

NH GSEP Project

Work Incentives Specialist (Tier 2) Competency Checklist

Revised October 12, 2010

<b>Competency Area: Pre-requisite Training and Experience</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low
1. Has successfully completed the requirements for Tier 1b training within the past 12 months.	2 1 0	H M L
2. Has successfully completed the requirements for Tier 2 training within the past 12 months.	2 1 0	H M L
3. Has at least 1 year of experience working with individuals with disabilities in employment, supported employment, vocational or related field.	2 1 0	H M L
4. Has demonstrated the ability to calculate a change in benefit amounts, can identify dates of critical benefits changes, and other planning activities and calculations critical to accurate advisement of work incentives.	2 1 0	H M L
<b>Competency Area: Outreach</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low
1. Is able to identify departments, programs, agencies, and individuals in order to outreach to people with disabilities.	2 1 0	H M L
2. The agency has established a positive ongoing working relationship with the regional vocational rehabilitation office.	2 1 0	H M L
3. Staff in the agency can accurately describe the work incentive specialists' roles and responsibilities.	2 1 0	H M L
4. There exists a clear, written and accessible process and format for referrals to the work incentives specialist, including a process that family members and consumers can access.	2 1 0	H M L

5. Referrals for work incentives counseling are appropriate (individual is exploring employment, is employed, or needs information to explore employment).	2 1 0	H M L
6. The Work Incentives (WI) Specialist spends a reasonable amount of time each week to generate a consistent and adequate number of referrals monthly for work incentives counseling (at least 3-5 referrals per month).	2 1 0	H M L
7. The WI Specialist uses accessible materials including PowerPoint presentations, handouts, and other materials for outreach to a variety of audiences and to generate referrals for work incentives counseling.	2 1 0	H M L
<b>Competency Area: Content Knowledge and Skills</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low
1. The WI Specialist demonstrates and can articulate accurate knowledge of SSDI/SSA benefit eligibility criteria, and rules for Trial Work Period, SGA, EPE, UWA, subsidies, IRWE's, post-EPE rules, Expedited Reinstatement, and other rules pertaining to employment for SSA beneficiaries. (Evidence: Work Incentives Plan and BWISS analysis).	2 1 0	H M L
2. The WI Specialist demonstrates and can articulate accurate knowledge of SSI eligibility criteria, and the rules for calculating benefits with wages, knows assets limits and rules, IRWEs, BWEs, 1619(a) and 1619(b), Expedited Reinstatement, and other rules pertaining to employment for SSI beneficiaries.	2 1 0	H M L
3. The WI Specialist demonstrates and can articulate accurate knowledge of eligibility criteria for concurrent beneficiaries, including the rules for calculating benefit amounts, IRWEs, breakeven points, and other rules pertaining to employment for beneficiaries.	2 1 0	H M L

<p>4. The WI Specialist demonstrates and can articulate accurate knowledge of eligibility criteria for state disability, public assistance financial benefits, food stamps, including calculating benefits with wages, knowledge of asset limits and rules, interactions of benefits, IRWEs, and other rules pertaining to employment for beneficiaries, and how to calculate eligibility and benefits for individuals on one of the state Home and Community Based Care (HC-BC) Waiver programs, when applicable.</p>	<p>2 1 0</p>	<p>H M L</p>
<p>5. The WI Specialist demonstrates and can articulate accurate knowledge of eligibility criteria for Medicaid benefits, various Medicaid eligibility categories, including MEAD, and the impact of wages on benefits, asset limits, including accurate calculation of cost-of-care or spend-downs, premiums, exclusions, and other rules pertaining to Medicaid beneficiaries.</p>	<p>2 1 0</p>	<p>H M L</p>
<p>6. The WI Specialist demonstrates and can articulate accurate knowledge of eligibility criteria for Medicare benefits, including application process for Part D benefits, impact of wages on eligibility, subsidies, premiums, QMBY and SLMBY, and other rules pertaining to Medicare beneficiaries.</p>	<p>2 1 0</p>	<p>H M L</p>
<p>7. The WI Specialist demonstrates and can articulate accurate knowledge of eligibility criteria for subsidized housing benefits, including rules for calculating the impact of wages on eligibility and rent payments.</p>	<p>2 1 0</p>	<p>H M L</p>
<p>8. The WI Specialist demonstrates and can articulate accurate knowledge of work-related overpayments and strategies for addressing overpayments.</p>	<p>2 1 0</p>	<p>H M L</p>
<p><b>Competency Area: Identifying and Recommending Work Incentives</b></p>	<p>2-Fully implemented 1-partially implemented 0-not implemented</p>	<p>Priority for Improvement H- High M- Medium L- Low</p>
<p>1. The WI Specialist is able to identify and articulate <i>all</i> work incentives that pertain to and will benefit SSDI beneficiaries, SSI recipients, and concurrent beneficiaries in various employment scenarios.</p>	<p>2 1 0</p>	<p>H M L</p>
<p>2. The WI Specialist is able to identify and accurately describe situations that warrant an application for MEAD benefits.</p>	<p>2 1 0</p>	<p>H M L</p>

