

**Policies and Procedures
Requirements for ODDS Provider Agency Participation in
Benefits Counseling Certification through
Oregon's Work Incentive Network (WIN)**

The Oregon Department of Human Services (ODHS), Work Incentive Network (WIN), employment service provider agencies and trainees participating in the WIN certification program, agree to promote the trainee's successful completion of the WIN certification program and to ensure that the trainee once fully certified will provide benefits planning services per best practices. In order to achieve these outcomes, the ODHS benefits counseling program, WIN, the program and trainee will:

- Work together to ensure quality benefits counseling services are provided and maintained in Oregon using national best practices.
- Ensure benefits counseling services are only provided by nationally or WIN certified benefits counselors.

WIN will:

- Provide and maintain a benefits counselors training and certification program.
- Provide free technical assistance to the trainee.
- Make available to trainee, once fully certified:
 - WIN sponsored technical trainings.
 - Technical assistance from WIN by email, phone or electronic bulletin board on state specific benefits and work incentives issues.
 - Regular technical assistance calls if deemed appropriate by WIN.
 - WIN tools, forms and database templates.

Program will:

- Ensure the trainee will be provided 4-6 weeks of reduced workload during the initial phase of the certification program.
- Ensure that the trainee will have the support to complete the entirety of the certification program.
- Encourage the trainee to seek technical assistance from WIN central as needed.
- Meet as needed with WIN to review progress in achieving the outcomes and activities outlined within and address any issues or barriers.
- Consider following WIN's suggested processes and tools, including WIN's Benefits Counseling Fidelity Quality Assurance Model.
- Ensure the trainee once fully certified will maintain yearly WIN or other national certification in order to provide benefits counseling services in Oregon.

Trainee will:

- Attend all trainings, conference calls and tests as scheduled.
 - No shows or no calls will result in trainee's participation in the certification program to be terminated.
- Understand that there are typically no exceptions to attendance in the certification program and any exceptions must be pre-approved by WIN and the program; failure to get pre-approval will cause trainee's participation in the certification program to be terminated.
- Understand that a failed test score or incompleteness of any portion of the certification program means that trainee's participation in the certification program will be terminated.
- Provide WIN with three benefits counseling reports to be reviewed for a passing score in order to achieve full certification and will seek technical assistance from WIN as needed.
- Maintain yearly WIN certification or other national certification if they continue to provide benefits counseling services in Oregon.

This agreement neither negates nor diminishes:

- WIN's responsibilities to adhere to ODHS rules and policies.
- The rights of individuals served by WIN.
- Program's responsibilities to adhere to their rules and policies and other federal policies and rules; and,
- The rights of individuals served by Program.