

Keitra Hill (Moderator): Good afternoon, everyone. Thank you again for joining today's quarterly All VR Call. I will be the moderator for today's call. We will get started now. First, I'll start with the agenda. I will go over a few housekeeping reminders. Then we'll have our Social Security welcome by Robert Pfaff and a welcome to Renee Clarke. Then I will go over the VR updates and reminders. And then we'll have an update on the cost formula from Raquel Donaldson, and then we'll go into our question-and-answer session.

So, here we have our housekeeping reminders. Please feel free to ask any questions in the Microsoft Teams chat section. If you are joining via phone and you wish to ask a question, we ask that you raise your hand utilizing star 5, and you'll be unmuted by myself, the facilitator, and then you'll press star 6 to unmute yourself. Please ask one question each time you are called upon by the facilitator. Additional questions or comments can be sent to vr.helpdesk@ssa.gov. Those questions that are not answered during this live event can be forwarded to that email address, and we will respond as soon as possible.

There is closed captioning available for participants who are joining via Microsoft Teams. That link has been placed into the chat. The Microsoft Teams application is utilizing a separate closed caption link provided. To turn on the captions option in Teams, go to the three ellipses at the top of the Microsoft Teams window and click "More actions." Next, scroll down to the list to turn on live captions. When using the link option, paste the link into your browser, and it will open in a separate window for you to view the closed captions. Thank you in advance for your participation in today's call.

So, I will turn it over to Rob Pfaff to give Social Security welcome, and a welcome to Renee Clarke.

Robert Pfaff: Good morning and/or afternoon, everyone. Thanks for joining us today for this quarterly VR call. We appreciate your participation. We have a couple of updates that we would like to share with you in regard to the management team.

First of all, Renee Clarke is the new manager for the VR team. Renee has a PhD in social psychology and has been a Social Insurance Specialist in ORDES' Office of Employment Support since 2014. She also has previously served as the Contracting Officer's Representative for the Ticket Program Manager contract previously and has conducted a wide array of quality-assurance initiatives on Employment Networks as well. She brings outstanding written and oral communication skills into the position. So, I just wanted to introduce her and welcome her into the position. Katie Striebinger, who has served previously as the VR team manager, is transitioning into a Senior Adviser technical adviser role, where she will largely handle very technical projects throughout the office. And a lot of these deal with payments. They deal with budget-related items and so forth. And we thank Katie for her time as the VR Manager. We expect this transition to occur smoothly and seamlessly as we move forward.

The other personnel announcements that we wanted to make are that Melanie Webb, who has most recently served as the Contracting Officer's Representative for the TPM contract is now

the manager of the Contracts and Grants team. So, Melanie will manage the WIPA, PABSS, and TPM contracts. Cara Caplan transitioned to Deputy Director in the Office of Research and Demonstration, where she will serve with Joy Cobb, and will help provide expertise and guidance on research projects that are related to the Ticket to Work area. So, we wish Cara the best, as well. We welcome Melanie. And, again, we anticipate a smooth transition there, as well. So, without further ado, at this point, I'll turn it back over to either Keitra or Renee to go forward with the agenda. Thank you, all.

Keitra Hill: Hi. So, now we will move on to a welcome from Renee Clarke.

Renee Clarke: Hi. Good afternoon, everyone. As Rob said, I have been with the Ticket Program for a number of years. I have worked with ENs on that side. So I have been learning a lot. I'm getting up to speed on the VR Cost Reimbursement program, the policies, and procedures. I'm looking forward to continuing to learn and contributing. Thank you all for having me. Keitra?

Keitra Hill: Yep. Thank you, Renee. So, now I will move on to give the VR updates and reminders. The first item that we want to talk about is a virtual training opportunity. SSA will be offering virtual training opportunities to new VR coordinators, who will get an overview of VR policies, learn best practices for submitting a claim, how SSA processes claims, and important reminders. SSA will hold some small training sessions, about 10 individuals or less. If you would like to participate in that, if you are a new VR coordinator, please send that request to vr.helpdesk@ssa.gov, and you will be added to the invitation list and provided information as those classes come up.

