

Operator: Please standby, everyone. We're about to begin.

Good day, everyone, and welcome to the Quarterly All VR Call. Today's conference is being recorded.

And at this time, I'd like to turn the conference over to Robert Pfaff. Please go ahead, sir.

Robert Pfaff: Thank you and hello, everyone. Thank you so much for joining the call today. As always, we appreciate all of your efforts and services to our disabled beneficiaries. I wanted to give folks an update on what's going on with our Ticket Program Manager contract. And we have received a couple of inquiries.

What I can tell you, thus far, is that we have extended the current contract to get program manager contract with Maximus to cover this current period. But we are working through some contractual issues that we can't really get into. There's a lot of sensitivity surrounding this type of thing.

But what I can tell you is, for your particular business needs, that the same inboxes and points of contact that you have used in the past will remain for the foreseeable future. And we will also keep you updated and apprised of changes as they come along. So, we will keep you posted on news that we can disseminate with you in regards to the status of the Ticket Program Manager contract.

The only other update I wanted to share is that we're aware that the vaccines are going out for COVID. And there may be some questions about how that impacts our status in terms of SSA, working remotely, and so forth. There has been no change and no communication regarding a change or any timeline in terms of us working from a remote situation. So, everything stays the same. And really, there's no news to report in regards to that. So, that's all I have to share. Again, thanks for joining us.

And I want to turn it over to Katie, who's going to talk a bit about the backlog. So, Katie, would you go ahead?

Katie Striebinger: Hi. Good afternoon, everyone, and Happy New Year. Welcome to 2021 and our first call. I just wanted to give a quick update on the backlog status. And then we'll get to the meat events for today. For our backlog, we have about 8,400 pending cases. Our cases older than 60 days are starting to climb a little and we are well aware of that. But our total is staying steady like it has for the past quarter.

And the next VRCER File should be coming out the first week of February as we continue to follow our quarterly distribution schedule. If you have any questions about VRCER, please do reach out to the VR Help Desk. But you should be getting that piece first week of February.

And that's all I have for that. You know, if you have any questions about the backlog or VRCER, you can ask it at the end of the call at the Q&A. But we are going to move on to the main idea today. And Shada Roper is going to be giving us a wonderful presentation on 301 claims.

Shada Roper: Good afternoon, everyone. We're excited. This is the first call of the calendar year, second quarter of the fiscal year. So, we're very excited. Katie has been just thrilled about the idea of us having this call and going through the process. And we work diligently prior to even the Christmas vacation or the holiday season to make sure that we were able to provide you with this presentation.

I'd like to begin by thanking (Lisa Kelly) from one of our VRs. And she is going to actually lead some of you. And there have been a thousand questions between the Help Desk mailbox, my personal e-mail, and, also, the 301 mailbox on just things that have to do with the portal and getting your claim through. And (Lisa Kelly) has more than been gracious enough to provide us with some slides and information because I sent her 301s all the time.

So, she's always getting an e-mail from me, at least, a few times a month to say, "Hey, you have a potential 301." So, she was able to provide us with some assistance. And she will actually be a part of this presentation towards the end to assist you as the Vocational Rehabilitation Agencies on how to get that 301 claim to me or us so you can receive payment.

Believe it or not, we do have quite a few 301s. And we are studying and learning more about 301. So, we have an exciting presentation for you at this time. And I will turn it over to Adelle to run the slides so you can have this information about 301, the process from beginning to end.

First slide, Adelle.

Adelle Barr: Okay. Here we go.

Shada Roper: For our 301, they begin with our field offices. So, our field offices -- and I know they may not touch you as the processors of the claims or the people who provide us with the claims. But where your counselors are, they begin with our actual local field offices. The field offices are the point of contact for the State Vocational Rehabilitation Agency. They're the ones that begin that whole process. And this process begins with the medical continuing disability review.

So, our CDRs have to do with these 301. And that starts in our local field offices. The field offices, they remark that there is a 301 -- there's a possible 301 with a month, day, and year. And they send it to our Disability Determination Services. And that is also outside of Vocational Rehabilitation. It is our Disability Determination Services, which is our state office. So, those are state local offices. And then you have the federal field offices for Social Security. The field offices will then route the information to the Disability Determination offices. Next slide.

Once that gets to the DDS or the Disability Determination Review, the field offices have an electronic collect system where they handle the CDRs and the medical cessation. So, remember, we have to understand that 301 has nothing to do with SGA. They have to do with medical cessation. So, the disabled persons participated in vocational rehabilitation. They came through your local offices and participated with the state. But it's not that they've been terminated due to any kind of thing having to do with work and earnings. This is absolutely medical cessation. And we're going to go back to that idea of cessation because there doesn't necessarily have to be a termination. So, that's going to come up later. But once this happens, it has to do with nothing having to do with SGA.