3. The WI Specialist is able to identify and accurately describe situations that warrant an application for or exploration of the PASS.	2 1 0	H M L
4. The WI Specialist is able to identify and accurately describe situations that warrant an exploration of the Ticket to Work and Self-Sufficiency.	2 1 0	H M L
<b>Competency Area: Benefits/Work Incentives Management</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low
1. The WI Specialist maintains consumer files in locked cabinets and/or password protected electronic files.	2 1 0	H M L
2. The WI Specialist can produce written plans that are maintained with every person who receives benefits management services.	2 1 0	H M L
3. The WI Specialist can produce a benefits analysis from the BWISS system or from the CWIC (if timely) for every individual who receives WI counseling services.	2 1 0	H M L
4. The WI Specialists can show that their WIP or benefits analyses have been subjected to peer review or review by the WIPA staff.		
5. The WI Specialist maintains and demonstrates an organized system for keeping in touch with every person who receives WI counseling services.	2 1 0	H M L
6. The WI specialist uses a system for tracking and articulating to the beneficiary important touch points and dates (such as the WIPA Calendar and the WIP).	2 1 0	H M L
7. The WI specialist documents important meetings, conversations, and correspondence on behalf of every person who receives WI counseling and management services.	2 1 0	H M L

<b>Competency Area: Communication and Documentation</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low
1. The WI specialist demonstrates the ability to use accessible language in written and oral communication with various stakeholders including people with disabilities, family members, community members, employers, and professional staff, among others.	2 1 0	H M L
2. The WI specialist can produce all relevant signed releases and informational documents for every individual who is receiving WI counseling services.	2 1 0	H M L
3. The work incentives specialists empowers individuals to manage their own benefits, demonstrated by the accurate description of their benefits status by individuals who receive work incentives counseling and management services (and their family members or support persons, when appropriate) and their case managers, employment providers, among others.	2 1 0	H M L
4. The individuals receiving work incentives counseling and management services (and their family members or support persons, when appropriate) can produce and articulate how they use a system for keeping copies of letters and reports, for tracking benefits and wages, and for managing their benefits issues (such as the WIPA calendar).	2 1 0	H M L
5. The WI Specialist has a positive relationship with the local or regional SSA representatives, NH DHHS regional office, regional VR staff, ServiceLink, and other key agencies.	2 1 0	H M L
<b>Competency Area: Research &amp; Use of Resources</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low

1. The WI Specialist can produce a contact list of experts and key individuals in the local SSA, NH DHHS, VR, ServiceLink, area agency, mental health center, and other agencies critical to the work incentives counseling and benefits management process.	2 1 0	H M L
2. The WI Specialist contacts the WIPA CWIC or director for consultation on a regular basis.	2 1 0	H M L
3. The WI Specialist attends, at a minimum, the monthly Benefits Specialist meetings (state level).	2 1 0	H M L
4. The WI Specialist can demonstrate how he or she uses the SSA.gov website, including how to research the disability sections of the website, how to use the POMs, how to find the Ticket section, how to download forms, access fact sheets, etc.	2 1 0	H M L
<b>Competency Area: Professionalism</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low
1. Co-workers seek out and utilize the WI Specialist for appropriate assistance and guidance.	2 1 0	H M L
2. The WI Specialist demonstrates respectful behavior and communication with individuals with disabilities and all others he or she contacts.	2 1 0	H M L
3. The WI Specialist articulates and demonstrates how he or she teaches consumers to be as self-sufficient and self-determined as possible with respect to managing his or her employment and benefit situation.	2 1 0	H M L
<b>Competency Area: Activities, Time Management and Outcomes</b>	2-Fully implemented 1-partially implemented 0-not implemented	Priority for Improvement H- High M- Medium L- Low

1. The WI Specialist can produce evidence that he or she spends a minimum of 50% of his or her time on WI counseling, education, management, and outreach activities.	2 1 0	H M L
2. The WI Specialist has an active caseload of 8-14 individuals who are receiving WI Counseling services (after a 2-3 month start up and outreach period).	2 1 0	H M L
3. The WI Specialist has developed and uses an effective system for scheduling and time management.	2 1 0	H M L
4. The WI Specialist can produce documentation of the benefits profile and analysis, employment profile, wages, calculations, WI recommendations, and benefits changes for every individual who receives WI counseling services	2 1 0	H M L
5. The WI Specialist tracks and assesses counseling “dropouts.” (High numbers of individuals who are not served indicate one of several problems: poor referrals, lack of follow up or follow through, poor communication, individual is not receiving appropriate information, or unforeseen personal or medical problems).	2 1 0	H M L
6. The WI Specialist’s files, documentation, correspondence, and appointments are up to date.	2 1 0	H M L
7. The WI Specialist has adequate office and administrative support to serve 8-14 individuals with high quality WI counseling services at any one time.	2 1 0	H M L

Work Incentives Action Plan

Item(s) to Address	Action to be Taken	By Whom	By When