

Welcome and SSA Updates

Adelle Barr reviewed the new ReadyTalk protocols for using the platform features.

Rob Pfaff (SSA)

Robert Pfaff welcomed everyone and shared updates regarding the agency-wide reorganization of the Office of Research Demonstration and Employment Support (ORDES) at SSA, which is part of an agency wide streamlining effort:

- The Office of Beneficiary Outreach and Employment Support (OBOES) and the Office of Ticket Operations and Provider Support (OTOPS) merged into a new component called the Office of Employment Support (OES). Rob serves as the Division Director for this new office. Patrice McLean serves as the OES Deputy Director and leads the Policy and Innovation Team.
- Jennelle Bratcher serves as the Branch Chief for the Vocational Rehabilitation (VR) Payments Team.
- Cara Caplan leads the Contracts and Grants team, which encompasses the Work Incentive Planning and Assistance (WIPA) program, Protection and Advocacy Program for Beneficiaries of Social Security (PABSS), and the Ticket Program Manager.
- Susan Wilschke assumes the responsibilities of Deputy Associate Commissioner of ORDES.
- Kate Bent continues as the ORDES Associate Commissioner.
- Regina Bowden has transitioned to a Senior Advisor supporting all areas.

Rob welcomed 3 new ENs that joined the program since the last call: Career Source Suncoast of Florida, COR Enterprises of Montana, and Arc of Greater Boone County in Indiana.

The training schedule for EN training modules is now available online. ENs can identify and sign up for available training classes. ENs are encouraged to take advantage of this training functionality for both new staff or for staff updates.

<https://yourtickettowork.ssa.gov/traububg-and-events/index.html>

Rob issued a suitability guidance reminder. SSA continuously conducts site visits where they identify EN staff who do not have suitability. Staff may be serving an individual before they are aware of beneficiary status. This is fine, but once the EN identifies them as an SSA beneficiary AND assign their Ticket, that person needs to work with someone in the

organization who has suitability. This is a government-wide requirement, not just a Ticket program requirement. Staff with suitability can provide the service by phone.

WIPA Research and Outcomes

Emily Roessel (SSA)

Rob introduced Emily Roessel, a research analyst in ORDES to present employment outcomes information for beneficiaries receiving WIPA services.

SSA analyzed employment and earnings outcomes for 2 groups of SSI and SSDI beneficiaries who enrolled in WIPA services in 2009 and compared their outcomes with those beneficiaries who did not receive WIPA services. The 2 groups were followed for 6 years through 2015. Overall, beneficiaries seeking employment when they received WIPA services had better outcomes than those seeking employment who had not received WIPA services.

Beneficiaries who were already employed when they started receiving WIPA services also showed better outcomes than those who were employed and had not received WIPA services.

SSA also compared averages for the 2 groups across several employment parameters, including long-term employment and earnings, benefit exit, and benefit program savings. Overall, WIPA beneficiaries did better than non-WIPA beneficiaries on all parameters.

Emily cautioned that these findings do not imply causal impacts but noted clear relationships between WIPA services and better employment outcomes.

Audience questions:

Q: Do staff who provide the WIPA service need suitability?

A: Yes. CWICs and anyone trained to provide benefits advice should have suitability.

Q: Will there be funding for additional WIPA CWIC training?

A: No additional WIPA CWIC funding will be available, but SSA is expanding similar training for EN staff. That presentation is next.



Work Incentives and Benefits Counseling Training

Susan O'Mara (VCU)

Adelle Barr introduced Susan O'Mara, Director of the Virginia Commonwealth University (VCU) National Training and Data Center (NTDC).

Susan presented a PowerPoint providing information on the Social Security Work Incentives Planning and Assistance (WIPA) program, and the VCU NTDC's role in providing training and technical assistance. There are currently 82 local WIPA projects staffed by over 300 Community Work Incentive Coordinators (CWICs) who provide individualized work incentives and benefits counseling services to about 35,000 beneficiaries per year.

Susan then provided an overview of two training opportunities for both WIPA projects and community partner organizations offered by NTDC:

1. **WIPA and Community Partner Work Incentives Counseling (CPWIC) Initial Training and Certification:** The NTDC provides a rigorous initial training and certification process for WIPA staff and Community Partner staff who will be providing work incentives and benefits counseling services to beneficiaries. The 1-year training and certification process begins with a 5-day face-to-face training, followed by a two-part certification process. Part I of the certification process consists of a series of on-line competency-based assessments over a 6-week period. Part II of the process requires the submission of three satisfactory Benefits Summary and Analysis reports for Social Security Disability beneficiaries the provider is counseling. Participants must successfully complete both parts of the certification process to be fully certified. Following full certification, WIPA Community Work Incentives Coordinators (CWICs) and CPWICs also engage in annual continuing education to maintain certification.

The NTDC is offering 12 Initial Training and Certification classes this year with up to 30 participants in each. WIPA staff receive first priority, followed by Community Partners, which include staff employed by state VR agencies, ENs, Workforce agencies and various disability organizations.