So there's no work and earnings involved. And once (Lisa) goes through the slides at the end, you will see that we don't need work or earnings information.

The DDS then annotates the information to say that, you know, there's a possible 301, medical cessation. And then we have these forms. They're copies of these forms because these are the actual forms that we see. So, the SSA-832, the SSA-833, and the SSA-553, these are what we determined that information on and not us as the Vocational Rehabilitation Cost Reimbursement. But that's through our DDS. And then it goes to our Office of Disability Operation which we will get to in a minute.

And yes, we're very familiar with these forms. Some of us actually came from the Office of Disability Operation. So, we understand these determinations. And we were part of the

process in making these determinations. These forms are very familiar to us. And as I said, (Lisa) will fill you in on the back end. She's seeing these forms as she goes through how you get your information to the portal for payment.

Next slide, please.

Adelle Barr: Shada, before we go on, does medical cessation mean the individual no longer has a disability?

Shada Roper: So, what happens in a medical cessation is their disability has ceased. But that doesn't mean that we don't continue their payments. So, there's not a termination. We're going to go through the difference between disability and SSI, Supplemental Security Income and disability. Disability actually has to do with work. And we count quarters of coverage and so forth. SSI is needs-based.

So, once we get into this the cessation, there are terminations based on disability cessation. There are terminations based on not having disability insurance. This is actually to say they have recovered from that disability. Or, for example, I use the blind agencies a lot because I know, blind agencies, they'll give them some kind of surgery. And they're able to then go back to work and become bus drivers or, you know, teachers or whatever the case is. That has limited them for doing the actual -- the type of job that they wanted to do. So, their actual disability is what ceased. So, it's a medical thing.

Adelle Barr: Okay. Now, are there any notifications that go out indicating -- I mean that you have a possible 301 claim?

Shada Roper: And so, we will get to that towards the end, Adelle ...

Adelle Barr: Okay.

Shada Roper: ... how does the information goes out. So, for anyone who needs to know how the information goes out, that's on our last few slides. And for the VRs that receive these e-mails from me, you're very familiar with how you find out that, "Hey, there's a possible 301."

Adelle Barr: Okay. Thanks. We can go on.

Shada Roper: Thank you. Next slide. Okay. So, we have a -- we have another form. I'm sorry.

Adelle Barr: No, just letting you know we were there. Go ahead.

Shada Roper: Thank you. So, there's another form that the field office uses. And it is the development or participation in vocational or similar program form. That is our 4290. So, that is presented, I'm gathering, through the counselors that start these claims. So, that is where the beginning is. That's a form that we also receive that you will see. When you receive this notification, this is one of the forms that you will see that, "Yes, there was development for participation in voc rehab. And there is a potential 301 for the benefits.

Once again, we're still where we are with the field office for development. And then, once we've done all the development with the field office, those are our local offices where the claimants can actually touch. They're physically seeing someone. They're talking to someone.

It is then sent to our Office of Disability Operation. That is our main payment center. And we don't actually see claimants in the Office of Disability Operation. So, it's pretty much like headquarters where no claimants can come on our property. It's literally across the street from headquarters. It is where all the information is then sent through us for electronic servicing through -- that's pretty much what we do. It's all electronic. So, even prior to COVID, these things were done electronically.

So, it was faxing. It was e-mail. It was some other kind of electronic faxing. And then they faxed it through a paperless processing center system. So, all of this is done electronically between the field office and the Office of Disability Operations. We talk -- we talk to each other electronically. We have systems designed for that.

Next slide. Do we have any questions by chance?

Adelle Barr: No, not yet. Go ahead.

Shada Roper: Thank you. Next slide. So, once again, SSA continues. Now, I believe, there was an earlier question about this. Although there's a medical cessation, we continue to pay benefits for time period because we're developing all this information. So, we know that there is medical cessation on file. And we'll get to that because you're wondering how we continue to pay them.

But there is a point in time where we find out this information and their payments have a stop date. And then we continue to pay them because you are participating in the rehab program. And we want to further give you disability benefits. We can't just cut you off like that. We need to really assist you in getting back to work fully.

And once we do all of that, remember, the point of this is to produce savings to the trust fund. So, we have to make sure that you're able to go back to work for a time period -- a good deal of time so that you can actually produce savings to the trust fund and come off our rows -- our Social Security rows, whether it be SSI or whether it be Disability.

Any questions?

Operator: We do have one question in our phone queue if you'd like to take that right now.

Shada Roper: Absolutely.

Operator: Okay. We'll move to (David Lan) with DARS.

Shada Roper: I'm sorry. What was the question? I didn't hear. I apologize.