Next, we have some payment stats. This shows from fiscal year '21 to year-to-date. As far as receipts in fiscal year '21, we had a little over 21,000, in '22, about 27,000, and then year-to-date we've had 24,440 receipts. As far as payments in those fiscal years, it's about \$195 million in '21, \$237 million in '22, and then year-to-date, \$182,389,534. So, you can see, year over year, it's definitely either increased or -- again, it's year-to-date. Looking at those numbers, that was the end of the year and we're in the middle of the year. So, we're in a good place. And then lastly, for claims processed in fiscal year '21, there were over 24,000, in '22, over 29,000, and then year-to-date, over 25,000.

So, a reminder about reconsiderations. SSA announced back in February 2020 that VR agencies are only allowed to submit one reconsideration for the same VR period if the initial claim was denied due to earnings. That means if your claim was denied with the codes listed below, you should not submit another reconsideration. That's codes 200, 210, 220, 225, 320, 325, and then 620.

A few more reminders. The VRCER file does go out once per quarter. The next file will be going out the first week of August. You can send any general inquiries to vr.helpdesk@ssa.gov. With that, be sure to include your PID, and that's your provider ID, in the subject line or the body of the email so that your organization or agency can quickly be identified, and they can respond back to your inquiry. Lastly, unless you have been given specific direction by SSA, VR agencies should submit all reconsiderations via the Ticket Portal and not via email to the VR Help Desk.

One notification about the Ticket Portal — the payments already made to me. It's come to SSA's attention that some Portal users uncheck the box, the checkbox that says, "include denials." And that's in that "payments already made to me" report or screen. This is currently not working properly, and users are asked to keep the box checked until SSA can fix the issue. So, some of you may have seen this or this has occurred, where you're pulling up the report and it's not quite coming up properly. So, we do, again, ask that you leave that box checked. You can use the filter option in Excel once you download the report to remove denials from that list. If you need help with filtering, please contact the VR Help Desk.

Well, those are the reminders and updates that I had. We'll hear some more updates in reference to the cost formula from Raquel Donaldson. Raquel, you can go ahead.

Raquel Donaldson: Thank you, Keitra. Good afternoon, everyone. I just have two quick updates. I believe Keitra already went over the PID reminder. So, when you're sending any email to the VR Help Desk, please be sure to include your PID, which is also, for those who don't know, it is your DUNS number. But, again, we've changed the verbiage on that one. Also, any other information that you feel is important, the more, definitely the better for any VR Help Desk email you send. And what I mean by that is, include the Social Security Number, the beneficiary's name, the claim number. The more information that you provide pretty much is going to allow the VR analyst to do a quick turnaround with reviewing the information. When you only provide the claim number, it causes the analyst to have to go in. We search by the claim number just to find the Social Security Number and the beneficiary's name.

So, again, if you've already included that information, that helps us and allows us to get back to you much faster than the norm.

For the fiscal year '23 Cost Formula, I believe we are at the finish line. Yay! We just have to get final approval from management, work out a few kinks. We have some awesome, awesome people from a few of the VRs that are assisting in this. It's been amazing. But once everything is complete, hopefully within the next week or two, every VR will receive an email at that time. We will be trying to get together another team meeting like this one. It is highly, highly suggested that once you receive that email invite, that you include anyone on your accounting staff, as well as yourself, on these calls so that anyone that you work with to get the cost formula completed, please, please, please include them for the email and include them on the invite so that should lessen any questions that you may have once you receive instructions from us. So, again, we see the light in the tunnel finally. And hopefully you will hear something else from me within the next week or two. But we thank you so much for your patience on this. It's been a rough road, but, again, we're at the finish line. So, that's all I have for today. I'm going to go ahead and turn it back over to Keitra.

Keitra Hill: Thank you so much, Raquel, for those updates. And I know everybody is excited to hear there is light at the end of the tunnel coming soon.

Well, next we're going to move into our question-and-answer session. So, for asking questions, if you are asking over the phone, again, you want to raise your hand by dialing star 5. You'll be unmuted by me. And then you want to press star 6 to unmute yourself. If you're asking a

question via Teams, you can enter that question into the chat, and you can raise your hand also and we will unmute your mic. So, let's see. Let's start with some questions from the chat. Emani, do you see any questions in the chat? I believe there was one that may have been covered already.

