

Welcome and SSA Updates

Rob Pfaff

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

Multistate VR Workgroup

As a result of the June 2019 Employment Summit, stakeholders talked about critical steps in the lifecycle of working with individuals with disabilities and helping them go back to work. The workgroup has representation from 9 state Vocational Rehabilitation (VR) agencies: California, Kentucky, Maryland, New Jersey, Utah, Vermont, Virginia and Wisconsin. Brian Connors and David Leon have been leading the efforts and put together 5 recommendations for discussion that came from the summit report. They are:

- Improve language in Social Security's notices. SSA is aware that this is problematic in some instances and that the issue is complicated.
- Have access to Beneficiary's data and contact information.
- Provide training for local field office staff.
- Broaden the focus of the program to include part-time work, and remove disincentives for working with individuals receiving SSI.
- Strengthen the relationship between employers and stakeholders; VRs and Employment Networks.

SSA Leadership Changes

As of Friday, July 9, Kilolo Kijakazi is the new acting Social Security Commissioner over the Office of Research, Demonstration, and Employment Support. She replaces Andrew Saul. Stephen Evangelista, formerly serving as the Assistant Deputy Commissioner, has been elevated to Acting Deputy Commissioner. Due to leadership changes, some of the key elements for the summit have yet to be decided. SSA was tentatively looking at late September to have the summit, which is going to be virtual.

State Verification Exchange System (SVES)

Laura Mezzanotte

Laura responded to 3 questions previously submitted for the call:

1. **Beneficiary receiving benefits under someone else's records when the Beneficiary Identification Code (BIC) code or an SVES is not shown**

There are some limitations with the SVES system. SVES will generate a title to respond for a BIC when the individual's SSN is used in the input record. If the individual has previously been denied or not SSN, and applies as an accelerate or another account, SVES will generate a response on the denied SSN. In some cases, an (ex-rep) entitlement number and BIC will appear on the title to WTPY response. So that's your WTPY response, which enables the state to resubmit through SVES using the (CAN-BIC) combination.

2. **Date of birth**

There are tolerances in the system because a lot of the information is input manually. There are, for reasonable transposition, typing errors. SSA does not disclose tolerances.

3. **Dual entitlement**

Dual entitlement means that an individual is entitled on their record and somebody else's.

VR Update and Reminders

Cara Caplan

New Work Incentive Planning and Assistance (WIPA) awards

Congress authorized and set funding limits for WIPA with the Ticket to Work and Work Incentives Improvement Act; unfortunately, funding has remained the same since 1999. To circumvent this problem for the next five-year cycle, SSA made a gradual reduction in the number of awardees in order for projects to minimize their overhead cost. This year, SSA awarded 74 new WIPA agreements. These are cooperative agreements, which means Social Security has a little more oversight of them than a normal grant would be. The new awardees began service on July 1, 2021. Some of them are not accepting referrals yet. In the meantime, other WIPAs are assisting with referrals.

Cara also reminded VRs that the WIPA training and technical assistance contractor, Virginia Commonwealth University, offers benefits counseling certification. It is open to VR agencies for free through the agency. For more information, check the VCU website.

For questions about WIPA, please send an email to wipa@ssa.gov.

Patrice McClean

Benefits Planning Query (BPQY) pilot

After six successful years, Social Security is discontinuing the BPQY pilot on July 16, 2021. The evaluation of the pilot is complete and recommendations for improving the process were shared with executives.

Disseminating BPQY was not a core function of the Office of Employment Support or rebranded the Ticket Program and VR Cost Reimbursement, among other things. Since SSA can only distribute BPQY to a small population of employment support providers due to limited staffing resources, and are not yet able to distribute BPQYs to all employment support providers, SSA is discontinuing the pilot and directing pilot participants to obtain BPQYs through normal procedures.

Patrice reminded VRs that the Red Book is available with information as to how to obtain a BPQY and that it is a guide for Work Incentives. For more information about how to request a BPQY, or for Work Incentives in general, please go to ssa.gov/redbook.

Beneficiaries can request the BPQY by contacting the local Social Security Field Office at 1-800-772-1213 or TTDY 1-800-325-0778. Send questions to Ordes.bpqy.poc@ssa.gov

Shada Roper

Six-year record retention policy

Shada reminded VRs to adhere to their internal schedule and RSA requirements for document retention. Social Security requires VRs to keep the records for 6 years as stated in official notices. Social Security needs case notes, IEPs or written rehabilitation plans, receipts and all case documents. If the documentation is not available in the case of audits, Social Security would have to recoup any payments made to VR agencies.

Katie Striebinger

Backlog status, SSA secure portal storage, Electronic signatures

Katie provided the following updates:

- **Backlog**

There are currently 5,500, roughly, cases pending. SSA is continuing to work on a first-in, first-out processing status and are currently working on April 2021 claims. If SSA requires other information from VRs, Katie advised VRs to watch for that because SSA will not reach out again for the information. The VR's case would

remain where it is until the VR updates it.

- **SSA secure portal storage**

The portal ties directly to SSA's record keeping system (iTOPSS), where we process all VR claims. The information in the portal goes back to the beginning of VR payment. Any payment requested from Social Security is available in the portal. Client lists go back to the beginning of SSA's records.

- **Electronic signatures**

SSA does accept electronic signatures now, especially since last year and will not accept typed names. It has to be clear that it is a signature and endorsed by the individual.

Raquel Donaldson

Diaries, Staff updates, VR directory, Non-pay status codes

Raquel shared the following updates:

- **Diaries**

SSA will continue to place all the diary on the extended hold until further notice. However, if you do receive a 650 denial without hearing from Raquel first, please email her at the VR Helpdesk as it may be a system error. Also, there may be instances when additional documentation is requested from the VRs and the case is denied. There could be different reasons that SSA cannot identify while processing the case until the end. For specific questions, please email VR.Helpdesk@ssa.gov for a more detailed explanation.

- **Staff updates**

If a staff member that has access to the portal may be retiring or leaving the agency, reach out and inform the VR Helpdesk to remove that individual's access to the portal.

- **VR directory**

SSA will update the state VR directory. The usual process is to send it to the regional coordinator for distribution. If you have any updates or corrections, send those back to your regional coordinator prior to July 30.

- **Non-pay status codes**

There are only two codes -- N01 and N04 that we will pay for cost reimbursements

because these earnings or resources are related to suspensions. All other N codes mean that they are due to a federal benefit amount and are considered terminated and you will not get paid.

Questions/Answers

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

Next Call

The next Quarterly All VR Call is scheduled for Tuesday, October 19, 2021, at 1 p.m. ET.