(David Lan): I'm sorry. Yes. My question had to do with those notifications. We submit our in-use files every month. Many of the cases, at least, for us now are individuals who have yet to turn 18. So, they don't have a Ticket to put in use. I'm just wondering if there's a way to cross reference this files to help alert SSA and DDS that, if someone was going to be denied before that happens, if they saw that they had an active case with VR based on that SSN, the process could be streamlined.

Shada Roper: Is this Maryland?

(David Lan): Virginia.

Shada Roper: Virginia. Okay. This is (David). We'll get back to that in a second because, at the end, we'll explain some more about the 301 and what we're doing with this. So, hold on to that and make sure you come back to me at the end.

(David Lan): Okay. Thank you.

Shada Roper: Thank you.

Adelle Barr: Now, we have no chat questions at this time. We can go ahead.

Shada Roper: Next slide. Thank you. Okay. So, continuing with our Office of Disability Operations, they received the 301s from the field office. As I said, Title II is not quite the same as SSI. That's another program, but it's all disability. However, it's treated a little bit differently.

So, our Title II program is what we say has to do with work and earnings. We count quarters of coverage. We -- all have that. It has nothing to do with need-based. It actually has to do with your work and earnings.

We have what we call a master beneficiary record. And that message should be in a field on this record that we looked at to make this determination that says, "Hey, there's a possible 301. There's a 301 pending. Do not take any action. There's medical cessation."

On the VR side, this is just a message to us. So, remember, we are still not involved because we're tied up in your payment for vocational rehab and your -- the idea of cost reimbursement. So, we're still not any of the main players involved. We get involved towards the end. So, this is still between the field office and our Office of Disability Operations. Next slide.

And the Title XVI cases, that is for our Title XVI records. And the field office, they communicate with the Office of Disability Operations because Title XVI claims are done in our local field offices. So, it starts with our local field offices. It doesn't even matter how the Title XVI claim is done. It has to be with the local field office to provide us with that information. So, even if we had a judge's decision, like ALJ decision, we still would have to say to the field office that represents that claimant, "Hey, this is a Field Office Action, we need you to take action on this and provide us with all this information."

So, the Office of Disability Operation would actually have to have a conversation with the local field office. So, once again, cost reimbursement is still not in the loop at this point in time. We're on the loop on the payment end. We're gathering all this information between the field office and the Office of Disability Operations. We get it towards the end. We have nothing to do with this part of the process. It gets to us later. Next slide.

So, here's your 4290. And this is literally what it says Vocational Rehabilitation Program Development for 301. So, this form also is one of the forms that's going to be one of the forms that come to us in the end and that will be e-mailed to you. So, you have the SSA 553. That's a determination done by our disability examiners. You have the 833 or 832. They're similar forms. That's also done in the Office of Disability Operation. And this is the form that is started out with from the field office and the vocational rehabilitation center.

So, this form is filled out. We have this information; is there an IEP involved, is there an IPE. Like, everything that you can think of is on this form. So, yes, there's an IEP or an IPE. For those of you dealing with the use, you would know the difference between the IEP and the IPE. And all those questions are actually on this 4290. Next slide.

So, with this, then the Office of Disability Operations make a determination. This is with our disability examiner. This form is our 553 form that there are determinations made on. That's what we use in the Office of Disability Operation to make those type of judgments and those kind of benefits or payment calls. So, a disability examiner prepares the notice to send, but don't be confused by it saying the notice of allowance. This is -- this is -- that go in between us. That's not the notice that's going to come to the VR.

So, that's a notice that goes through DDS, Social Security. It's all internal for us making the Disability Determination or having to do with the processing of disability. That is not what comes to the VRs per se. It will go to the beneficiary. It will go to us internally. It will not come to you, the vocational rehabilitation center. That's not the job of the Office of Disability Operations and the DE. That's not what they do. Next slide.

For Title XVI, we send -- and this is all electronic, once again. We use our systems in the Office of Disability to send what we call an MDW, a modernized development worksheet that is sent to the field office. So, one flick, it immediately goes to the field office. And it's over. So, they know, "Hey, there should be something about, you know, some kind of 301 determination." And it annotates on their records. We are able to see these records. And it's a back and forth.

So, these are all electronic things so that we are able to see that there are remarks on this SSI record or SSR, which is a supplemental security record. That, yes, there is 301 involved. The field office, then they have to create some kind of update to the rehab or to the diary. They have the diaries. They set the diaries. They're usually one year. Next slide.

In the Title II cases -- and we have some analysts who are on the line. So, they know. (Candace) will tell you it's supposed to go. And once again, one of our electric files, the disability control file, to say, "Hey, there was some type of issue with 301. We made some kind of decision. There should be a control date. The diary was created for one year." Sometimes, it is not on this file. That's where those forms become so important.

