

**Operator:** Good day 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 Rob Pfaff. Please go ahead sir.

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**Rob Pfaff:** Thank you. And good morning/good afternoon to all of you who have joined. Thanks for giving us your time today.

First thing that I will mention of note is we have a surprise addition to the agenda today. Cara Caplan is going to speak after (Laura) in regard to the new WIPA Awards that we recently made, just to give us an overview of how many projects were awarded and so forth. So that's the one item that I wanted to add to the agenda so that you're aware.

I want to open up and talk about a multistate VR workgroup that has formed. And the purpose of this workgroup was to discuss the recommendations which came from the 2019 Employment Support Summit that occurred and was held onsite way back in the pre-pandemic days when we could meet in person.

This summit was held, for those of you who may not know, onsite at the Social Security Administration. And it occurred in June of 2019. And it was a representation of a variety of Ticket to Work stakeholders who met for two days to talk about, really, the critical steps in the life cycle of working with an individual with disabilities and helping them go back to work.

So as a result of the summit, a summary report was put together and distributed to everyone, all VRs, all ENs, et cetera. And out of that report were some recommendations for further action.

And the workgroup is a representation of VR agencies that consist of the California, Wisconsin, Virginia, Maryland, New Jersey, Utah, Vermont, and Kentucky VRs. And this group has been led by Brian Connor and David Leon. Brian from California and David from Virginia. They put together five recommendations for discussion that came from the summit report. And so these recommendations consist of — and they're really kind of goals.

First being, improving notice language in SSA's notices which we are aware, in some instances, are problematic and it's a complicated issue, to say the least. But certainly a good idea to try to improve the language where we can.

The second goal being having access to beneficiary data and contact information. The third being providing training for local field office staff on SSA's return-to-work programs. The fourth being broadening the focus of the program for part-time work and the inclusion of part-time work, along with removing disincentives for working with individuals receiving SSI.

And the fifth being strengthening the relationship between employers and the Ticket to Work Program stakeholders — the VRs and the Employment Networks. And that is — that last piece is, as you're probably aware, something that we are keenly working on currently with the plans leading up to the Employment Support Summit.

And so I will also add to you, for those of you who may not know, and this ties directly into the Employment Support Summit, as of Friday of last week, we have a leadership change in the agency that I will share with you.

Kilolo Kijakazi, who was serving as our Deputy Commissioner over the Office of Research, Demonstration, and Employment Support, has been elevated into the role of Acting Commissioner and has replaced Andrew Saul as the Acting Commissioner for the agency.

In addition, we just received notification a few moments ago, which is breaking news, that Stephen Evangelista, who has been serving as our Assistant Deputy Commissioner has been elevated to the Acting Deputy Commissioner position.

So while folks are moving into new jobs and acclimating into their new responsibilities, some of the key elements that we were putting together in terms of the plans for the summit have yet to be decided upon.

So we're still working through those issues. We will obviously communicate with you when we have the plan finalized to move forward with the plans. But for right now, we're what I would consider in a holding pattern for the Employment Summit.

We were tentatively looking at a late September date for having the summit. And the summit was going to be virtual, a Virtual Employment Summit.

So that's all of my updates that I have. And so what I'll do at this point is turn it over to Adelle and we'll go ahead with the rest of the agenda.

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**Adelle Barr:** Thank you very much, Rob. And I'd like to introduce (Laura) who's going to speak to us about the SVES.

**Laura:** Hi there. Does that mean I'm on now?

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**Adelle Barr:** Yes, ma'am. Thank you.

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**Laura:** Okay. So I do see that you have several questions for us for the SVES system. And I'm going to try to answer them as best as I can. Some of these things are beyond my thing and I'm going to try to find out if I can respond back to them in writing to you for what I cannot answer.

But there were some questions. The beneficiary receiving benefits under someone else's records. However, they were saying that it doesn't show the BIC code or an SVES.

We're going to need a little bit more detail of what's going on. 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 to state to resubmit through SVES using the (CAN-BIC) combination.