Information on the Initial training and certification is available at <https://vcu-ntdc.org/training/initial.cfm>. There is no fee but participants must provide their own travel, lodging and meals.

2. **Social Security Disability Benefits, Work Incentives, and Employment Support Programs Web Course:** The NTDC also provides an introductory online course for individuals who do not provide Work Incentives and benefits counseling services but would like a basic understanding of the Social Security disability programs (SSI and SSDI) and associated work incentives. The course consists of 6 self-directed modules



that require about 8 hours to complete, and offers Certified Rehabilitation Counselor (CRC) credit, and a certificate of completion. There is no fee and currently no class limit for the course. VCU offers the course 8 times each year and the calendar is available at <https://vcu-ntdc.org/training/initial/introcal.cfm>.

Rob Pfaff noted 2 important points related to the training, including the benefits and outcomes associated with the provision of benefits counseling, and the opportunity for VCU to expand the training and certify community partners. ENs may want one person on their staff to be certified and other staff to take the online training.

SSA's goal is for ENs to maximize this opportunity. The importance is fundamental since the Ticket program is based on Work Incentives. The impact of earnings on benefits will be a question every beneficiary will ask. ENs need to know and help their beneficiaries navigate these issues. It is an important and valuable service for clients. If ENs take a training from a different entity, that is fine. SSA does not advocate one training over another but aims to expand training opportunities.

Audience Q & A:

Q: Among WIPA contract holders, is there a particular method for a WIPA staff to make referrals to an EN, VR or other employment providers? Are there controls in place to assure an equitable referral process to community providers?

A: WIPA training includes the CWIC role in making referrals to community resources and organizations and linking beneficiaries with those community supports. CWICs should help the beneficiary make a choice of community supports.

A: ENs are encouraged to reach out to WIPA staff in their area and find out how to best work together for referrals both ways.

Q: Must all CWICs pass suitability?

A: Yes. To provide services to beneficiaries, they must have suitability.

Q: What is the difference between a CWIC and a CPWIC?

A: It is the same training and certification process but the certifications differ in continuing education requirements.

Q: Is there a cost for the online course?

A: There is no cost. As of now, everyone has been approved for attendance without cost.

Q: Is the Charlotte training a CPWIC training?

A: The CWIC and CPWIC trainees go to the same class. It is both.



Q: Can training modules be added for federal, state or other benefits?

A: This is a program to address the Social Security program benefits and incentives. But send (Susan O'Mara) a more detailed question related to state benefits so we can consider this.

Q: When attending an online class, is there a certain time that you must attend?

A: The class is offered for a 2-week period, but is self-paced and can be accessed at any time.

Q: Where do you go to find the online web training?

A: www.VCU.ntdc.org

EN Updates

Cara Caplan (SSA)

SSA will host a national call with ENs on Tuesday, November 20, about Certification of Services related to Phase 1 milestones and requirements. The format will be a 1-hour question and answer session. Please attend with prepared questions.

Regarding EN overpayment recovery, as of November 1, SSA is no longer accepting overpayment checks from ENs. SSA will recover overpayments from any payments due to the EN, not just payments related to the overpaid SSN.

There are changes in state assignments for SSA EN Service staff. State assignments are posted on the website at <https://yourtickettowork.ssa.gov/Assets/yttw/docs/about-ticket-to-work/TTW-Contact-Email-List-20181018.pdf>

ENs have specific performance expectations under the Ticket Program Agreement (TPA). Specifically, according to part 3 section 9a, at a minimum, all ENs must take at least 1 Ticket assignment and receive at least 1 Ticket payment within the first year following TPA award. ENs must also maintain a minimum of 3 Tickets and 3 payments in each subsequent year. SSA has reached out to ENs with no Tickets assigned. Some ENs were terminated and others received cure notices. ENs with a cure notice will need to go through mandatory training and comply, or terminate with the program. If you have any questions, contact ENservice@SSA.gov.

EN Foundations Training

Ana Morales (TPM)

Ana shared information on the 16 EN Foundations training modules referenced by Rob



Pfaff earlier on the call. Topics range from EN Orientation, Suitability, Timely Progress Review, Preparing an Individual Work Plan, etc. The modules are mandatory for new ENs and new EN points of contact. The first phase of training is individualized and phases 2, 3 and 4 are offered in group format. The training schedule is at <https://yourtickettowork.ssa.gov/traububg-and-events/index.html>. Register for training or submit questions to ENoperations@yourtickettowork@SSA.gov.

Concluding Remarks and Question and Answer Period

Rob Pfaff shared that 2019 COLA notices will be mailed to every Ticketholder and the notice will include Ticket program information. SSA will send several million letters from November through January. ENs should expect an increased call volume.

Additional Details

Final Q & A will be available at <https://yourtickettowork.ssa.gov/web/ttw/events-archive>. The full transcript and audio from the Quarterly All-EN Call will be available at <https://yourtickettowork.ssa.gov/web/ttw/events-archive>.

The next All EN call is scheduled for February 21, 2019.