So, we absolutely need that 4290. We absolutely need the 553. We absolutely have other systems that we are able to preview and review through the Office of Disability Operation. So, there are additional systems that we're able to access. Even though we're in the policy office or in headquarters, we're able to access to make these payment decisions on the information. So, if it's not posted to their master record, that's when somebody like myself or (Candace) will go into the disability control files, we'll go, "There's no data on that so we don't know what happened with their medical cessation."

So, we'll look at the forms that were presented to us. If there's no information on that, we've then look in our other Social Security Systems to say, "Hey, this is what's going on with this 301 claim." There's a lot of development and research involved in ensuring your payment when we get to the 301 because they're a little bit different from SGA. Next slide.

Finally, this is where Voc Rehab becomes involved. So, once there's all this development, the disability examination -- the examiner for the Office of Disability Operations, of field office, they've all done everything. They've done their work. They've made this determination. They've gathered things with a judge, with DDS, whoever's making this determination. It's finally then gets to the inbox that we now created.

So, we went through a lot to have this policy process for you. So, even before there was COVID, we had a policy process for you. So, they will then e-mail. And it comes to our specific mailbox. So, I am immediately able to see it, where there's a 4290. That's one of the forms I told you about. There's a 553. There's an SSA 833 or 832. They're similar form. All this information is provided to me for -- through this mailbox, the VR.301.claims@ssa.gov. And it's provided to me so that I then -- this directly comes from the 301 box, the Help Desk of both rehab or myself, Shada.

So, you will have -- and, yes, my personal e-mail. So, it's Shada -- S-H-A-D-A -- T.Roper - R-O-P-E-R -- @ssa.gov. That's when you get that 301 determination notice. I am the one that says to you - and Katie has her signature on it that says, "Hey, we have all this information. You might have a 301 claim. And is there any way you can, like, upload this information so we can see other information?" But that information that there was a

cessation -- a medical cessation or some type of termination is usually on that 4290. That's 553 or that 833. That information is there or it's in other system that I explained that we're privy to by the Office of Disability Operations.

So, we get to all the way to the end, where then it comes to us and we say, "Hey, you might be paid having to do with nothing with SGA. It is a medical cessation. And you, as a VR, could be paid because you actually helped this participant. And we have a medical recovery having to do with your VR assistance."

Are there any questions at this time before I pass it on to (Lisa) to explain to you how to put a 301 through the portal?

Operator: Yes, we do have a question in our phone queue. That's from Eugenia Cox with State of Oregon.

Eugenia Cox: Hi, this is Eugenia. Yes. I've also put this in the chat box. I've -- I've never been notified of a section 301 claim. And I don't know how to get those because I've been doing this for 17 years and never received a notification. How do we get those to start?

Shada Roper: That starts with the counselors and your local Field Office, Eugenia. So, this isn't us. As I said, we get this towards the end after the Office of Disability Operations and the field office actually provided us with an e-mail through that 301 box. Prior to that, we had fax. Because we now have an electronic way, we've actually received a lot more 301s.

In addition to that, Eugenia, we have other programs. So, we have the PROMISE Program, which is part of the reason why (Lisa) was solicited to assist because that state is part of that program and that has to do with our youth. And they tend to be on the SSI end of those 301s. So, that really ...

Eugenia Cox: So ...

Shada Roper: ... has to do with your counselors and your local field office. That part isn't what cost reimbursement does.

Eugenia Cox: Okay. You're saying that our counselors know there are Section 301 claims?

Shada Roper: When they take the information, that would be on them. We -- it starts with your local field office and the VR counselors. It does not get to us until the back end. If ODO, the Office of Disability Operations, doesn't notify us of the 301, we also would not know that there are 301s involved. We are dependent on their determination and the field office's determination.

Eugenia Cox: Okay. So, we have to contact the -- all the field offices in our state to find out who they would be contacting or who would be the contact there to be able to get some sort of notification?

Shada Roper: So, we don't know anything about that, Eugenia. What we know is when it comes from our end, from the Office of Disability Operation. So, I'm not sure what you do in your state. We're not sure what you do with your local field offices. We're saying this is the point when we get it.

So, it has to do with our Office of Disability Operation and our field offices. That's how the information is provided to us. Vocational Rehabilitation has nothing to do with that whole process of determining whether someone is eligible for a 301. That's not what we do. We do cost reimbursement.

Eugenia Cox: Okay. So, if we could get some advice as to how some of these other states are getting the information in the first place, that would be greatly appreciated.

Shada Roper: That would have to be with you and the VR, Eugenia. Like I said, we're getting this from our actual Office of Disability Operation. That's not something ...

Robert Pfaff: Shada.

Shada Roper: ... we are involved in.

Robert Pfaff: Shada, this is Rob. Can I ask a question, Eugenia? Is the issue that, from your perspective, the field offices in your state are unaware of this or what?

Eugenia Cox: Yes, they're completely unaware.