Does that help you with anything with your question, about the first question?

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**Raquel Donaldson:** Laura, they're not going to be able to respond to you until you're finished and we open it up to them for questions and answers.

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**Laura:** Oh, okay. Okay. And then number two, the date of birth. We do have tolerances in there because a lot of the information is manually input. So, we have, for reasonable transposition, typing errors and what have you. We do not disclose what our tolerances are but there are tolerances.

And as for question number three, with the dual entitlement, it means that this person is entitled on their record and somebody else's. So we need to know what else you're looking for with dual entitlement.

And that's pretty much what I have to say on these three questions. So if you want to open it up, and if people want to answer — ask me questions, that would be fine. And

then I can write them down and see if we can get some more details for you.

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**Raquel Donaldson:** Yes. Thanks, (Laura). Operator, can we go ahead and open it up just for questions on SVES please?

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**Operator:** Thank you. If you would like to ask a question, please signal by pressing star one on your telephone keypad. If you're using a speaker phone, please make sure your mute function is turned off to allow the signal to reach our equipment. Again, that is star one to ask a question. We'll pause just for a moment to allow everyone the opportunity to signal for questions. Thank you.

It appears there are no questions at this time.

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**Raquel Donaldson:** All right. If anyone comes up with any questions in the future, feel free to e-mail the VR Helpdesk and we'll get those questions over to Laura. Laura, I just want to thank you for taking the time out to come and join the call.

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**Laura:** Well, thank you. And if you come up with anything, please let me know.

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**Raquel Donaldson:** Absolutely. Have a great afternoon.

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**Laura:** Okay. Thank you. Bye-bye.

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**Raquel Donaldson:** All right folks. So we're going to keep things going. And we're going to welcome Cara Caplan to the call. Cara is going to discuss the new WIPA awards. Cara?

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**Cara Caplan:** Good afternoon, everybody. Just to give you a little bit of background, as most of you know, Congress authorized and set funding limits for WIPA with the Ticket to Work and Work Incentives Improvement Act. And unfortunately, funding has remained level since 1999.

So in order to circumvent this a little bit for this five-year cycle, SSA made a gradual reduction in the number of awardees in order for projects to minimize their overhead cost.

So, this year, we awarded 74 new WIPA agreements.

These are cooperative agreements, which means we have the agency has a little more oversight of them than a normal grant would be. The new awardees, they began service July 1 of this year. So they've been up for almost a couple of weeks now.

I will say some of them are brand new. So they are not accepting referrals to their agency yet. But we have reached out and some of the older WIPAs are taking their referrals. So everything is running smoothly.

We have had — we actually have one this afternoon. We've been having a series of startup calls with them to get everyone onboard with everything. A list of the new awardees should be up on your Ticket to Work website within the week.

And also, I also wanted to remind everybody that our training and technical assistance contract for WIPA, which is Virginia Commonwealth University, offers benefits counseling certification. And that is also open to VR agencies for free through the agency. So if anybody is interested, that is on VCU Web site.

And that is all I have. Adelle, you can open it up for questions.

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**Adelle Barr:** Thanks, Cara. (Catherine), if you can help us with opening up for questions.

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**Operator:** Thank you. Once again, if you'd like to ask a question, please press star one on your telephone keypad.

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**Adelle Barr:** And as a reminder, the questions are specific to what Cara just spoke to.

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**Operator:** Now we will take the first question from (David Leon) at Richmond. Please go ahead.

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**David Leon:** Hi. Just a quick question. First off, thanks for that update. In Virginia, we've been really promoting the Introductory Web Course for all of our counselors. And when I last looked, there weren't more dates. Are they going to be adding dates for the upcoming year for the Introductory Web Course?

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**Cara Caplan:** Hi, David. Yes. They will. That is just — it's not even a snafu per se. We just are in the process of updating the past quarter for them. So that should be on their Web site shortly.

