



Project E3: Educate, Empower, and Employ

Work Incentive Planning Services

projecte3.com





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Webcast Goal & Objectives

- **Goal: Know why and how to refer someone for work incentive planning services**
 - Objective 1: Explain work incentive planning services
 - Objective 2: List the eligibility criteria for Work Incentive Planning and Assistance (WIPA) projects
 - Objective 3: Locate a WIPA project based on a person's zip code.
 - Objective 4: List strategies to find out if others provide work incentives planning in your state
 - Objective 5: List ways you can build your knowledge about work incentives



Purpose of Work incentive planning services

⇒ **Purpose - Work incentive planning services help beneficiaries who are working or who are interested in work:**

1. Make an informed financial decision about work
2. Use work incentives
3. Develop strategies to manage public benefits
4. Problem-solve some benefit issues



Service Delivery Process

1. Determine eligibility for services (based on funder) and triage
2. Conduct comprehensive intake
3. Verify benefits
4. Research and analyze the effect of work goal on benefits, then write up the analysis (called a Benefits Summary & Analysis, BS&A)

5. Provide and explain analysis (Benefits Summary & Analysis)

- Purpose: Help person make an informed financial decision about work

6. Provide ongoing support

- Purpose: Use work incentives
- Purpose: Develop strategies to manage public benefits
- Purpose: Problem-solve some benefit issues



Professionals Who Deliver Work Incentive Planning

⇒ Specialized knowledge and skills required to provide advisement about effect of work on benefits

⇒ Various job titles:

1. Community Work Incentive Coordinator (CWIC) – funded by Social Security WIPA project to provide services and has certification through Virginia Commonwealth University
2. Community Partner Work Incentive Counselor (CPWIC) – NOT funded by WIPA but has certification through Virginia Commonwealth University
3. Benefits and Work Incentives Practitioner – certification through Cornell
4. Work Incentive Counselor, Benefit Planner, Benefits Specialist, etc. – generic terms



Objective 1:

How do you explain work incentive planning services?

⇒ Work incentive planning services are services that:

- What: Help you: (1) make an informed decision about work, (2) use work incentives, (3) develop strategies to manage benefits, and (4) problem-solve some benefit issues
- Who: Provided by a trained and certified professional
- How: Include a thorough intake, verification of your benefits, estimation of the effect an earning goal will have on your benefits, and ongoing support about benefits and work.



Availability Of Work Incentive Planning Services

⇒ Availability of services differ from one state to another, but there is a Social Security funded Work Incentive Planning and Assistance (WIPA) project in every state

⇒ WIPA Basics:

- Nonprofit or state agencies awarded funding from Social Security to provide work incentive planning services
- Some states have more than one WIPA project, depending on population (e.g. WY has one, Texas has five), each serving a designated area
- WIPA project(s) will collectively provide services to the entire state
- No cost for WIPA-funded services



Objective 2: List The Eligibility Criteria For WIPA

⇒ WIPA eligibility criteria:

- Age 14 to full retirement age (older with some exceptions)
- Disabled based on Social Security's definition
- Receiving Supplemental Security Income (SSI) or a Title II Social Security disability benefit (such as Social Security Disability Insurance) (with some exceptions)

⇒ Focus is to serve those who are working, actively seeking work (applying for jobs or taking steps to prepare for work specific goal), or age 14 to 25



Objective 3:

Locate A WIPA Project Based On A Person's Zip Code

⇒ Use the online directory to help a person you support find the WIPA project that serves their geographic area

⇒ Go to: www.choosework.ssa.gov

- Click “Find Help”
- Click “Start Your Direct Search” under “Option 2: Direct Search”
- Check the box next to “Benefits Counseling (WIPA)” and uncheck other types of services providers if only searching for WIPA provider
- Enter person’s zip code
- Keep the default, “Both virtually and in-person”
- Click “Start New Search”
- Results will show on the bottom of the page



Other Work Incentive Planning Services

⇒ WIPA funding is limited

⇒ Efforts in some states to build capacity of work incentive planning services

- Some state Vocational Rehabilitation agencies have staff or contract with vendors to provide services
- Some state Medicaid agencies are including benefits advisement as a service or part of service
- Some organizations are, such as Employment Networks, are building internal capacity to serve those in their organization



Objective 4: List Strategies To Find Out If Others Provide Work Incentives Planning In Your State

- ⇒ Ask the person's Vocational Rehabilitation counselor if the agency has staff or contracts with vendors to provide services
- ⇒ Ask the person's Medicaid case manager if work incentive planning services are provided through a Medicaid provider
- ⇒ Ask the person's employment service provider (or other organizations) the person is involved with if they have the ability to provide work incentive services



Objective 5: List Ways You Can Build Your Knowledge About Work Incentives

⇒ You can build a basic understanding of work incentives:

- Virginia Commonwealth University's National Training and Data Center (VCU-NTDC) Introductory Web Course
- Introduction to Social Security Disability Benefits, Work Incentives, and Employment Support Programs
- <https://vcu-ntdc.org/training/initial/introIndex.cfm>

⇒ Social Security's Red Book

- <https://www.ssa.gov/redbook/>



Closing

⇒ You know why and how to refer someone for work incentive planning services

- Explain work incentive planning services
- List the eligibility criteria for Work Incentive Planning and Assistance (WIPA) projects
- Locate a WIPA project based on a person's zip code.
- List strategies to find out if others provide work incentives planning in your state
- List ways you can build your knowledge about work incentives

⇒ Final Questions?



Recordings and Community of Practice

- ⇒ Copies of the recorded webinar and the PowerPoint slides will be available to our Project E3 Community of Practice (CoP) members.
- ⇒ You need to register to be a member of the CoP. To register for the CoP, go to <https://projecte3.com/>
- ⇒ Answers to all the questions written in the Q & A box will be answered and posted on the E3 CoP site.
- ⇒ If you would like CRC credit for this webinar, look for the email after this webinar, complete the evaluation, fill in your First Name, Last Name and email address and you will receive your credit.