Robert Pfaff: Okay. So ...

Eugenia Cox: If they're getting asked any questions from Social Security, they don't know why. So ...

Robert Pfaff: Okay. So, this ...

Eugenia Cox: Yes.

Robert Pfaff: This is a -- this is an issue, Shada, I think we can take to (Ops SAS) and inform them that this is a -- this is something that we've heard on our end and ask. We do have a lead contact in operations who can check with the field and -- about this matter and then, hopefully, give us some feedback.

Eugenia Cox: Good. Thank you.

Robert Pfaff: And then we can -- and then if we -- if it turns out, there's -- whatever the feedback that we received back, Eugenia, we can pass along when we get it. So, I do think -- and when we do get issues from time to time, in general, about things that may be going on in a field office or not going on that we use this specific contact to address.

Eugenia Cox: That would be greatly appreciated because I think it's just a matter of we just don't know and we don't know who to contact to be able to know. And you know, just to say, "Hey, let's get a process in place," that would be great because then we could at least be able to take advantage of some of these 301 claims. Thank you.

Shada Roper: Thank you, Rob.

Robert Pfaff: Hey, Shada, if you would send me something, I will go ahead and forward it. Okay?

Shada Roper: No problem, Rob. We'll get that to you by tomorrow. No problem.

Robert Pfaff: Thank you.

Shada Roper: Thank you.

Adelle Barr: I love it. Working together. Shada, really quick, exactly how does SSA determine VR involvement? Are they contacting VR for confirmation or the beneficiary?

Shada Roper: I believe that that goes back to the beginning of the process, Adelle. In addition to that, we have -- for Eugenia, we have received 301 that, honestly, somehow, the VRs were able to identify to us that the person is no longer receiving benefits. Very few. But it hasn't been an impossibility. I know our blind states have done that in the past. And it's like, "Hey, how did you know this was a 301?" They were like, "We just knew." And I'm like, "Did SSA send you a notice?" "No, we just found out it was a 301."

So, we are doing better. As Rob said, we probably have to contact our other offices. But this electronic service that we have, as I said, there's been more 301. So, we're actually learning more and we're able to do more 301s. I get plenty now. Before, it was maybe two or three a year.

Now, I pretty much say to Katie, "Yes, I just did five 301s this month. So, I sent out notices for five 301s this month. And next month, it might be eight." And she's like, "Wow. They're eight?" "Yes."

So, we noticed that, once we started working closer to our Office of Disability Operation, we're able to do that and this electronic format has tremendously helped. Like, we went through a lot to have that mailbox and to be able to get that in policy. So, we went through all the chains to make sure that this information can come to us and they're actually tracking this information.

Adelle Barr: Okay.

Shada Roper: Any other questions? Prior to ...

Adelle Barr: ((Inaudible)) in the chat?

Shada Roper: So, (Lisa) is going to show how to put a 301 in the back because I know there are also questions about being able to get those 301s through the portal. We've received them on the Help Desk, in the 301 mailbox, and to my personal e-mail. So, she is going to go through a few slides.

(Lisa Kelly): Thanks, Shada.

Operator: We have no questions in our phone queue.

Adelle Barr: Hi, (Kelly). We'll let -- we'll go ahead and let (Lisa) -- and then we'll -- we'll come back to the question. Thank you.

Operator: You're welcome.

(Lisa Kelly): Okay. Thank you. Hello, everyone. I am going to walk through a few slides that will show you what the screenshots look like for 301. And if we can go to the next slide, you'll have the first slide there. I will say that I first started doing the 301s in December of 2019. And Shada is the one that contacted me about the 301. All of our 301 claims have been participants in the PROMISE grant. So, it is a specific group of people that we've received the 301s for.

So, if you are going into the portal, you would recognize this screen because it's the screen that we always see when we first enter information in the portal. And you'll have all of the information; the Social Security Number, and the beneficiary name, and that it's a medical recovery, on the paperwork that you receive from Shada. And you'll get all of this e-mailed to you. So, you'll have all of that e-mailed to you to know to start the process. So, once you enter all of that information and you check that it's a medical recovery, then you want to go on to the next screen.

So, if we could go to the next slide. On that side, it's just the typical date screen that you always see when you're entering a claim. And we, in Arkansas, do not have Ticket tracker. We have to manually enter every claim. So, I see this every time I enter a claim. But you will have the date that the client entered, and the date the IPE was signed, and the closure date on the paperwork that you received.

On this particular person that I use to do the slides, there wasn't an actual entry date that was listed. All I had was the IPE date. And so, I did place both dates in IPE and the entry date. And it's fine. It -- the system will take that as your -- as your entering in your IPE date. So, next slide, please.

This is the VR information. In any claim that I enter, I always have to just go through this particular screen in order to get to the claim information. Next slide, please.