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**David Leon:** Okay. Yes. Thank you. And if I could just say to others on the call, for those counselors who we've got to take it, there are several offices in our state that are now going to make that mandatory for all new counselors. Because for a VR counselor, it's not a subject really covered in most master's programs.

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**Cara Caplan:** Right.

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**David Leon:** And even just that level of knowledge to be able to triage a case and make sure to get it to the right person has been invaluable. So thank you very much for that.

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**Cara Caplan:** Yes. That's great advice, (David). I agree with you.

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**Operator:** We'll now take the next question from (Sheila Pierce). Please go ahead.

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**Sheila Pierce:** How long do you think is going to take before the new agency that are up and running and ready to start receiving on referrals, the new agencies that receive cooperative agreements this year?

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**Cara Caplan:** Yes. I think it could take them up to a month. You need to remember, some of them have to hire staff, and go through suitability, and that type of stuff. But it's not that those beneficiaries are not going to be served other agencies around them.

Like let's just — I don't know if this is a fact, but let's just say there's a new one in California. One of the other California WIPAs has agreed to take their referrals in the meantime. So we are taking all referrals at this time.

Does that answer your question?

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**Operator:** It appears there are no further questions ...

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**Adelle Barr:** (Catherine), did you say there's no further questions?

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**Operator:** That is correct. There's no further question at this time.

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**Cara Caplan:** Okay. And if anybody does have any questions for WIPA at all, you can send them to [wipa@ssa.gov](mailto:wipa@ssa.gov) and we will answer your questions.

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**Adelle Barr:** Thanks Cara. Could you just repeat the new email address one more time?

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**Cara Caplan:** Yes. No problem. It's wipa — W-I-P-A — @ssa.gov.

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**Adelle Barr:** Thank you.

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**Cara Caplan:** My pleasure.

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**Adelle Barr:** Okay. And then we'll turn the rest to Patrice.

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**Patrice McLean:** Thanks, Cara.

Good afternoon, everyone. This is Patrice McLean. And I'm here with the brief announcement about the Benefits Planning Query pilot.

Many of you are familiar with the BPQY or Benefits Planning Query pilot that we've been running for quite some time. After more than six successful years of producing and distributing BPQYs in the BPQY pilot, we are seeking to end the pilot effective this Friday, July 16, 2021.

Many of you may remember that we implemented this initiative as a proof of concept in 2015. And we converted it to a pilot after we successfully proved that we could securely transmit BPQYs to a select number of service providers.

Over the past six years in this pilot, we provided more than 65,000 BPQYs to vocation and rehabilitation offices. Some WIPA projects that Cara just mentioned, (tabs) offices, and

also Employment Networks. Through the pilot, we were able to prove and provide BPQYs securely, timely, and at no charge to employment support providers.

We conducted an evaluation of the pilot as well and that is now complete. We identified a positive impact on beneficiary earnings associated with the timely distribution of the BPQY. And we shared that information with our executives.

We also identified recommendations for improving the BPQY and the BPQY process. And we were able to do that in large part with the contributions of organizations such as VRs and ENs that participated and provided feedback on what we could do to improve the BPQY. But we still continue to work on some of those improvements, but we were able to gather the information that we needed.

As you're aware, disseminating BPQY was not a core function of the Office of Employment Support, or rebranded the Ticket Program and the VR Cost Reimbursement, among other things.

And since we can only distribute BPQY to a small population of employment support providers due to our limited staffing resources, and we're not yet able to distribute BPQYs to all of our employment support providers, we're discontinuing the pilot and directing our pilot participants to obtain BPQYs through normal procedures.

We will not process any requests that we receive after July 16. But we will process and refund requests that we receive up and through this Friday, July 16.

We understand that ending the pilot impacted daily business practices. And we want to make as much information available to you as possible. There are a few other ways to obtain the BPQY.

