

# **WORK INCENTIVE NETWORK TRAINING AND CERTIFICATION FOR WIN CONTRACTORS**

WIN Central, the administrative program for the Department of Human Services Work Incentive Network program provides training, certification and technical assistance for those hired by WIN contractors to provide benefits counseling services in Oregon.

WIN Central's training and certification program requires annual recertification for benefits counselors who have gone through WIN Central's training and certification program.

## **INITIAL TRAINING**

Initial training consists of 40 hours of classroom instruction provided in a classroom setting or through a distance platform. The first 40 hours will be for federal and Social Security based benefits.

Graded and non-graded work assignments will be provided to supplement the training, as well as to evaluate how well the information is being comprehended. Additionally, quizzes will be given throughout the training process to measure comprehension and progress.

Passing grades of 90% on the work assignments and quizzes are required to move to the next phase of training.

Failure to pass 90% of the work assignments and quizzes could be an indication that the trainee is not suited to benefits counseling work. WIN Central and the contractor will work together to determine next steps.

Next steps may include additional specific training to address observed issues, beginning again with the Initial Training, or termination.

## **FIELD-STUDY ASSIGNMENTS**

The trainees will be assigned a fake beneficiary/participant for services. They will be asked to help the fake beneficiary/participant through various scenarios as they navigate an employment path. The field study will test the trainee's ability to

analyze and synthesize the information, policies and rules needed to provide services and a report that is accurate and understandable.

The first fake beneficiary/participant is a learning tool. The trainees can ask for technical assistance as needed. This is a training tool to help them synthesize the material they have been studying. The scenario will be reviewed and answers given and discussed during a training webinar following completion of the assignment. Attendance is required.

A second fake beneficiary/participant will be assigned for grade after the first beneficiary has been completed. This second fake beneficiary/participant will be graded, and an 90% score is required to pass.

The trainees may ask for technical assistance and direction, but they must find the answers on their own. They will be allowed two attempts to pass. A second attempt must be taken within five business days of the first attempt.

If they don't pass after two attempts, the training is terminated. WIN Central and the contractor will work together to determine next steps.

Next steps may include additional specific training to address observed issues, beginning again with the Initial Training, or termination.

## **FIRST TEST**

A timed, open-book test will follow the 40-hour initial training and field study assignments. The test is an open-book format to test the ability of the trainees to research needed information, rules and policy, as well as their knowledge of the various federal and local benefits programs. An 90% score is needed to pass.

The trainees will be allowed two attempts to pass the test. A second attempt is allowed within 5 business days of the first attempt. If they don't pass after two attempts, the training and certification process is terminated. WIN Central and the contractor will work together to determine next steps.

Next steps may include additional specific training to address observed issues, beginning again with the Initial Training, or termination.

## **STATE SPECIFIC BENEFITS AND NON-SOCIAL SECURITY ADMINISTRATION TRAINING** (Employed Persons with Disabilities, HUD (housing), SNAP, TANF, Workers Comp and Veterans benefits)

Once the first test is passed by the trainee an additional 24-hours of training will be provided on Oregon specific benefits via an online platform.

Homework will be assigned to assist learning, as well as to evaluate comprehension of the material.

### **SECOND TEST**

A timed, open-book test will follow the additional training. The test is an open-book format to test the ability of the trainees to research needed information and policy as well as their knowledge of the various federal and local benefits programs. An 90% score is needed to pass.

The trainees will be allowed two attempts to pass the test. A second attempt is allowed within 5 business days of the first attempt. If they don't pass after two attempts, the training and certification process is terminated.

### **BENEFITS SUMMARY & ANALYSIS (BSA) ASSIGNMENT**

A case scenario will be given on a fake participant and trainees will complete a Benefits Summary & Analysis (BSA) report based on the information given. A score of 90% is needed to pass.

All trainees who do not achieve a 90% will be allowed a second attempt to pass, and the second attempt is allowed within 5 business days of the first attempt. If a trainee doesn't pass the second attempt, the training and certification process is terminated.

WIN Central and the contractor will work together to determine next steps.

Next steps may include additional specific training to address observed issues, beginning again with the Initial Training, or termination.

## **PROVISIONAL CERTIFICATION**

Provisionally Certified Work Incentive Coordinators will be provided an opportunity to job shadow a seasoned, experienced WIC to observe how WIN provides direct services. This will be done locally if possible, but travel costs will be reimbursed by WIN Central if needed.

All reports for the next six months must be submitted to WIN Central for review before being disseminated to participants. There must be two contacts for technical assistance from WIN Central each week.

A provisionally certified WIC must start to submit a monthly Fidelity Data Tracker once they have provided services for one full calendar month. See [WIN Best Practices Guide](#) for more information about this reporting requirement.

## **FINAL CERTIFICATION**

Three reports for participants the WIC is serving must be submitted for grading, at least one per quarter following Provisional Certification. One report must represent a participant who is receiving SSI only, another SSDI only, and the third report is for a concurrent beneficiary. A passing grade is 90% without using Hot Docs and 95% using Hot Docs.

Provisionally Certified WICs are encouraged to ask for technical assistance and direction, but they must find the answers on their own for the graded reports. They will be allowed two attempts to pass. A second attempt must be submitted within five business days of the first attempt.

If they don't pass each report after two attempts, their Provisional Certification will be suspended. WIN Central and the contractor will determine next steps. Next steps may include additional specific training to address observed issues, beginning again with the Initial Training, or termination.

Once the Provisionally Certified WIC has passed all three BSA report reviews, they will become a Fully Certified Work Incentive Coordinator. They will be certified for one year. They won't need to renew their certification for 12 months.

## **RECERTIFICATION**

All WICs who contract with WIN must be annually recertified by WIN Central. WICs who are CWIC certified by the Virginia Commonwealth University (VCU) must maintain that certification and any additional requirements established by WIN Central.

#### **RECERTIFICATION REQUIREMENTS**

WICs who have a CWIC certification from VCU must maintain their CWIC certification and complete 6 hours of additional training either approved or provided by WIN Central. WICs who are not CWIC certified are required to complete the same number of hours of training required for the CWIC certification plus 6 hours of training either approved or provided by WIN Central.

All training for recertification must be completed by June 30<sup>th</sup> of each year. Documentation of completed training must be submitted to WIN Central.

**Disclaimer: This is a general outline and is subject to change when necessary.**