## Introductions and Updates

Rob Pfaff, SSA welcomed everyone to the first quarterly call of 2017 and shared updates.

Staff changes at SSA are occurring in agency leadership with the election and other government changes. SSA is awaiting a nominee for Commissioner. Acting Commissioner Carolyn Colvin resigned in January, and was replaced by Acting Commissioner Nancy Berryhill. Nancy is the prior Deputy Secretary for SSA Operations.

SSA’s Office of Retirement and Disability Policy Deputy Commissioner Virginia Reno has also resigned. Marianna LaCanfora has assumed the position on an acting basis and brings knowledge of retirement and disability programs. She is also very familiar with Ticket to Work.

Rob welcomed and expressed SSA appreciation to the new ENs who have entered the program over the past 3 months to provide beneficiary employment services and supports.

COLA Notices: There is good news regarding the revised annual COLA notices that that now emphasize the TTW call center number and Choosework website. MAXIMUS has reported a substantial increase in the number of calls to the TTW call center since December and January when the notices went out. ENs should also realize an increase in inquiry calls.

Ticket Program performance data: Felix Stump (TPM)

Felix shared comparative calendar year (CY) 2015 and 2016 year-end performance data. ENs are doing more work with more beneficiaries in CY2016 and receiving greater rewards.

* The number of ENs at the close of 2016 was 609 which was four fewer than the 613 ENs at the end of 2015. Despite this slight decline, there was an increase in EN activity on all other performance measures.
* More ENs are engaging with beneficiaries. Assigned beneficiaries increased by 7,532 (+14.2% compared to CY 2015) by the end of CY 2016 reaching a total of 60,260.
* There was an increase of 12,098 (+27.7%) in the number of beneficiaries working and generating payments in CY 2016 as compared to CY 2015. A cumulative 55,652 beneficiaries generated payments over the twelve months of 2016.
* SSA made payments totaling $77.8 million during CY 2016 to ENs for their support of working beneficiaries. ENs earned +16.7 million (+27.4%) more in payment dollars in CY2016 compared to CY 2015.
* The number of beneficiaries for whom cash benefits were not paid for at least one month due to earnings in CY 2016 increased by 4,504 (+31.2%) over CY 2015 to a total of 18,934.

**Guest speaker on veteran’s services and supports**

Sheriene Knox, Ticket Program Manager with Operation Job Ready Veterans, offered a presentation about Veterans and Ticket to Work. She reviewed several topics related to serving disabled veterans including: Who are they? Where are they? What is service connected disability? What is non-service connected pension? What are they looking for and the best place to find them?

The full presentation will be available in the Information Center at: <https://yourtickettowork.com/web/ttw/events-archive>

Contact Sheriene Knox at [sknox@jobreadyvets.org](mailto:sknox@jobreadyvets.org) with questions.

**Annual Performance Outcome Report (APOR)**

Cara Caplan (SSA): The Annual Performance Outcome Report (APOR) compiles annual EN profile and service data. APOR survey links were recently distributed to 447 ENs. To date, 144 ENs have completed the survey which closes on February 28th. All ENs are required, per their Blanket Purchase Agreement (BPA), to provide APOR information each year. Last year SSA terminated 20 ENs for non-responsiveness. The following do not need to complete the APOR this year: VR agency ENs, American Job Center ENs and ENs with an award date after 12/31/2015. For APOR questions or an APOR survey link, send a request to [SSAENAPOR@yourtickettowork.com](mailto:SSAENAPOR@yourtickettowork.com).

**Suitability Requirements**

Cara Caplan (SSA): On January 20th SSA sent an e-mail blast to all ENs reminding them of suitability requirements. Per the BPA, without exception, no ENs or EN/Ticket to Work (TTW) employees and/or representatives who acquire, handle or have access to beneficiary Personally Identifiable Information (PII) are exempt from suitability. Suitability is a Homeland Security and Presidential directive. If you have questions, check <https://yourtickettowork.com/web/ttw/suitability>.

**Staffing updates in OBOES**

Cara Caplan (SSA): The SSA EN Service team is restructuring due to moves and retirements. Carol Cohen is the new Branch Chief for EN Service and the WIPA and PABSS teams.

**WIPA updates, referrals, and technical assistance**

Terry Uttermohlen (SSA): Work Incentives Planning and Assistance (WIPA) organizations provide in-depth benefits counseling to beneficiaries returning to work. There are 83 WIPA projects across the country staffed with trained Community Work Incentives Coordinators (CWIC). The best time to refer a beneficiary to a WIPA is when they have a job or are ready to enter a job. WIPA staff will help the beneficiary understand how employment earnings will affect their benefits. You can find your closest WIPA organization at <https://www.choosework.net/findhelp/>

SSA has a Technical Assistance contract for benefits counseling training with Virginia Commonwealth University (VCU). Many EN staff have completed the VCU training and certification process offered to for Community Partners. Community Partner slots are limited, but ENs are encouraged to enroll and be committed to providing full time benefits counseling to beneficiaries. Training includes a rigorous five-day classroom training followed by seven weeks of on-line tests resulting in a provisional certification, with full certification upon passing reviews of benefits analysis documentation.