On the claim information, many things are auto populated. And on this particular case that I worked on, what I did complete is I did enter the Social Security Number. I did enter that it was an initial claim, VA. They weren't blind. They were not needing medical services from us. And then you get to this beneficiary occupation code that we normally put in for

someone that has reached SGA. This was just auto filled with the code of 989 because there are no wages. And so, that will just automatically populate for you when you do the claim. Next slide, please.

Then, on this slide where you entered the direct cost, it looks just like anytime you would be entering direct cost. For the PROMISE grant participants, we really had to look for this information. So, I had to do a little sleuthing on that to get the direct cost. And so, it did take a little bit more time than it normally would to enter a claim because I did have to find all of the costs manually. But, once I calculated the direct costs and also calculated the administrative costs, then I placed those in the appropriate field. The tracking costs just automatically comes up as zero. There were no other costs. And then I entered the total costs and that would what -- be what you would do for any claim. Next slide, please.

This is a little different because, normally, there is some type of expense codes that you can actually get from the drop down list that we have on the -- on the -- in the portal. But, in this particular case, because I knew that it were -- that it was -- the participants were in the PROMISE grant, I knew that there would be pre-employment transition. So, I went to choose the pre-employment transition services. But then, when I got to the Expense Type, you could not select an expense type. There's nothing that you can select.

So, in order to process the claim, I chose the other code, which is 121. And then I entered the service date information, which was based upon the information that I pulled on the participant as to when we provided the service. And then I entered the service amount. And then I just noted, in the actual place where we can add some notation about the cost, that it was for pre-employment transition services and they were part of the PROMISE grant. And that way, it is noted as to what the service was actually for since I couldn't put an expense code in there. Next slide, please.

And then the final thing that you need to do on the portal end is that you just enter some remarks. And it's very simple. You just indicate that it's a 301 claim. And then you can submit it. And it's in the -- in the portal at that point. After you submit the claim, you will want to go ahead and get your fax cover sheet because you need to fax back to the portal. Or, say, to review, you need to fax the forms that she sent to you. And you need to have all of your documentation that you would have to show what the expenses were.

And so, what I sent in this particular case were pay stubs that we had on the individual spreadsheet where we had paid the work experience costs for this individual. And that's what I faxed back to her. And that is the way that you do a 301 claim. In many ways, it's

very simple to do it, unless you have to do a little searching for the cost. And that's the end of the presentation.

Adelle Barr: Thank you, (Lisa). A good question for either yourself or Shada, if you're a part of the PROMISE Program, would you get 301 notifications from Social Security? And if that's the case, well, how do we get more information about the PROMISE Program?

Shada Roper: (Lisa) or Rob, do you want to speak on that? Because that was a program that -- I believe we are at the end of that program. But I will let (Lisa) speak on the timeframe for that program maybe.

(Lisa Kelly): We are. We did reach the end of the program. It was a five-year grant that the -- I think there were five states that received the PROMISE grant and Arkansas was one of them. It started in 2014 and it did conclude in 2019. So, it is gone. And I don't know that there's any thought that there will be anything else like it, but it is a program that has ended.

Shada Roper: Rob, do you have any information to give us on such a thing? I don't know if you would know.

Robert Pfaff: No, I don't have anything to add to that. But I can -- we can get more information about the status of PROMISE and share it with either the questioner or the group as a whole.

Adelle Barr: Thank you.

Shada Roper: Do we have any other question?

Adelle Barr: We do, Shada. How would you fax information if you're not in the office?

Shada Roper: I'm not sure what each state does. But we compare this to a PVR or as we needed C3 information for transitional work. So, it's the same type of process. Katie and I and, I believe, (Patrice) is also involved. Our Deputy Director, Raquel knows about this as well. We are working on a way to help you out.

So, (Patrice) is very aware of the needs for the information for 301. Getting faxed into the information that we have faxed into the system. And I'm sure Rob has been briefed by (Patrice). So, we are working on a way for SSA to do it as now. But we're also working

remotely. So, I know (Lisa)'s had several problems. And Katie has granted timely (filing) taxes and things like that because we also have system issues with the 301.

So, pretty much, once I send you the email, just do your best to get as much information as you can in the claim at least so that we can get back to that. We hold it. And you will have the file and grant and so forth. But I know our deputy director was working on a way for us to make sure that we were the ones responsible for that portion of the information if there was absolutely no way for you to have that in.

And the payments, as I said, they're done a little bit differently. So, because Katie is more than aware of what's happening, that she is granting timely (filing) reprieves and things of that nature because the 301s are just a little bit different.

Adelle Barr: Okay. Thanks, Shada. Are there any states submitting 301 claims through the XML submission file?

