




VIRGINIA COMMONWEALTH UNIVERSITY
Work Incentives Planning and Assistance
National Training and Data Center

**CABHI: Soar & IPS Pilot
Teleconference - January 2017**

Work Incentives Planning & Assistance (WIPA)

- Created as part of the Ticket to Work and Work Incentives Improvement Act of 1999.
- Social Security has cooperative agreements with 83 community agencies across the nation and the U.S. territories to provide WIPA services.
- WIPA projects are staffed by Community Work Incentives Coordinators (CWICs) who are trained to provide individualized, in-depth employment focused benefits analysis and work incentives planning.
- To date, WIPA projects have served more than 750,000 individuals.

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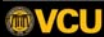


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WIPA is all about WORK

The mission of the WIPA program is to **promote employment** and **financial independence** for beneficiaries of the Social Security disability benefit programs.

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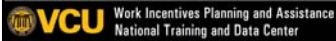
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Individualized Work Incentives Planning & Assistance

This is the cornerstone of WIPA services and may include:

- In-depth personalized benefits analysis covering all Federal, state, and local benefits.
- Customized counseling about the impact of work on all Federal, state, and local benefits and development of a comprehensive Benefits Summary and Analysis (BS&A) report.
- Assistance with identifying, developing, utilizing, and managing Social Security work incentives.

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Individualized Work Incentives Planning & Assistance Continued:

- Assistance with resolving problems related to benefits.
- Assistance with identifying and resolving barriers to obtaining or maintaining employment.
- Making referrals for needed services or supports with particular emphasis on meeting employment needs.
- Training and support on effective reporting procedures and benefits management techniques.

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WIPA Services Delivered by Trained CWICs

To provide WIPA services, CWICs must:

- Receive a level 5 suitability determination from Social Security;
- Complete a rigorous initial training and two-part assessment process to achieve certification; and
- Complete ongoing training to maintain certification.


CWICs have access to technical support provided by VCU's National Training & Data Center (NTDC).

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**Strategies for Working Effectively
with WIPA Projects**

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Tip #1
Refer Eligible High Priority Beneficiaries

- Check to make sure beneficiaries are eligible for WIPA services.
- Social Security has established clear priorities that CWICs are expected to follow.
- While all eligible beneficiaries will receive information and referral (I&R) services, individualized services are typically reserved for beneficiaries who are closest to employment.

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Beneficiary Prioritization in the WIPA Program

Priority Group 1: Individuals who are currently working or engaging in self-employment and have both a need for and interest in receiving individualized work incentives planning and assistance services.

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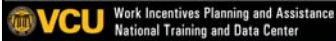
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Beneficiary Prioritization in the WIPA Program

Priority Group 2: Beneficiaries who are actively pursuing employment or self-employment and who are interested in receiving work-related benefits counseling. This includes:

- beneficiaries with a clear employment goal who are conducting an active and regular job search; and
- beneficiaries with a clear employment goal who have taken active steps to prepare for achieving that goal.

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Tip #2 Follow the Referral Process

- Each WIPA project is responsible for a specific coverage area. Make sure you refer beneficiaries to the correct agency:

WIPA Project locator found at: <https://choosework.net/findhelp/>

- WIPA projects have different referral procedures. Contact the local WIPA project to find out how to make a referral.
- Refer beneficiaries BEFORE employment begins whenever possible.
- Help educate on WIPA services and what to expect.

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Tip #3 Keep Lines of Communication Open


- Maintain open lines of communication and contact the CWICs serving your area frequently.
- Make certain releases are current so you have permission to communicate with the CWIC.
- Be sure to read the benefits analysis reports developed for the beneficiaries you serve and contact the CWIC with questions.
- When benefit problems or concerns arise, help beneficiaries contact the CWIC for assistance.

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VCU National Training and Data Center Provides:

- Social Security Approved National Training Curriculum
- CWIC Training and Certification
- Individual and Organization Level Technical Assistance
- Ongoing Professional Development Training for Continuing Certification
- Archived Training and Resource Materials
- WIPA National Data System and Reporting

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VCU NTDC Resources

- Social Security Disability Programs and Work Incentives Introductory web course – coming soon!
- Initial Training and Certification for Community Partner Work Incentives Counselors – EN staff provided highest priority after WIPAs
- Training Calendar:
<https://vcu-ntdc.org/training/initial/calendar.cfm>

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VCU NTDC Resources for ENs

- Access to ongoing work incentives training and technical assistance for certified community partners
- Access to the CWIC training manual and extensive resource materials on the NTDC website: <http://vcu-ntdc.org/>

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