

## Welcome and SSA Updates

### Rob Pfaff (SSA)

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

#### **Social Security leadership changes**

On Friday, July 9, President Biden announced Kilolo Kijakazi as the Acting Commissioner of Social Security, replacing Andrew Saul. Stephen Evangelista is now the Acting Deputy Commissioner of the Office of Retirement and Disability Policy (ORDP) which oversees the Office of Research, Demonstration, and Employment Support (ORDES) the component responsible for the Ticket to Work program.

#### **Ticket to Work program audit**

The Government Accountability Office (GAO) recently concluded an audit of the Ticket to Work Program. On July 29, Rob attended the GAO audit exit conference to review the findings. Social Security will share the full report when it becomes publicly available.

#### **Employment Summit**

Social Security is finalizing plans to hold a virtual Employment Summit in November. 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 Employment Networks (ENs), state Vocational Rehabilitation (VR) agencies, other stakeholders, and employers.

#### **Email campaign**

Social Security's Office of Employment Supports (OES) is working with the Office of Communications to conduct an email campaign to reach Ticket-eligible beneficiaries. The campaign will inform Ticketholders about the Ticket Program and connect them to the beneficiary Call Center and website. The messaging will inform Ticketholders that they may be contacted by ENs. This may assist ENs participating in the market business process.

## Benefits Planning Query (BPQY) update

### Patrice McLean (SSA)

The BPQY Pilot project ended July 16, 2021. Social Security implemented this initiative as a Proof of Concept (POC) in 2015 and converted it to a Pilot after proving that BPQYs could be securely transmitted to a select number of service providers. Through this Pilot,

we provided more than 65,000 BPQYs to ENs, Work Incentives Planning and Assistance (WIPA) projects, Protection and Advocacy for Beneficiaries of Social Security (PABSS) offices, and Vocational Rehabilitation (VR) agencies. As a result, employment support providers were able to obtain BPQYs securely, timely and free.

OES has completed the evaluation of the Pilot and has identified a positive impact on beneficiary earnings associated with the timely distribution of the BPQY. OES shared these results with SSA executives and has identified recommendations for improving the BPQY and the BPQY process.

BPQY dissemination is not a core function of the Ticket to Work Program Office. Since SSA could only distribute BPQYs to a small population of employment support providers due to diminished staffing resources and are unable to expand distribution to all, SSA discontinued the Pilot and are directing Pilot participants to obtain BPQYs through normal procedures.

There are several other ways to obtain a BPQY:

- The [Work Incentives](#) website provides links to other helpful resources, such as the [Red Book](#), a guide to work incentives.
- The [Red Book](#) serves as a general reference source about the employment-related provisions of the Social Security Disability Insurance and the Supplemental Security Income Programs for educators, advocates, rehabilitation professionals, and counselors who serve people with disabilities. Specifically, the BPQY section of the Red Book includes information on how to request BPQYs, who to contact (local field office, toll free number), forms needed, etc.

Social Security provides BPQYs to beneficiaries, their representative payees and their authorized representatives of record upon request. Beneficiaries can request a BPQY by contacting their local Social Security office or by calling Social Security's toll free number, **1-800-772-1213** between 7 a. m. and 7 p. m., Monday through Friday. People who are deaf or hard-of-hearing may call the toll-free TTY/TDD number, **1-800-325-0778**, between 7 a.m. and 7 p.m. Monday through Friday.

If someone other than the beneficiary wishes to receive a BPQY, they must submit an SSA-3288 form (Consent for Release of Information) that has been signed by the beneficiary. This will authorize the release of Social Security records. The release must contain the beneficiary's Social Security number or the claim number. Copies of the SSA-3288 are available at <https://www.ssa.gov/forms/ssa-3288.pdf>.

Beneficiaries and employment support providers can use the Social Security locator (<https://www.socialsecurity.gov/locator>) to find their local field office, and follow directions in the Red Book to submit the required authorization form (if applicable) to obtain a BPQY. SSA field offices now accept BPQY requests via mail, fax, or desktop fax.

Beneficiaries can access their earnings information by creating a [mySSA](https://www.ssa.gov/myaccount/) account. Once registered for a mySSA account, beneficiaries have access to their Online Statement, which provides immediate access to their earnings records, and access to view, print and save their Social Security Statement. Please encourage your clients to register for a mySSA account at <https://www.ssa.gov/myaccount/>.

If you have questions or concerns, please contact [ORDES.BPQY.POC@ssa.gov](mailto:ORDES.BPQY.POC@ssa.gov).

## EN updates and reminders

### Cara Caplan (SSA)

#### Work Incentives Planning and Assistance (WIPA) Cooperative Agreements

On July 1, 2021, Social Security awarded Work Incentives Planning and Assistance (WIPA) cooperative agreements to 74 organizations. For Ticketholders being referred to WIPA, please note that there are new WIPA projects and existing projects who have changed their service areas. Social Security is working hard to ensure all beneficiaries are served while new WIPA projects become fully operational. Find more information and a list of current WIPA projects [here](#).

#### EN Enhancement

Social Security is currently reviewing a list of ENs identified as being in violation of Part 3, Section 9 of the Ticket Program Agreement (TPA). ENs must meet the following performance measures:

1. Take at least one Ticket assignment within the first calendar year of the TPA award and maintain at least three active Ticket assignments during each calendar year thereafter.
2. Receive at least one Ticket payment during the second calendar year following TPA award and three payments during each calendar year thereafter.

Additionally, persons working under a TPA, including Administrative EN affiliates, must have a positive suitability determination to work in the Ticket Program.

ENs that fail to comply with these minimum standards are subject to sanctions and/or TPA termination. Social Security has terminated 81 ENs for failing to meet these standards.

### **Upcoming call for Administrative ENs (AEN)**

A call will be held for approved AENs on Tuesday, September 14 at 1:00 p.m. to discuss and answer questions about the requirements and expectations related to operating an AEN.

## **Outreach update**

### **Jayne Pendergraft (TPM)**

#### **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](mailto:Stories@choosework.ssa.gov).

#### **Fact Sheets**

Ticket to Work fact sheets provide useful information about the program and other Work Incentives. The latest fact sheet, [What is Social Security's Ticket to Work Program?](#), contains important information about how the Ticket Program can help the people served by ENs. Share it with Ticketholders who receive Social Security disability benefits (SSDI and/or SSI) to answer their questions about the Ticket Program.

#### **Work Incentive Seminar Event (WISE) Webinar**

These webinars are typically held on the 4<sup>th</sup> Wednesday of each month from 3:00 - 4:30 p.m. ET and are a great way to share information about the Ticket Program. Register at [choosework.ssa.gov/wise](https://choosework.ssa.gov/wise).

View previous webinars at WISE On Demand: <https://choosework.ssa.gov/webinars-tutorials/webinar-archives/index.html>

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### 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, November 16, 2021, at 1 p.m. ET.