



# Introduction

Work Incentives Planning and Assistance (WIPA) is a key component of SSA's strategy to promote employment among beneficiaries and reduce dependence on SSI and SSDI cash benefits. Authorized by Section 121 of the Ticket to Work and Work Incentive Improvement Act of 1999, 102 WIPA projects are providing services to SSA beneficiaries in all 50 states and territories. Collectively, the 102 projects employ 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 affect an individual's decision to enter or reenter the workforce.

The questions posed to CWICs 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 received 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? The answers to these questions are often complex and always highly individualized. Even more frustrating to beneficiaries is the overwhelming amount of confusing and inconsistent information sometimes provided by SSA field offices, Employment Networks, Vocational Rehabilitation and other agencies involved in the employment process. This confusing mix of complex regulations and 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 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 and make employment and health care decisions based on accurate and complete information.

## THE ROLE OF CWICs IN THE WIPA PROGRAM

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The foundation of the WIPA program is the national cadre of highly skilled and thoroughly trained 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 beneficiaries to navigate the maze of SSA work incentives and regulations to obtain employment and maximize their financial independence. CWICs are not peer counselors or trained volunteers. They are a group of highly qualified 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 five 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 12 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 individual or group 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 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 report spending approximately 20 hours completing the six assessments.

**Component 4:**..... CWICs completed the first set of assessments receive provisional certification, which enables them to begin to provide services to beneficiaries. During the first year of provisional certification, CWICs are required to submit three case files for review and evaluation. CWICs who successfully complete this process receive full certification.

**Component 5:**..... 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	
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

(continued)

4. Providing Healthcare Planning and Counseling
5. Conducting Quality Assurance/Continuous Quality Improvement Activities
6. Providing Effective Work Incentives Planning and Assistance Services

## Major CWIC Competency Areas

### **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 addresses eligibility criteria, referral procedures, and services available from various entities such as state Vocational Rehabilitation Agencies, One-Stop Centers administered by state Workforce Development agencies, 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**

The focus of this module is on providing effective outreach to SSA beneficiaries in the WIPA project's catchment area, 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 work incentives, including 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; and the effect of Net Earnings from Self-Employment (NESE) on SSI and DI cash payments. Part B focuses on the impact of employment on other federal benefit programs and associated work incentives.

### **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, and the 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 participant 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 Project Director. Training and technical assistance activities are provided through our national network of technical assistance liaisons. These liaisons are identified below.

<b>NATIONAL TRAINING CENTER TECHNICAL ASSISTANCE LIAISONS</b>	
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Finally, to implement this large-scale program, VCU has partnered with a group of nationally recognized organizations to assist in the performance of project activities.

**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)** provides national and international leadership on disability benefits and work, disability statistics, the ADA and workplace accommodations 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).





# Acknowledgements

The WIPA National Training Curriculum represents the collective effort of a dedicated group of contributors who worked tirelessly to develop a resource for CWICs that will form the basis of training and technical assistance activities for the coming year.

Lucy Miller of the VCU NTC coordinates the overall development of the manual the overall structure and organization of content. She has also much of the content throughout the six modules. Many NTC staff, subcontractors and consultants have contributed new or revised content in the past year, including Laura Coffey Richardson, Dalia El-Khoury, Gail Falk, Connie Ferrell, Julie Koehler, Mason O'Neal, Mary Ridgely, and Molly Sullivan. Without the combined efforts and talents of these individuals, the manual would not be the valuable resource it is today.

The material included in the NTC manual has been reviewed by the Social Security Administration and collaborating entities for accuracy. We are extremely grateful to Carol Cohen and her colleagues in the Office of Employment Support Programs, other units of SSA, and other federal agencies who thoroughly reviewed the document and provided outstanding guidance and technical support.

The production of a curriculum this size is a challenging task that required a large number of people with a variety of skills. Julie Schall coordinates our production process and Jeanne Roberts formats and produces the final set of manual documents. As the manual has grown over the years, so has their patience with our many authors and their dedication to accuracy and ease of use.

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.

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