Emani Cain: Yes, Raquel answered that question, so there's no current questions in the chat.

Keitra Hill: Okay. Alright. Do we have any hands raised?

Katherine Jett: Hi, Keitra. This is Katherine. No, we do not have any hands raised. I would just like to remind everyone — if you want to raise your hand, click the icon up top, the raised-hand icon, and we will unmute you and give you access to your audio and video. We do have a raised hand, Keitra. We have Eugenia Cox. Eugenia, you are unmuted. Unmute yourself and ask your question.

Eugenia Cox: I just wanted to ask — on the diaries, when we convert them to Excel, some of the diary information is not transferring from the actual diary language onto the Excel spreadsheet. For example, PVR is showing up on the diary, but it's not showing up on the spreadsheet. Are they working on that?

Katherine Jett: Alexis, are you on the line?

Alexis Thomas: Hi, Eugenia. This is Alexis. I believe I worked with you, looking at that, and I can check with you again, but I don't believe that the information you're referring to was ever on that report. So, if it wasn't on the report prior to our release in June, it won't be on the report now.

Eugenia Cox: Yeah. It's always been. So, if there was a justification requested in the diary, it always transferred over onto the Excel spreadsheet.

Alexis Thomas: If anybody has examples of that, that would be ideal. Then I could bring it to our team to show them that this was there pre-June 24th, but post-June 24th, it is not there.

Eugenia Cox: Yeah, I'll send you something so you can see.

Alexis Thomas: Okay. I appreciate it. That would be very helpful for us to be able to troubleshoot this.

Eugenia Cox: Yeah, and I also wanted to thank the Help Desk. They have been very quick in responding to any inquiries that I've sent in. Even when I have questions about the questions or the responses, they've been really good about responding fairly quickly. I just wanted to thank them for that.

Katherine Jett: Thank you, Eugenia. At this time, we would like to let you know again, if you would like to ask a question, please click the raised-hand icon up top and you'll be unmuted. Emani, do we have any questions in the chat?

Emani Cain: Yes, we have a couple of new questions. This one is from Ann Lynn.

Ann Lynn: Can you explain how to work through the process where we receive an initial denial due to earnings being too low? It appears that the clients are being approved to use their Blind Work Expenses. How do we know when we should re-submit? If I see earnings increasing, wouldn't I want to try to submit the claim again? But then I have no way of knowing if work expenses are being deducted.

Katherine Jett: Thank you. SSA?

Raquel Donaldson: Hi, Ann Lynn. It's Raquel. I'm not sure what you mean by Blind Work Expenses. We are going by either the W-2 or the earnings that are submitted to us verified. So, keep in mind that once you receive the initial denial, anytime that you submit your reconsideration, it's never going to be denied as untimely because we're looking at the date that you initially submitted the claim. So, I'm not sure exactly. And you may have to email something to the VR Help Desk just to show an example of what you're talking about in regard to work expenses being deducted. If you would do that, it can be reviewed there. We can follow up with you. That's all I have.

Katherine Jett: Thank you so much. Emani?

Emani Cain: Yes, another question that we have from Susie Paulson.

Susie Paulson: Our VR has recently been moved under our workforce development. They function as EN and VR cost reimbursement. How will this affect us?

Katherine Jett: Raquel?

Raquel Donaldson: Hi, Susie. This is Raquel. It depends on how you are submitting. If it's a cost reimbursement, then you're submitting it under the VR. So, it shouldn't affect you. I'm not sure what VREN you are with or if you're already considered a VREN. It won't affect you at all. It just depends on how your Ticket is assigned. If you're assigning it under an EN, then that's one type of payment. Or if you're assigning it as a VR, then that goes onto cost reimbursement. I'm not sure if I'm answering your question or if there is a follow-up. If so, please put it in the chat for me.

Emani Cain: There was a follow-up, Raquel.

Susie Paulson: Our workforce development is the EN, but VR does cost reimbursement.

Raquel Donaldson: So, again, that means you're submit — Rob, did you want to jump in?