Shada Roper: That would be for the states to answer. I have no clue. I'm the one that just sends the e-mail. So, I have no concept of that. I just know -- I send a notification to say, "Hey, I was in contact with our disability examiners and the Office of Disability Operation made me aware that there's information that there is a 301 with all these forms and so forth." So, I have no clue if they're doing it that way. I know the way (Lisa) does it.

And there are actually a couple other states that are involved that -- Wisconsin is a big one that I send a lot of 301 information to. So, there are a few states that are PROMISE states, but I've actually had some that are not. I know Pennsylvania, also, receives 301 e-mails from me.

And as I said -- and Rob spoke on this earlier, we are going to investigate if there's a way for us to have more. But we are tracking this information all the way up to the commissioner level.

Adelle Barr: Thanks, Shada. And I think there was a little clarification. It just wants to say that, I think, there could be confusion with the term field office. There was a question that came up after that last person who asked the question. It sounded like she was possibly thinking that the field office meant their Regional VR offices. So, that was just the one that I wanted to make sure that we were on track with that. So, thank you for that.

And is there any chance that SSA can notify the State Vocational Rehabilitation Agencies of these 301 cases?

Shada Roper: As Rob said earlier, we'll do some more investigation. And we're going to work with our other components that would be a part of this process. So, once this meeting is over -- Rob is our director. So, he will get information over to make sure that if there's a way to streamline this, and make this smoother, and, potentially, give you more payments that don't just have to do with SGA involvement, that we will do everything that we are able to ensure that you are able to have these possible 301 payments.

Katie requested this training just because we knew that a lot of folks didn't know about 301. And by the time we went through this policy change and did everything we could to streamline with our Office of Disability Operation, we realized we were getting more. And as I said, we're tracking all this information.

So, Rob is our person of -- obviously, he's the person that is able to help us so that we are able to give even more payments based on 301. And there is research being done on this. And Rob is part of that research and well aware of what's happening with that. So, that's why we want to contact our other offices.

Adelle Barr: Sounds good. Thanks, Shada. At this time, let's go ahead and continue with the agenda. And we'll bring Raquel on.

Raquel Donaldson: Thank you, Shada, again, and (Lisa) and Adelle for the presentation. Greatly appreciated and greatly needed. Happy New Year everyone. 2021 is here. I just have a few quick things.

So, for the cost formula training, that is something that is supposed to happen next Tuesday, the 19th, at 2:00 PM. And I'm so grateful to Eric Schmidt from the Maryland VR for even offering to do something like this to help out the VRs that are still a little confused with the new cost formula now, now that there's only (ACP) that actually started Fiscal Year '20.

The Fiscal Year '21 information has gone out and you have until April 30th to get the information back into me. If you feel like you need an extension, that's fine. You just reach out to me and I'll be more than happy to provide you with that extension.

If you have any information or any questions in regards to next week's training, I urge you to reach out to Eric directly via his e-mail or his phone number, which you have on your new state VR directory that went out yesterday. So, again, Eric Schmidt is with the Maryland VR.

IPE, just quickly on that, right now, we are doing -- if you're missing the signatures on your IPEs, that is something that we're reaching out to you now to inform you of. We have to have -- and this is from day one. We have to have signatures on the IPE. Again, you'll receive a message from me, an e-mail from me just giving you all the contact information as far as the name and the Social Security Number. We do accept electronic signature. And we just ask that you take that information, that requested documentation and send it back into us via the portal. Do follow up with me on my e-mail to inform me, one, that the information has been uploaded or, two, you don't have that information, documentation gets destroyed, things like that.

Until that time, just know we do not or will not be (knocking) any claims that's missing IPE signature. We place the claim back on hold until we get back from you and you're going to tell us, "Hey, it's here now or go ahead and deny it." So, I think my phone is going to die. I apologize for that. So, that's -- that's about it. You're not going to be denied automatically for not having -- missing the signature on the IPE. It's going to be placed in diary until you send the information back to us.

590 denials, I know a lot of you send in your earnings information when you're sending in your claim. I just need for you to make sure when you're sending your earnings via fax that you're checking to confirm. Even though you might get a paper confirmation of your fax, you should check the portal to confirm that the information is actually there. It's actually showing up there because, when the technicians or the analysts go to review the claim and they see a note from you saying, "Hey, documentation has been faxed," then we go to a certain location. If we see something that says -- it might be blank when information never got there. It might say waiting for fax. Then they end up denying you for the earnings not being there. And that's how you get to 590 denials.

And also, in regards to VRCER being your way of tracking your earnings, just remember to place in the remarks -- on the remarks tab, the word VRCER. That's all you need. And keep in mind that VRCER is quarterly earnings. So, it does not guarantee you that you're going to get paid on that claim. I get a lot of e-mails on the Help Desk saying, "Hey, my earnings came from VRCER. Why did I get a 220?" Again, it's because it's quarterly earnings. So, we may have documentation information showing monthly earnings were

one of those quarters may have two out of three of the month that are at or above SGA. So, it's missing something, which is why you'd be denied 220. So, that's just an FYI on that.

