

**Work Incentives Planning and Assistance Services Defined
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The primary purpose of the WIPA program is to provide beneficiaries with accurate information about work incentives programs and assist beneficiaries to succeed in their efforts to obtain, retain, or enhance employment. The services which WIPA projects have committed to provide were clearly described in the solicitation for Cooperative Agreements for Work Incentives Planning and Assistance Projects; Program Announcement No. SSA-OESP-06-1 which was published in the Federal Register Vol. 71, No. 94, Tuesday, May 16, 2006:

1. Work Incentives Planning Services

Work incentives planning services requires an in-depth understanding of the beneficiary's current situation and how available work incentives can impact on a beneficiary's employment efforts. CWICs will establish written benefits analysis plans for beneficiaries with disabilities outlining their employment options and develop long-term supports that may be needed to ensure a beneficiary's success in regards to employment. CWICs will also, based upon a beneficiary's needs, make referrals to Employment Networks (ENs) or Vocational Rehabilitation (VR) when appropriate. CWICs will also provide periodic, follow-up planning services to ensure that the information, analysis, and guidance is updated as new conditions (with regard to the applicable programs or to the beneficiary's situation) arise. To provide work incentives planning services, CWICs will:

- Obtain and evaluate comprehensive information about a beneficiary with a disability on the following:
 - a. Beneficiary's background information
 - b. Disabling impairments/conditions
 - c. Educational and vocational background
 - d. Employment and earnings
 - e. Resources
 - f. Federal, State and local benefits
 - g. Health insurance
 - h. Work expenses
 - i. Work incentives
 - j. Service(s) and supports

- Assess the potential impacts of employment and other changes on a beneficiary's federal, State and local benefits eligibility and overall financial well-being;
- Provide detailed information and assist the beneficiary in understanding and assessing the potential impacts of employment and/or other actions or changes on his/her life situation, and provide specific guidance regarding the effects of various work incentives;
- Develop a comprehensive framework of possible options available to a beneficiary and projected results for each as part of the career development and employment process; and
- Ensure confidentiality of all information provided.

2. Work Incentives Assistance Services

Work incentives assistance involves the delivery of accurate information and direct supports for the purpose of assisting a beneficiary in determining the most advantageous work incentives to use in going or returning to work. Work incentives assistance also involves providing information and referral (specifically in terms of Ticket assignment to Employment Networks and Vocational Rehabilitation), as well as problem-solving services as needed.

Work incentives assistance will generally build on previous planning services and include periodic updates of a beneficiary's specific information, reassessment of benefit(s) and overall impact, education and advisement, and additional services for monitoring and managing work incentives to ensure a beneficiary's success in their employment efforts. To provide work incentives assistance services, CWICs will:

- Emphasize employment through the use of work incentives planning, leading to greater self-sufficiency and employment for beneficiaries with disabilities;
- Refer beneficiaries to Vocational Rehabilitation (VR), Employment Networks (ENs), DOL One-Stop Career Centers, as well as other organizations that emphasize/provide seamless employment-related supports and ticket assignments;
- Assist beneficiaries with disabilities to resolve problems related to work efforts, higher education and work attainment or continuation of work;
- Provide ongoing, comprehensive work incentives monitoring and management assistance to beneficiaries who are employed or seeking employment;
- Provide long-term work incentives management on a scheduled, continuous basis, allowing for the planning and provision of supports at regular checkpoints, as well as critical transition points in a beneficiary's receipt of benefits, improvement of medical condition, work attempts, training and employment;

- Provide ongoing direct assistance to a beneficiary in the development of a comprehensive, long-term work plan to guide the effective use of Federal, State and local work incentives. Specific components of the plan must address:
 - a. Desired return to work and self-sufficiency outcomes,
 - b. Related steps or activities necessary to achieve outcomes,
 - c. Associated dates or timeframes,
 - d. Building on initial work incentives planning efforts including information gathering, analysis and advisement, and
 - e. Benefits/financial analysis (pre and post-employment);

- Provide intensive assistance to beneficiaries, their key stakeholders, and their support teams in making informed choices and establishing employment-related goals. Needed assistance may include, but is not limited to, the following:
 - a. Explanations, descriptions, and written plans on how SSDI and SSI work incentives programs may lead to self-supporting employment by developing a Plan for Achieving Self-Support (PASS); the use of Impairment Related Work Expenses (IRWEs); the use of a Subsidy; Ability to claim Unincurred Business Expenses; Continued Payments Under a Vocational Rehabilitation Program (also known as Section 301); as well as the possibility of reinstatement of benefits when necessary without filing a new application;
 - b. Explanations, descriptions, and written plans on how the SSI 1619(a) and 1619(b) provisions and requirements may lead to self-supporting employment by allowing for continued medical assistance coverage; Earned Income Exclusion (EIE); Student Earned Income Exclusion (SEIE); Property Essential to Self-Support (PESS); as well as the possibility of reinstatement of benefits when necessary without filing a new application;
 - c. Explanations, descriptions, and written plans on how the Trial Work Period (TWP) and Extended Period of Eligibility (EPE) provisions may lead to self-supporting employment by allowing payment of benefits for a specified period of time dependent upon the amount of earnings; and
 - d. Advocating for work supports on behalf of a beneficiary with other agencies and programs, which requires in-person, telephone and/or written communication with the beneficiaries, other individuals and other involved parties, generally, over a period of several weeks to several months.