Robert Pfaff: Well, it sounds like the workforce is a separate entity that happens to be an EN and the VR is still operating as the VR. In this scenario, they're combined. And I don't think it has any impact at all. You know, we have multiple workforce agencies throughout the country that serve as ENs. It's just how it's structured within the particular state. I think the question is centered around the fact that there's been a change in that structure. But I don't think it matters to us in terms of the workforce -- If I understand this correctly. I think it's basically two separate

entities working under one umbrella. And the EN, which is the workforce, is still going to be an EN and is still going to submit payments for EN payments, and then the VR will still operate as the VR and submit payments under cost reimbursement. And I don't think that impacts us at all, but that's my interpretation of what the question is, so I just wanted to throw that in there.

Katherine Jett: Thank you, Rob. Are there any more questions in the chat, Emani?

Emani Cain: Yes, we do have a couple more. This one is from ACF.

ACF: Is there any chance that the determination letters can be accessed in the Portal?

Alexis Thomas: This is Alexis. If you're referring to the letters you get with the payment amounts, we cannot have those added to the Portal. Those come from a separate entity.

Katherine Jett: Thank you, Alexis. And I see another question in the chat, Emani.

Emani Cain: Yes, from Eugenia.

Eugenia Cox: Can the diary due dates for justification or PVR be added to the Excel spreadsheet?

Alexis Thomas: This is Alexis again. Eugenia, if you could please send an email with that request, I can put it in as a wish list item, but at this time, we don't have resources to make changes. I can always put it in for a future item.

Katherine Jett: Thank you, Alexis. And we have one more question in the chat. Emani?

Emani Cain: Yes, the last question is from Nina.

Nina: When trying to retrieve an assignment file in the Portal under "check status of files sent to SSA and download results if available," the download column blinks at you and disappears. So, are you trying to chase it in the two seconds that you see it before it disappears? Any solutions?

Alexis Thomas: Hi. This is Alexis again. That is being fixed in August, I believe, except that, currently, if you see on the left-hand side of the screen, once that blink goes away, there is a blue circle with a plus sign in it. Click on that blue circle for that row of your work case, and it will expand the screen and then you can download the information you need. And you'll see the download option.

Katherine Jett: Thank you, Alexis. And do we have any other questions, Emani?

Emani Cain: No. That's all for now.

Katherine Jett: Thank you, Emani. I'd like to remind everyone — if you would like to ask a question, please click the raised-hand icon. We'll give you access to your audio and/or video. And ask a question.

Emani Cain: Hi. This is Emani. We do have another question in the chat, from ACF.

ACF: Is there an alternative method of sending the reimbursement form and wages? Sometimes my faxes are not being transmitted.

Katherine Jett: Okay –

Raquel Donaldson: Hi, Abrina –

Katherine Jett: Go ahead, Raquel.

Raquel Donaldson: Sorry. Hi, Abrina. This is Raquel. I think this is something that we've discussed before, and unfortunately, there's not an alternative because SSA all work from home, so we do not have access to retrieve anything that you may fax directly to the building, like we used to when we would come into the office. So everything has to be uploaded to the Portal via fax. You may want to have a conversation with someone in your IT department because I haven't received any emails from any of the other VR stating that they're having the issues that you're having in regard to transmitting your faxes.

Katherine Jett: Thank you, Raquel. Emani, do we have any other questions in the chat?

Emani Cain: No, ma'am. That's all.

Katherine Jett: Okay.

Emani Cain: Oh, no. No, we have one more -- this is Emani -- from Eugenia.

Eugenia Cox: When you have a cost reimbursement without wages in the comments section and are faxing them, how long do you have to fax them after submission?

Raquel Donaldson: 24 hours, Eugenia. If you upload your claim and you make a comment that — there has to be a comment there that states "earnings to follow," then you have 24 hours to do so.

Katherine Jett: Thank you, Raquel. Emani, go back to you.

Emani Cain: Yes, we have another one from Colleen.

Colleen: I recently learned that a new blank cover sheet must be printed for every single fax, or they won't go through."

Alexis Thomas: Yes, Colleen, that's accurate. Once the fax is received by us, that barcode cover page is a one-time-use page. Until the Portal tells you we've received it, you can keep going again. But once it shows as received, you would have to get a new cover page to fax additional documents on that work case.