We like to remind you that the Red Book is available with information as to how to obtain a BPQY. And it also has — it is a guide to work incentives. So if you need information about how to request a BPQY, or for work incentives in general, please go to [ssa.gov/redbook](https://ssa.gov/redbook). Again, that's [ssa.gov/redbook](https://ssa.gov/redbook). We recommend reviewing the Red Book for this information.

Social Security do normal procedures outside of the pilot, provides BPQYs the beneficiaries, their representatives, and their authorized representatives upon request. You can request the BPQY — that contact beneficiaries can request the BPQY by contacting their local Social Security Office or by calling our 800-number, which is 1-800-772-1213. Again, to request the BPQY, you can call the Social Security toll-free number at 1-800-772-1213.



People who are deaf or hard of hearing may call our TTY TDD number, which is 1-800-325-0778. Again, 1-800-325-0778.

An employment support provider, or someone other than the beneficiaries who wishes to receive the BPQY, must submit their 3288 Form that has been signed by the beneficiary. That form, as you know, will authorize release of Social Security records. Again, since we removed and announced the removal of earnings information from the BPQYs, we only need one 3288 as opposed to the past when we received two 3288s.

We also want to encourage you to encourage beneficiaries to work with them to create a MySSA account. The MySSA account will have earnings that that beneficiary was able to see. And it gives them their online statement, which should give them some of the information which you would have found on the BPQY.

Please encourage your clients to register to MySSA account at [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount). Again, [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount). We hope that you find this information helpful. And as we end the call, we want you to know that we're continuing to work towards solutions to improve the BPQY and the BPQY process.

For those of you who have been cooperating and participating in this pilot, we cannot emphasize our gratitude enough. And we would not have been able to complete this project without organizations like yours. Thank you so much for working with us to complete this initiative.

If anyone has any questions or concerns, please contact [ordes.bpqy.poc](mailto:ordes.bpqy.poc) — as in proof of concept — [@ssa.gov](mailto:@ssa.gov). Again, that's [ordes.bpqy.poc](mailto:ordes.bpqy.poc) — as in proof of concept — [@ssa.gov](mailto:@ssa.gov).

Thank you so much. And at this time, I will turn over to Shada Roper for more announcements.

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**Shada Roper:** Good afternoon, everyone. It's already July. Wow, so we're plugging through this year. I'm here to report to on the six year record retention. For those of you who are questioning what documents need to be retained, first and foremost, we'd like to remind you, first, adhere to whatever scheduling that your agency calls for first, and then RSA.

So if by chance, you have to rid yourselves of those records prior to the sixth year, we say that you're going on chance because that's your agency's rule, and you have to follow your agency first, and RSA.

But we're giving you six years after we pay the case that you need to keep the records. It's just as the PVR and we say it in our notices. Especially when you have those notices for transitional work, where we say you were out of VR for a year, how did the VR help? After this year, we haven't seen any payment. And then we send you that transitional work record.

We are looking for the case notes. We're looking for the IEPs or the written rehab plans or the IWPs. We're looking for any receipts on the case. We're pretty much looking for all the case documents, so you're treating it like it was prepayment validation review or PVR. You need to retain those documents.

A few years ago, we were just under audit. And VRs were — the documents were destroyed following your agency's destroyed policy, which we understand. That's why this is our recommendation and a suggestion for you. But the documents were destroyed. And we had to recoup a lot of money from VRs.

So this is also for your benefit and your protection. If there is a way to retain those records, please do so once we've paid you. We're saying it's six years after we paid you, just to be on the safe side.

So we know it's a long time. But we have to give you some kind of guidance. And six years, we actually got that from our general records schedule. And that's where we came up with amount of years, six years.

So if there are no questions, that's pretty much all I have. Katie?

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**Katie Striebinger:** Thanks, Shada. And Shada will stick around for questions at the end. And for my section as well, if someone has questions after I talk, we will take questions at the end.

I'm here to talk about a couple of items. But first, being the backlog status. We currently have 5,500, roughly, cases pending. We are and we do continue to work in a first-in, first-out processing status. And we are working April 2021 claims.