- Provide ongoing follow-up assistance to beneficiaries who have previously received work incentives planning and/or other types of work incentives assistance services, and assist them and other involved parties to:
 - a. Update information,
 - b. Refer to Employment Networks (ENs) or Vocational Rehabilitation (VR), when necessary,

- c. Reassess impact of employment and other changes on benefits and work incentives, and
 - d. Provide additional guidance on work incentives options, issues and management strategies.
- Assist beneficiaries to update work incentives management plans throughout their employment efforts;
 - Collaborate with SSA's Program Manager for Recruitment and Outreach (PMRO) to conduct outreach to beneficiaries with disabilities about the use of work incentives to work.

3. Support to PMRO Work Incentives Education/Ticket Marketing/Recruitment

The WIPA awardees will be required to provide local CWIC support to the PMRO in order to provide community-based Work Incentives Educational Seminars (WISE) for beneficiaries with disabilities to learn about available work incentives. These local Work Incentives Education/Ticket Marketing/Recruitment meetings are intended to provide accessible, scenario based learning opportunities for beneficiaries with disabilities to understand the availability and use of work incentives to assist them in their return to work efforts. In addition, Vocational Rehabilitation (VR), Employment Networks (ENs) and other employers will also be invited to participate to introduce their services at the end of these meetings so that beneficiaries who want to work will be informed about available employment support services and opportunities in the community. The PMRO has primary responsibility for outreach. In support of PMRO activities, WIPAs should designate a maximum of 10% of their staff time to ticket marketing/recruiting efforts under the direction of the PMRO. The WIPA should make staff resources available at least one day per week to assist the PMRO to:

- Identify accessible local venues for holding meetings (preference should be given to DOL One-Stop Career Centers);
- Conduct regular (at least weekly) work incentives education and Ticket to Work recruitment sessions in collaboration with the PMRO, SSA staff, the local Workforce Investment Boards Disability Program Navigators, local Employment Networks (ENs), Vocational Rehabilitation (VR), employers and other potential partners; and
- At the weekly sessions present with the assistance of local SSA staff (if available) a 60–90 minute scenario-based work incentives overview to be provided (in accessible formats) by the PMRO.

4. Additional Work Incentives Outreach Services

Work incentives outreach activities are educational efforts to inform beneficiaries of available work incentives, as well as the services and supports available to enable them to access and benefit from those work incentives in terms of working. In view of the fact that the PMRO has primary responsibility for outreach, WIPA's should designate no more than 10% of their project resources for other local outreach efforts; excluding those resources allocated to the PMRO Work Incentives Educational Seminars. WIPA's will be provided such things as marketing materials, developed by the PMRO. Each project will support the PMRO in doing outreach, participate with them, and coordinate any outreach activities through them.

Outreach activities should be targeted directly to SSDI and SSI beneficiaries with disabilities, their families, to advocacy groups, service provider agencies, and employers that have regular contact with them. Outreach activities should be directed toward and sensitive to the needs of individuals from diverse ethnic backgrounds, persons with English as their second language, as well as non-English speaking persons, individuals residing in highly urban or rural areas, and other traditionally underserved groups. To conduct ongoing local outreach, CWICs will:

- Prepare and disseminate information explaining the Ticket to Work Program and other Federal, State or local work incentives programs and their interrelationships; and
- Work in cooperation with the Program Manager Recruiting and Outreach (PMRO) contractor to market the Ticket to Work Program, as well as other Federal, State, and private agencies and nonprofit organizations that serve beneficiaries with disabilities, such as DOL One-Stop Career Centers and with other agencies and organizations that focus on vocational rehabilitation and work-related training and counseling.

To assist SSA in assessing the scope and usefulness of outreach and information provided under this program, each project is required to demonstrate a collaborative effort among other community-based organizations experienced in providing services to people with disabilities, particularly DOL One-Stop Career Centers

In addition, projects will conduct regular work incentives education and Ticket to Work outreach sessions in collaboration with the PMRO, SSA staff, the local Workforce Investment Board's Disability Program Navigators, Vocational Rehabilitation (VR), local Employment Networks (ENs) and other potential partners. Projects will also need to coordinate joint outreach services with the SSA Area Work Incentives Coordinator (AWIC) to include attendance at quarterly Training and Technical Assistance meetings with the AWIC.