In late March VCU will offer a new introductory benefits counseling course (information is at <https://vcu-ntdc.org>). This is an introductory online course that mirrors the topics in the intensive training. It is for those who seek a foundation but are not planning to be a practitioner or those waiting to attend the more intensive training.

**Update on SSA Proof of Concepts (POC) – Benefits Planning Query (BPQY), Wage Reporting and Marketing**

Patrice Mclean (SSA): In March 2015, SSA implemented a POC to centralize SSA’s provision of BPQY requests. Forty-five organizations are participating in the BPQY POC. More than 4,500 BPQYs have been processed in an average time of 1.4 business days. SSA anticipates expanding this project in the next few months.

In October 2016, SSA began implementation of a wage reporting POC. Currently 28 participating ENs submit wage documentation. The Ticket Program Manager (TPM) enters paystubs or wage reports directly into the system used by SSA field offices. The goals are to reduce beneficiary overpayments and expedite payments to ENs. SSA would like to expand this to all ENs when possible.

In April 2016, SSA selected nearly 30 ENs for a marketing POC to receive beneficiary data for outreach purposes. The ENs request certain profile information, such as age range or geographic locale. ENs have 30 days to use data files provided by SSA. To date SSA has released 23 data files. The POC ENs will be invited to a marketing summit tentatively scheduled for March 1st for feedback before next rounds of data are sent.

E-mail your interest in joining the BPQY POC to: [ORDES.BPQY.POC@ssa.gov](mailto:ORDES.BPQY.POC@ssa.gov).

E-mail your interest in joining the wage reporting POC to [ORDES.WAGEREPORTING.POC@ssa.gov](mailto:ORDES.WAGEREPORTING.POC@ssa.gov)

E-mail your interest in joining the Marketing POC to Marketing.supports@ssa.gov.

**Outreach**

Jayme Pendergraft (TPM) Program Outreach Manager provided information on events and new resources.

WISE webinars are monthly events for the beneficiary audience. A different topic is offered each month. The February 22 topic is “Choosing a Service Provider that’s Right for You”. The March WISE will focus on the ABLE Act.

We are always seeking new participants and WISE presenters. For more information, go to [webinars@choosework.net](mailto:webinars@choosework.net).

Two new beneficiary success stories now available at <https://www.choosework.net/success-stories/index.html>.

A new Frequently Asked Questions (FAQ) for people who are blind provides information on the different work incentives for people who are blind and who receive SSI and/or SSDI. The FAQ is at <https://www.choosework.net/library/work-incentives-for-people-who-are-blind>.

The US Department of Education Office of Special Education and Rehabilitative Services has a new Transition Guide to Postsecondary Education and Employment for Students and Youth with Disabilities. You can find it at: <https://www2.ed.gov/about/offices/list/osers/transition/products/postsecondary-transition-guide-2017.pdf>

ENs will soon be able to order a variety of Ticket Program promotional materials. Look for an announcement to be sent by March 6th. The deadline for ordering materials is April 6th.

**Training updates**

Adelle Barr (TPM), Training Manager: The new Learning Management System for online learning is under development. Curriculum is being built in collaboration with SSA. Adelle thanked ENs for responding to requests as we transitioned to Blackboard Collaborate for webinars and look forward to implementing new on-line learning courses in 2017.

Effective Practices presentations will continue to be shared on the Your Ticket to Work website. There is a new topic on “Moving Ticket holders Towards Financial Independence Using Financial Capability Strategies”. See <https://yourtickettowork.com/web-packages-portlet/package/public/Moving_Ticket_Holders_Towards_Financial_Independence/story.html>

**Systems updates**

Katie Striebinger (SSA): SSA is processing the latest e-Pay file received January 26th. Check the Ticket Portal announcement screen for the announcement that the file is complete.

On Feb 2nd, a GovDelivery message was distributed regarding expired System for Award Management (SAM) registrations. SSA cannot pay your EN if your registration has expired.

An issue has been identified which may affect some VR agency Ticket assignments. A QA process is in place to verify Ticket assignment. This issue should not be affecting ENs.

The full transcript and audio from the Quarterly All EN Call are available at <https://yourtickettowork.com/web/ttw/events-archive>.

The next Quarterly All EN Call will be held **May 18, 2017 at 3 p.m. ET**.