So, if you haven't seen your claims being worked yet, please be aware of where we are regarding to claims overall. We don't work based on a specific order. And we do it based on when the claim was received.

And if we do require other information from you, which Raquel will speak about, about diaries, you got to keep a watch for that because we will not go back and reach out to you

for information. If we have diaried it because we need your information, your case will sit there until you update it.

We did get a question about how long information is stored in the portal. The portal ties directly to our record keeping system called (iTOPSS) where we process all of your VR claims. So all of the information in the portal is — goes back to the beginning of VR payment. So any payment you've ever had, any payment you've ever requested from Social Security is available in the portal.

The same thing with your client list, you can go back to the beginning. So it goes all the way back to the beginning of SSA's records.

If you are looking for a particular record, and you don't see it in the portal, if that's the reason that question came up, please do let us know if there are some specific issues you are encountering. But you should be able to see the entire history in the Ticket portal.

And then the final question has come up a few times, electronic signatures. We do accept electronic signatures especially since what happened in the past year. But it must be an electronic signature. We will not accept if it's just typed. It has to be clear that it was a signature and endorsed by the individual.

That is all I have on those three items. I will hand it over to Raquel. And I will, like I said, be online at the end if there are any questions about the items we spoke up. Raquel?

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**Raquel Donaldson:** Thanks, Katie. Good afternoon, everyone. I just have a few things to go over with you.

First is diary that Katie was just mentioning. We will continue to place all the diary on the extended hold until further notice. We know a lot of you, like us, we are not working in the office or not — unable to get to the office to retrieve documentation that's requested. So just know that we completely understand that.

However, if you do receive a 650 Denial without hearing from me first, please e-mail me at the VR Helpdesk. I'm trying to understand what happened. Unfortunately, we're noticing the system error where it will, for whatever reason — I'm sorry. I think I might be cutting out. I'm trying to get it better. For whatever reason, yes, we're getting system errors, and then will deny the Claim 650 without us knowing about it.

Also, there may be instances when additional documentation is requested from the VRs. And we know this is tedious for you guys to try to retrieve this information. However,

sometimes you guys get it back to us and the claim turns out to be denied.

I just wanted to basically go through a couple of steps that explains why this may happen. For one, we have a certain process that we do when we're processing the claim. When we get to a certain part, if the claim is placed in diary for whatever reason, it's not going to tell us or give us a red flag as to whether or not the claim is going to be paid or denied.

So you may go through the process. You may receive a diary of requesting additional information. You may send it back to us. And then it turns out that it ends up being a 610 statement to the trust fund.

Or it may be a situation where you go through and you find all this information only to realize that you don't have the signed IPE. Even with that, that's not something that you're going to be aware of or we're going to be aware of, but it's going to turn out to be a 650 Denial.

Again, this is done after the fact, after you've gone through, you've requested information, you had to go through storage sometimes. But again, we're not aware that it's going to be a denial until this information comes back or you report to us that you're unable to find this information. It doesn't happen often but it will happen.

Also, when a claim gets placed in quality assurance. So the technician has worked the claim. You may have submitted documentation. Then you have a senior program analyst go through and review that claim for quality assurance and find an error made. It may end up, in that situation, to be denied as well.

Again, it doesn't happen often. But if you find that happened, if it happens to you, you want to know, just feel free to e-mail me at the VR Helpdesk and I'll be more than happy to explain what the issue was from the beginning. And we will go from there. That's all I have on diary.

For staff update, if you or a staff member have access to the portal, and you know that you may be retiring, or going on to leave the agency, or that other person is leaving the agency, if you could just reach out to the VR Helpdesk to let us know so that we can get that access removed from the portal.

You can just give the last date the person is working or retiring or leaving. And then we'll make a note of it and be sure to remove that person's access from the portal. Otherwise, they still remain to have access and we're not aware that they no longer are working there.

For the VR directory, we'll be updating the state VR directory. Usually, I will send you — the information to the regional coordinator. And then they'll send out the current version of the directory.