Katherine Jett: Thank you, Alexis. Emani, do we have any other questions in the chat?

Emani Cain: Yeah, we have one from Donna.

Donna: I can only fax from the office with a physical fax machine. When I try to fax from home via email, it will no longer work.

Katherine Jett: Okay.

Raquel Donaldson: Hi, Donna. It's Raquel. Is that a question in regard to that, or is it a matter of you needing more time?

Katherine Jett: We'll give access to the audio for Ms. Osborne.

Raquel Donaldson: Oh. I see, Donna. Thank you.

Katherine Jett: Okay. Donna, would you like to expand on that? You have access to your audio if you want to unmute.

Donna Osborne: Oh. Sorry about that. I was chatting.

Katherine Jett: No problem.

Donna Osborne: I just want to know -- We're talking about the fax machines. I have discovered that I can no longer — I used to when we were working at home all the time. I had no problem sending a fax over a secure email connection, but that no longer works for me. I have to physically be in the office and use our physical machine in order to fax anymore. I don't know what the change is or what that was, but that's been an issue that's come up with me. As long as I can come into the office, I'm good.

Katherine Jett: Thank you, Donna.

Alexis Thomas: Donna, this is Alexis. Have you worked with your IT department? We have people that use those faxes, and it works. So, that might be an IT blockage through the fax server that you're using.

Donna Osborne: Okay.

Alexis Thomas: So definitely work with your IT department and see. Way in the past, there were some issues like that at times, but we haven't heard of any of those recently.

Donna Osborne: Okay. I'll see if we can't get that working again because it would be handy.

Katherine Jett: Thank you very much, Donna. We have a question now from Eugenia Cox. Eugenia, you're unmuted, if you'd like to ask your question.

Eugenia Cox: I heard somebody say you can only use the fax once. We have claims that can be like 300 pages for an aid justification or a PVR. And we were told it was okay to re-use that fax cover sheet when we have more than can fit in the fax. Is that not true anymore?

Alexis Thomas: Hi. This is Alexis. I'm not sure when that was noted, but that was not true. Once the fax status page shows you the fax was received for that one particular cover page that you printed, you have to get another one. So, let's say you want to break it up into, you know, 100-page sections. You would need to get three different cover pages.

Eugenia Cox: Oh.

Alexis Thomas: And you can see that status — Unfortunately, I don't have it up in front of me, but if you look in the Ticket Portal User Guide, there would be a section that shows you where to find the fax status.

Eugenia Cox: Yeah, I realize that, but I couldn't find the email that says you can use the fax cover more than once for the same claim. I can forward you that if you want. Because I've been

doing it that way for as long as I can remember. You know, I do write on there "part 2" or whatever, "part 3," and it's accepted it all and they were reviewed.

Alexis Thomas: I mean, I'm glad it was accepted, and it was being reviewed. To our knowledge, you can only use a fax cover page one time, and once it's received, you'd need another one.

Eugenia Cox: So, if I had a 300-page PVR or justification and I want to send 100 pages at a time, I have to do three separate fax cover sheets?

Alexis Thomas: Yes.

Eugenia Cox: Okay. I'm going to forward you the email that says I can re-use the fax cover sheet so you can see.

Alexis Thomas: Okay. Oh, appreciate it. Thank you.

Eugenia Cox: Thanks.

Katherine Jett: Thank you, Eugenia. Okay, do we have anyone else that would like to ask a question? If you'll just raise your hand, we'll unmute you and you can ask. Emani, are there any questions in the chat?

Emani Cain: No questions, just general statements in regard to what you were just talking about.

Katherine Jett: Okay. Thank you. Well, I'll turn it back over to you, Keitra.

Keitra Hill: Thank you, Katherine. So, lastly, our next All VR Call date will be on Tuesday, October 10 at 1:00 p.m. All documentation from today's call, which will be the presentation, as well as the transcripts and so forth, will be made available on Your Ticket to Work website in the next few weeks. And that can be found on the Events archive section of the website. With that, I would like to thank everyone for participating in today's call. And enjoy the rest of your day. Thank you so much.

Katherine Jett: Thank you. Thank you!