For the reconsideration, I'm going to go ahead and turn it over to (Chauna Dixon). She wants to just let you know about the new denial code for reconsideration. (Chauna)?

(Chauna Dixon): Good afternoon, everyone. This is just a quick reminder. Some of you may have already started receiving the denial code of 621. This is a new code we're using to deny claims when more than one reconsideration is received for a claim, which was denied due to earnings for the same period. Last year, we did it advise that this would be in effect. However, fortunately for you guys, with the systems issues, you will just begin to see this code if you haven't already.

If you feel, for whatever reason, that you have received this denial code in error or you would like some more information on it, feel free to -- feel free to reach out to the VR Help Desk and Raquel can definitely help you with that. Okay. That was it for me. Thanks for Raquel.

Raquel Donaldson: Thank you, (Chauna). And lastly, you'll all receive the updated state VR directory. I believe I emailed out -- that out yesterday evening. And I just want to urge everyone to use that directory. A lot of times, there's information that we don't have on this end that you can reach out to another SSA coordinator that's listed in that directory, you know, in regards to the tracker. You know, when I get e-mails in regards to the tracker, I don't have access to the tracker. So, it might be something that I don't know that one of your fellow SSA coordinators in a different VR would know.

So, I always urge new SSA coordinators, people coming in new from the VRs to take advantage of that directory. Reach out to other people maybe in VRs close to you. I know some of you tried to kill me because I do refer some of my more veteran SSA coordinators that know their stuff. I refer them out all the time. They'll look and see an email and I'll have them CC'ed on it saying, "Hey, call this person."

You know, it's a compliment. I'm just saying you know your stuff. So, take advantage of that VR directory, please. That's why I update it for you guys every six months. And thank you for the -- for everyone who responds in a timely manner and gets that information to me by the deadline. I appreciate you. And that is all that I have. We want to go ahead and open up the call for questions and answers. It's almost the end of the call.

Operator, do we have anyone that still has a question?

Operator: We have no one in our queue at this time. But, just a reminder, it is star one if you have a question or comment. That's star one. And just a reminder, please make sure your mute function is turned off to allow your signal to reach us. And we'll pause a brief moment.

Adelle Barr: While we wait for that, was there an e-mail sent about the cost formula training?

Raquel Donaldson: Yes. I couldn't hear you.

Adelle Barr: Can you hear me now?

Raquel Donaldson: I can.

Adelle Barr: Okay. Was -- so, I think the response was yes, that there was an e-mail that's sent -- that went out regarding the cost formula training, correct?

Raquel Donaldson: I do not know. Again, this is something that's spearheaded by Eric Schmidt in the Maryland VR. I was just suggesting, if you had questions or wish to participate, to please reach out to him directly at the VR. And I'm sure he'd be more than happy to answer any questions and give you details on it. I do not have details other than it's next Tuesday, the 19th, at 2:00 PM.

Adelle Barr: Okay. I have one more question here. Are the IPE signatures for the PVR? That was a couple of slides back.

Raquel Donaldson: Any IPE that we request documentation on, PVR as well has to be signed. They should always be signed anyways by the client and the counselor anyway. So, yes, the PVRs as well. When we ask for documentation, and the IPE has to be included.

Adelle Barr: All right. Sounds good. And that would be all of the questions.

Shada Roper: To piggyback off of -- this is Shada. Sorry. This is Shada. Those IPEs with the transitional work, we're not asking for wet signatures. We're just asking for some kind

of copy of the signature. We absolutely have to have that time where we know -- we have a lot of pending claims having to do with transitional work. So, anytime we request additional information, we are seeking a copy of a signed IPE.

Adelle Barr: Thank you, Shada. (Are there) information regarding the cost formula training? It is -- excuse me. The CSAVR SSA to get to work the CR workgroup. And they are in the process of setting up a Zoom. And it's one more question regarding that. What - which time zone will the training be on Tuesday?

Raquel Donaldson: Eastern Standard Time.

Adelle Barr: Okay. Thanks. And that's all I have here in the chat.

Shada Roper: (David), you had a question earlier about the 301. If it was not covered in the later presentation, please feel free to e-mail me or e-mail the 301 mailbox. And we will get you the answer on that. Thank you.

Adelle Barr: All right. I just want to thank everyone for their time today. Quick reminder that our next call will be April 13, 2021, 1:00 p.m. EST. As always, I will reach out to you all to request any topics or issues you'd like to have discussed on the agenda. Thank you.

Operator: Everyone, that concludes our conference call for today. We do thank you all for your participation. You may now disconnect.