If you have any updates or corrections, new staff, people again who have retired, you could just make those corrections and send it back to your regional coordinator prior to July 30. That would be great.

Last on the agenda is the non-pay status codes. So basically, I just want to let you guys know that there are only two codes -- N01 and N04 that we still will pay for cost reimbursements. And that's 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. So any type of other N, N07, N20s, all of those are considered terminated and you will not get paid for cost reimbursement for those.

That's all I have. Operator, if you want to go ahead and open up the line for Q&A, I'd appreciate it. I know my line was breaking up. I apologize for that. But if you have any questions or anything you need me to repeat, let me know.

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**Operator:** Thank you. Once again, to ask a question, please press star one.

We'll now take the first question from (Eugenia Cox). Please go ahead.

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**Eugenia Cox:** Hello. I've got a couple of questions. Can you hear me okay?

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**Raquel Donaldson:** Yes.

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**Eugenia Cox:** Okay. That wasn't one of the questions, by the way. On the supplemental claims that are submitted, those are taken first come, first served, but they're given a date of when the original claim was paid. How are those processed, Raquel?

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**Raquel Donaldson:** Still first in, first out. So if you send one today, then it would process when we're processing the July 2021 claims.

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**Eugenia Cox:** Okay. Yes. It just shows, when we submitted, as the original claim date. So trying to figure out a way to figure out when we actually submitted them.

And my question with regards to the documentation, the six-year retention, when I was talking about the information in the portal, I was — I know the information about payment is there. But the information that we faxed to you in the diary, the PVRs, the justifications, all those things, are those retained as well? Or do we need to physically keep the hard copies and all of that?

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**Shada Roper:** Hi. As long — this is Shada. As long as you have some kind of copy of the information with the signature, a copy of the signature from the client, then that's fine. We just need something later on.

We also are looking for those receipts with authorization. So you're treating it like it's a PVR, like you would have sent in all the information for PVR weekly. You've got the message that you're on prepayment validation review. Just like the C3 notices where we send you about transitional work, we're just asking that you have copies of all of those documents.

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**(Eugenia Cox):** Okay. Well actually my question is, is we're sending those to you. Does that -- is that retained in the portal?

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**Shada Roper:** We have the copy.

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**(Eugenia Cox):** You have the copy? So we need to keep a copy as well? Is that correct?

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**Shada Roper:** For those types, I need to check in to that. Because we do use those as our records. And we do — we are able to print them out. So you should be okay. The reason why we're saying copy still is because you don't always come up on prepayment validation review.

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**Eugenia Cox:** Okay. Yes.

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**Shada Roper:** So then we don't know — or you don't always have a C3 notice for

transitional work, or what have you. So later if we're under audit, we pull that case because you didn't have transitional work or because it wasn't your prepayment validation review, then you don't know, and we don't know. That's not how the audit is like. Audits didn't necessarily pick prepayment validation review cases.

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**Eugenia Cox:** Yes. Yes.

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**Shada Roper:** So that's why ...

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**Eugenia Cox:** And the statements that are mailed — the statements that are mailed, are those considered documentation we have to keep as well?

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**Shada Roper:** The statement, as in your payment? The payment that we sent?

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**(Eugenia Cox):** Yes.

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**Shada Roper:** The notices?

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**Eugenia Cox:** Yes.

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**Shada Roper:** That's fine as well. But we're mostly interested in your documentation to say why we paid you. So the notices, they're fine. But it's mostly that the receipt, the IEP, the case notes, those kinds of things. And we never know what's going to come up in an audit, so we don't know if it's going to be your PVR that comes up in an audit, or is that just a random case. That's why we're asking you to keep it.

If you can't because of your agency rules, then we also respect that. But we have to give you some kind of heads up to let you know to try to keep as much documentation as possible.

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**Eugenia Cox:** Okay. Okay. Thank you.

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**Shada Roper:** Thank you.

