

Welcome and SSA Updates

Rob Pfaff (SSA)

Robert Pfaff welcomed everyone to the call and provided the following updates:

Ticket to Work (Ticket) Program data

Analysis of data so far in fiscal year (FY) 2021 shows that the Ticket Program is doing well in terms of Ticket assignment and program participation.

- Ticketholders have assigned 17,137 Tickets to ENs so far this FY year as opposed to 16,650 in FY 2020.
- ENs are averaging 505 Tickets assigned versus 494 in FY 2020.

TPM contract status

Social Security is still reviewing the award for the Ticket Program Manager (TPM) contract and working through technical issues. Maximus continues to be the TPM, performing business as usual, and Social Security will share updates when these updates become publicly available.

Employment Summit

Social Security is finalizing next steps to hold a virtual Employment Summit and has submitted a plan to Social Security executive leadership. The Summit will focus on developing relationships with employers to connect Ticketholders to jobs. Rob has been meeting with Ticket Program service providers and other stakeholders about ways to connect and partner with employer groups. The Summit will have representation from all aspects of the Ticket Program, including ENs, state Vocational Rehabilitation (VR) agencies, other stakeholders, and employers.

Benefits Planning Query (BPQY) changes

Patrice McLean (SSA)

Patrice explained the purpose of the BPQY statement, which is to provide details about a beneficiary's benefits status and earnings. She also reviewed recent changes to the BPQY statement and upcoming changes to the fulfillment process.

BPQY statement changes

- Yearly Internal Revenue Service (IRS) earnings are no longer available on the BPQY.
- Legal counsel recently informed SSA that Form SSA-3288 is not sufficient under

IRS regulations to release the IRS earnings information.

- A different authorization form (SSA 7050) is available but requires a fee for it to be released to third parties.
- Nothing else has changed on the BPQY.
- Beneficiaries can view their complete earnings record on their *mySSA* account.
- Please encourage Ticketholders to open a *mySSA* account.

BPQY pilot

In 2015, Social Security implemented a pilot to provide BPQY statements to Ticket Program service providers. The purpose was to research the BPQY process and policy as needed.

Social Security has completed that evaluation and will soon end the BPQY pilot. Social Security will provide more details and information via email prior to ending the pilot and will continue to look for ways to improve the BPQY fulfillment process.

EN updates and reminders

Cara Caplan (SSA)

Work Incentives Planning and Assistance (WIPA) Grant Solicitation

Social Security is currently reviewing applications in order to award the next round of WIPA grants. The application period closed on April 19, 2021, and awardees will provide services beginning July 1, 2021.

Virginia Commonwealth University (VCU) Work Incentives Training

SSA encourages EN staff to attend initial training and achieve and retain certification as a Community Partner Work Incentives Counselor (CPWIC). Please note the following important considerations for completing the training and certification process:

- CPWICs should provide at least 16 hours per week of individualized Work Incentives counseling to Social Security beneficiaries.
- The CPWIC initial training course is intensive, with 40 hours of instruction, combined with several weeks of follow-up learning and assessments.
- Recent feedback indicates the training is good but stressful for people trying to complete their other work duties at the same time.
- All trainees must have:
 - Suitability determination;
 - Good analytical writing and people skills;

- A clear calendar to focus on the training for at least the first 3 weeks;
- Commitment to devote the time necessary to complete all training and certification requirements.
- Provisional certification does not allow staff to start working with beneficiaries. Staff must have full certification.
- When registering, EN staff should clearly indicate that they are EN staff.

Find more information about the [CWIC and Community Partner Initial Training](https://vcu-ntdc.org/training/initial/initial.cfm) at (<https://vcu-ntdc.org/training/initial/initial.cfm>).

Administrative EN suitability reminder

Social Security requires all persons working under a Ticket Program Agreement (TPA), including Administrative EN affiliates, to have a positive suitability determination to work in the Ticket Program. Not having suitability is a violation of the TPA.

Find Help update

The Find Help tool now includes a hyperlink within the EN profile. Each EN name links directly to the EN website. Additionally, the Find Help tool also identifies ENs with certified benefits counselors on staff. ENs can update this throughout the year when staff becomes fully certified.

EN business models

Ana Morales (TPM)

Ana explained the differences between the various EN business models.

- Traditional EN
 - Provides employment services and other support services directly to the Ticketholder
 - Most ENs fall into this category
- Employer EN
 - Serves as the Ticketholder's employer OR
 - Serves as an employer agent
- Administrative EN (AEN)
 - Functions as an EN of record for Ticket assignments, payments, and administrative requirements
 - Ticketholder services are provided by provider affiliates
- ENs may operate more than one business model. For each business model operated, ENs must have separate:
 - EN names

- Data Universal Numbering System (DUNS) numbers
- System for Award Management (SAM) registrations
- ENs must apply to operate more than one business model
 - Complete Part III Section 1.B.2 and Part V of the EN RFA for each business model.
 - Submit to enservice@ssa.gov for approval.

Presentation slides contain additional details.

Outreach update

Patricia Van Nelson (TPM)

Social Media Advertising

Pat reviewed how TPM implements various social media activities and shared some recent results:

- Google call-only ads direct several hundred recipients weekly to the Help Line.
- In 2021, Facebook ads sent 11,256 people to the Choose Work website and generated 4,856 shares and 3,191 comments.
- TPM sends a text message each month to drive traffic to different parts of the Choose Work website. To date, 9,100 people have opted in.
- TPM posts daily social media posts (Facebook and Twitter) to promote and highlight Ticket Program information, resources, and materials.
- TPM publishes a weekly blog post. The average viewership for recent blogs reached slightly more than 6,000 unique page views.

Fact Sheets

Ticket to Work fact sheets provide useful information about the program and other Work Incentives. Recent fact sheets include:

- Medicaid and Medicare Employment Supports
 - <https://choosework.ssa.gov/library/fact-sheet-medicare-and-medicaid-employment-supports>
- Updated: Trial Work Period
 - <https://choosework.ssa.gov/library/fact-sheet-trial-work-period-twp>
- Virtual Service Delivery
 - <https://choosework.ssa.gov/Assets/cw/files/Library/2021/fact-sheet-virtual-service-delivery.pdf>
- What is Social Security's Ticket to Work Program?
 - It will be published in June.

Work Incentive Seminar Event (WISE) Webinar

Information about the next WISE webinar:

- “Working from Home with Ticket to Work” is on May 26
- Register at choosework.ssa.gov/wise
- View previous webinars at WISE On Demand:
<https://choosework.ssa.gov/webinars-tutorials/webinar-archives/index.html>

Ticket to Work Success Stories

ENs can submit information about success story and stepping stone story candidates that meet the following criteria:

- Success stories feature individuals who achieve financial independence with the help of the Ticket Program.
- Stepping stone stories feature individuals who are on the path to financial independence but have not yet eliminated their reliance on benefits.

Send candidates for stepping stone and success stories to Stories@choosework.ssa.gov.

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https://public.govdelivery.com/accounts/USSSA/subscriber/new?gsp=USSSA_6
- Additional details are available on the presentation slides.

Questions/answers

A question and answer period followed, which is part of the call recording and transcript.

Next call

The next Quarterly All EN Call is scheduled for Tuesday, August 17, 2021, at 1 p.m. ET.