.

SSA Region 1:	Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont	Ray Cebula -- 617-312-3261 rac79@cornell.edu
SSA Region 2:	New York, New Jersey, Puerto Rico, US Virgin Islands	Connie Ferrell -- 765-352-9448 cferrell_connie@yahoo.com
SSA Region 3:	Delaware, Maryland, Pennsylvania, Virginia, West Virginia, DC	Laura Coffey Richardson -- 407-859-7767 lcoffey6@hotmail.com
SSA Region 4:	Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee	Lucy Miller -- 502-899-1391 lamiller@vcu.edu or laxmill@bellsouth.net
SSA Region 6:	Arkansas, Louisiana, Oklahoma, New Mexico, Texas	Sandy Smith -- 325-677-0767 pn3381@aol.com
SSA Region 5:	Ohio, Michigan, Illinois, Indiana, Wisconsin, Minnesota	Connie Ferrell -- 765-352-9448 cferrell_connie@yahoo.com
SSA Region 7:	Iowa, Kansas, Missouri, Nebraska	Dalia El-Khoury -- 804-827-0756 delkhoury@vcu.edu
SSA Region 8:	Colorado, Montana, North Dakota, South Dakota, Utah, Wyoming	Laura Coffey Richardson -- 407-859-7767 lcoffey6@hotmail.com
SSA Region 9:	Arizona, California, Nevada, Hawaii, territories of Guam, American Samoa, and Northern Mariana Islands	Sandy Smith -- 325-677-0767 pn3381@aol.com
SSA Region 10:	Alaska, Idaho, Oregon, Washington	Molly Sullivan -- 503-703-3650 msullivan@griffinhammis.com

To implement this large-scale program, VCU has partnered with a group of nationally recognized organizations to assist in the performance of project activities.

Imagine Enterprises is a nationally recognized leader in the delivery of training and technical assistance on SSA Work Incentives, supported employment, transition from school, and self-determination techniques for people with disabilities.

The World Institute on Disability (WID) is an internationally recognized research, public policy and advocacy center dedicated to promoting the civil rights and full societal inclusion of people with disabilities.

Cornell University Employment and Disability Institute (EDI) has lead the national effort to promote work incentive planning and assistance services to beneficiaries long before the passage of the Ticket to Work legislation in 1999 and currently operates a large number of state, regional and national projects that support the employment of SSA beneficiaries.

Griffin-Hammis Associates is an internationally recognized consulting firm with extensive expertise in the understanding and implementation of SSA Work Incentives and their impact on other public benefits, wages, and net earnings from self employment (NESE).



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Lucy Miller of the VCU NTC coordinates the overall development of the manual and has authored much of the content in several modules. Without her indefatigable spirit and management skills, the manual could not have been completed.

Susan O'Mara, the NTC Project Director, provides oversight to all aspects of Center operations and is integral to all our success. She works tirelessly with OESP, other Federal partner agencies, other national resource centers, WIPA projects, numerous CWICs and individual beneficiaries to ensure that all Center services are provided with accuracy, thoroughness, and professionalism.

Several other individuals served as coordinators of specific modules. Laura Coffey Richardson assumed a major responsibility for many parts of the manual. Sandy Smith, Connie Ferrell, Mary Ridgely, Barbara Butz, Bryon MacDonald, Mason O'Neal, Jennifer Eckel and James Sheldon all contributed major sections to the manual. Without the combined efforts and talents of these individuals, the manual would not be the valuable resource it is today.

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Finally, it is important to emphasize that the National Training Curriculum builds upon and directly uses previously developed information available in the public domain. In particular, much information was obtained from Supporting Career Development and Employment: Benefits Planning Assistance and Outreach (BPAO) and Protection & Advocacy for Beneficiaries of Social Security (PABSS) (Golden, O'Mara, Ferrell, Sheldon, J., & Miller, 2006), developed by the Employment and Disability Institute at Cornell University.

In this and other instances, care was taken to properly reference and acknowledge the source of information. The resulting WIPA National Training Curriculum reflects

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John Kregel
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