

Work Incentives Training Funds Provided by DHCS

What is work incentives planning?

Individuals who are considering a return to work need accurate information about how their entitlements will be affected by earned income. Providing this information should only be done by a person who is credentialed in benefits planning and completes ongoing training to retain their certification. Note: “Work Incentives Counseling/Planning” is also referred to as “Benefits Planning.”

The IPS Supported Employment Fidelity Scale includes an item about work incentives planning (see page 8 of the Fidelity Scale). The item reads, “All clients are offered assistance in obtaining comprehensive, individualized work incentives planning before starting a new job and assistance accessing work incentives planning thereafter when making decisions about changes in work hours and pay. Work incentives planning includes SSA benefits, medical benefits, medication subsidies, housing subsidies, food stamps, spouse and dependent children’s benefits, past job retirement benefits and any other source of income. Clients are provided information and assistance about reporting earnings to SSA, housing programs, VA programs, etc., depending on the person’s benefits.” IPS specialists are discouraged from providing benefits planning unless they have completed credentialed training.

Generally, people who are considering work need to access benefits planning within a couple of weeks so that they do not lose interest in employment. And those who are working, may need to make quick decisions about their income.

Where does benefits planning occur?

Benefits planning may be offered virtually, in an office, or in the community. Benefits planning in the community should be done in private spaces so that confidentiality can be assured, for example, a benefits planner could reserve a room at the local library to meet with a person who is deciding whether to work. Or a benefits planner could meet with a job seeker and a family member at the family home. This is consistent with the IPS approach to making services as accessible as possible.

What work incentives planning is available in California?

Trained benefits planners in California are virtually nonexistent for individuals who do not have open cases with the Department of Rehabilitation (DOR). However, DHCS has made funding

available to pay for staff from counties or county-contracted agencies to complete the Work Incentive Practitioner-Credentialed (WIP-C) training at Cornell's Yang-Tan Institute (YTI Online). The cost of this training is normally \$1,575 per person. The credential is good for three years and can be renewed if requirements for CEUs are met.

The YTIOnline virtual benefits planning training program was recognized by the Social Security Administration for years and is now the only credentialed training available for practitioners. IPS fidelity reviewers agree that the certification is sufficient for a practitioner to be considered a trained work incentives planner.

Who can be a benefits planner?

The type of person who would enjoy and excel at this work is someone who loves solving detailed problems and is quality conscious. They should also enjoy teaching other people, which is really what benefits planning is about. It is helpful if they are not intimidated by math and it is important to select people in positions with lower rates of turnover. In one agency an intake worker became a benefits planner because she liked meeting clients and sometimes did work for the billing department, which she also enjoyed. Some IPS supervisors become certified for benefits planning because it helps them meet more people served by the team and that improves the quality of the supervision they provide.

Agency or county staff who wish to be considered for training must submit an application. Counties with large populations may propose more than one person to be trained. The COE may approve multiple benefits planners for one county based upon the size of the county and the total number of applications submitted. An application is on the final page of this document. Applications that will be prioritized are those that indicate the following:

1. The person(s) and position(s) at the program/county who would be trained.
2. The trainee's commitment to attend all 17 webinars, take the test, and complete the assignment required to become certified.
3. The percent of FTE that would be allocated for benefits planning. Priority will be given to programs that are willing to increase the capacity of the benefits planner to match demand. For example, an agency could indicate that they would start with a 0.25 FTE benefits planner and increase to 1.00 FTE, if needed.
4. The county/agency's commitment to increase the FTE as demand for work incentives planning grows.
5. The county/agency's agreement to prioritize benefits planning for the following groups:
 - IPS participants receiving services from the county or a county-contracted agency.
 - Individuals with serious mental illnesses and/or substance use disorders.
6. Keeping in mind the guidelines in #5, the county/agency will serve individuals on a first-come, first-served basis with the exception of workers who may quit a job after receiving a re-determination letter from Social Security Administration, workers who

are deeply concerned about a decrease in benefits while employed, people who are worried about a notice from SSA about overpayments, and those who must make a quick decision about accepting a job, a promotion, or an increase in their work schedule.

7. The county/agency's agreement to accept referrals from mental health practitioners and IPS specialists. Further the service provider should post information about benefits in public areas of the building so that individuals can self-refer (or at least call to learn if they are eligible to receive the service).
8. The county/agency's agreement to call people a day in advance to remind them of their appointments.
9. The county/agency's agreement to reschedule missed appointments (although they may request that the person's IPS specialist, family member, or mental health practitioner attend the next appointment with the individual).
10. The county's/agency's agreement to meet with some people multiple times if they have difficulty comprehending the information or forget how to report earnings to entitlement systems.
11. The county/agency's agreement that the WIP-C will develop individualized information in a written report for both the individual and the referral source.
 - The report must include at least two scenarios that show how the person's entitlements would be affected by different levels of earning, as well as the person's total monthly income in each situation.
 - A copy of the report should be shared with any family members or other support people who attend the appointment with the individual, as well as the referrer (releases of information may be required).
 - And the report should include information about how to report earnings to each entitlement source.

Application

[Click here](#) to download and complete your application. *(Please check your downloads folder for the file)*

Please direct **questions** to Sarah.Swanson@NYSPI.Columbia.Edu

Please submit **applications** to ips.bhcoe@nyspi.columbia.edu

Please use the subject line, **"WIP-C Training."**