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**Operator:** We'll now take the next question from (Eric Schmidt). Please go ahead.

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**Eric Schmidt:** Hey, can you hear me okay?

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**Raquel Donaldson:** Hi, (Eric). Yes.

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**Eric Schmidt:** Hi. I just — I'd like to chime in on the SVES question but it's just didn't recognize my code. I just wanted to clarify, when the person who was on the call indicated that we need to request more information from SSA on those instances where it just does not -- like does not produce the result. It gives us a — just allowed under the individual's own number but then it does not provide us that third party SSN for us to then resubmit a request.

Right now, we've been asking, and the helpdesk has been very politely helping us on those cases. But is there someone or somewhere we're supposed to really be sending these requests, for instances, on cases that are just unable to be found in the SVES? I just want to make sure we're not burying the helpdesk if that's not the appropriate venue.

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**Raquel Donaldson:** (Eric), I'm actually going to reach out to (Laura) to ask that. I'm not sure if she has access to that information. She may need — I'm not sure if it's your regional that you should be contacting. Of course, when you submit to the VR Helpdesk, I actually don't mind getting the information to you.

But I'll just confirm whether or not you all should be reaching out to your regional coordinator for SVES or just me at the helpdesk.

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**Eric Schmidt:** Sure. Okay. That sounds ...

**Eric Schmidt:** All right. I appreciate that. Thank you.

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**Raquel Donaldson:** You're welcome. We'll now take the next question from (Kyle Beeson). Please go ahead.

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**Kyle Beeson:** Hello. Can you hear me?

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**Raquel Donaldson:** Hi, (Kyle). Yes.

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**Kyle Beeson:** Hey, Raquel. I had a question about digital signatures. I know you said you guys accept digital signatures. Will you accept a digital certificate that would be like, for instance, on a PDF form?

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**Raquel Donaldson:** Katie, are you still there?

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**Katie Striebinger:** Yes. Sorry about that. Yes. That would be acceptable. We use those internally. As long as it's ...

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**Kyle Beeson:** Okay.

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**Katie Striebinger:** A digital signature, right? The PDF.

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**Kyle Beeson:** Okay. And then just for clarification, you wouldn't accept an emailed confirmation saved just like a case note from a consumer for an IPE?

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**Katie Striebinger:** At this point, that doesn't really meet any of the definitions of a digital signature, right? Because they didn't — such as the email affirmation.

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**(Kyle Beeson):** Yes. Yes.

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**Katie Striebinger:** You know, that have their ...

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**(Kyle Beeson):** Okay.

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**Katie Striebinger:** It doesn't meet the criteria that we would follow. Is it — are you having

trouble getting a digital signature in those instances? Or you're just trying to find a way to use something you already have?

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**Kyle Beeson:** During — it was something that was brought up last year during COVID when it was in full effect. So some counselors were having trouble getting signatures, though — I think that's when it came up. So I figured that — if that was something that you guys would still honor.

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**Katie Striebinger:** I can certainly go back and check. But it's definitely not on anything that I've seen as acceptable. But I can go ask and get back to you.

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**Kyle Beeson:** All right. Thank you.

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**Operator:** We'll now take the next question from (Paulette Knarr). Please go ahead.

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**Paulette Knarr:** Hello. Can you hear me?

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**Raquel Donaldson:** Yes.

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**Paulette Knarr:** Okay. I didn't know if I was off mute. My question is pretty simple. First, I just want to throw out there, if any state has a solution to this whole signature issue, I mean, it's easy for me to print out — we used a ware for me to print out just about all of the documentation that I can, except for the IPE. They're in there, but of course, they don't have the signatures.

So what I've had to do is contact all of the local offices and have them send the IPEs to me, scan them and send them to me. I don't know what — sorry, my dog. I don't know what the state is going to do about having signatures always in our system because that would be every single IPE that we do. And we won't know that you are going to ask us for that information until you do. So I don't know if that's really feasible.

But anyway, one of my questions was, I was actually going through my claims, and I have a lot of pending ones. I was able to find them either in payments made, or I found them in pending payments. But I have a lot of claims that are in diary that I don't have a paper,

either PVR request or C3 request. And I was going to send an e-mail to the helpdesk for the (last year).

Should I consider any of those as being something that is either C3 or PVR? I looked in there and I'm not really sure that I could tell from the diary which one was which. So if someone could answer the question, if I don't have a paper request, should I consider anything in diary that's asking this for information? And if so, how can I tell if it's whether or not it's a C3 or PVR? Thank you.

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**Raquel Donaldson:** Hi. This is Raquel. The diary — normally, the VR is able to pull up the diary. The notes in the diary, sometimes you're not able to see what type of notification or what type of documentation we're waiting for. But if you have questions in regards to that, if you're not able to see what type of documentation that is being — that we're requesting, then go ahead and email the VR Helpdesk, and I will go through and let you know what's needed.

Again, sometimes, it may be an issue of it could be something internal for Social Security that you don't even need to take action on. You may not know that though. So you can send a list to the VR Helpdesk and I will go through it and let you know what each one is for.

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**Paulette Knarr:** Okay. Yes. Because I started the list so you're going to get — the helpdesk is going to get a few emails. But I'm doing them separately so that I can kind of keep track of everything.

I will be retiring, by the way. And I will send an email that gives the date. So that's why I was in our tracker to clean (out) anything so that I wouldn't leave my predecessor with it. So you're going to get several e-mails from me so that I can try to leave everything as neat as possible.

And I just want to say, it was a pleasure working with everyone. And I'm sure that I'm leaving my (docs) into good hands. And this is going to be like my last meeting. So thank you, everyone. Thanks, Raquel.

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**Raquel Donaldson:** Thank you.

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**Operator:** We'll now take the next question from (Eugenia Cox). Please go ahead.

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**Eugenia Cox:** Can you hear me? This is (Eugenia).

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**Raquel Donaldson:** Yes.

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**Eugenia Cox:** Don't worry. I'm not retiring so you're going to have me for a long time. So quick question on the electronic signatures. You answered the question for right now. But how long is it going to be that you're going to accept electronic signatures? Because in a lot of cases, when we have individuals that have a hard time leaving their homes, and things like that, we're implementing the electronic signature. But is that going to be a long-term acceptance of electronic signature or just as temporary?

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**Katie Striebinger:** (Eugenia), this is Katie. I don't have a good answer for that one right now.

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**Eugenia Cox:** Okay.

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**Katie Striebinger:** I — you know, a lot has changed over the past year and I think we've tried to react as quickly as possible, giving everyone as much leeway as possible, and being as understanding as possible with the limitations that we have. If we hear something like it's about to change, we'll keep you as informed as we can, and make as much consideration for how this will affect everyone, so.

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**Eugenia Cox:** Yes. And a lot of the states are allowing people now to work from home part-time because it is saving the states a lot of money. So those electronic signatures might come into play more often. So that's the only reason I'm asking. It's because the states are finding that it's economical better to have individuals work from home either part-time or full-time.

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**Katie Striebinger:** The best I can say is, you know, as soon as we hear that there is even a shift in their thinking about that, we'll let you know.

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**Eugenia Cox:** Okay.

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**Katie Striebinger:** But at this point, things are going to be the same as far as I understand it.

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**(Eugenia Cox):** Okay. Thank you.

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**Operator:** There are no further questions at this time.

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**Raquel Donaldson:** All right. Thank you. If there's no further questions, if you do have a question that you happen to think of after the call, please feel free to email the VR Helpdesk. And we'll get that answered as soon as possible for you.

Just one last reminder, I can't believe I'm about to say this, we're actually down to our last quarterly call, Tuesday, October 19 at 1:00 pm Eastern Standard Time. I just want to thank everyone for taking the time out to be on the call. And have a great afternoon.

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**Operator:** That concludes today's call. Thank you for your participation. You may now disconnect.