**All State Vocational Rehabilitation Call**

**3 – 4:30 p.m. EDT**

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Nate Arnold: Thank you for joining us. We don't have too many things on the agenda so there should be plenty of time for questions and answers. Anything that you feel like you need to know or want to raise at this point, today we should have plenty of time to get to all that stuff.

In terms of updates in Cost Reimbursement we have continued to try to dig out of a hole that I know you guys probably get tired of hearing me tell you about that started last year with the shutdown and the unusually arctic winter we had here in Baltimore and all the missed time that we had, but we are almost dug out of that. We are at a point where through July we've paid out about as much money as we had last money at this time and as you know FY13 was the largest year on record in terms of money amounts paid. I expect us to finish this fiscal year right around that same 135/138 million, assuming the rest of the month goes as projected.

The staff is in the middle of working April payments now so anything that came in during April is pretty much what's being worked. I will tell you that everything that we got by August the 29th, which was the last work day of the month, got input as a receipt and should be reflected in reports that you are receiving this month. There's nothing sitting around that we're not aware of or it's not reflected in those totals. We have about 5,000 claims pending so plenty of work for us to catch up to. We're trying to get to it as fast as we can.
I think with that that's pretty much it for Cost Reimbursement. Des, did you want to say something about some of the Portal related stuff?

Desiree Fitzgerald: Yes, we're expecting someone to come to talk to you in a little more detail about one aspect of this, but I'll go ahead and just give you some general information.
Yesterday our acting deputy commission met with Ed Anthony and others at RSA and we wanted to have a meeting just to alert them to some of the new requirements for accessing the new Ticket Portal. We also gave them an early heads up concerning automating VR payment processes by April of 2016. So the primary focus of yesterday was preparing for the new Portal.
RSA, they are now aware that you are going to need to fulfill some different requirements in order to access the new portal and these things need to be done by January of 2015. We've been mentioning, casually mentioning, I should say, on various calls over the past few months but we're down to about a 90-day time frame so we're ready to go into action to get some things done, but they know about the browser requirements so we're expecting that they will make preparation, will work with the states to make preparation so the users who need certain browsers will have them if you don't already have them.
Also they know that you need to register for the my Social Security account with the extra security and also that you have to have a cell phone through which you can receive a text message with a code for each portal session. And the final major requirement is that you will have to have Federal Suitability clearance in order to use the portal and we weren't aware of this always but we did clarify that you will have to have that clearance just as en's have had to have it but because you are entering SSA's system you'll have to have it as well.
So we basically cannot bring any of the VR agencies into the portal even in the pilot stage until you have these requirements. That's true of all service providers, EN's as well, but the Suitability clearance, we realize that would be something that you may not have been expecting. This may be the first time we're mentioning this. I'm going to have Natalie give you a little more information about that and MAXIMUS will be available with some materials and training and things of that nature to disseminate for us eventually.
But RSA is also going to be communicating information to you all -- well, actually they are going to be communicating to the administrators and the fiscal management for further dissemination and to address some of the needs so there will be information coming from that direction as well. I'll turn it over to Natalie to talk about the Suitability clearance.

Natalie Sendldorfer: There are just a few steps in the Suitability process. And the first step is for the point of contact or designated person that you will select in each VR to fill out a form called the eQuip applicant list. This form requires the names of the applicants requiring Suitability as well as their social security number, their date of birth and their place of birth and the designee will fill out this form and email it to our Suitability office here at SSA
the next step will require the applicants to log into our office of personnel management portal by way of an invite. SSA will send an email to point of contact at each VR, the point of contact will then forward the point of contact invite to each individual who will create a log in and answer the background questions. When they have completed the online questionnaire, the applicant will be directed to print the last page, which is a signature page and sign that, and they are also going to be required to sign a declaration of federal employment and the fair credit page and the last step is for them to have their fingerprints taken. So we will send out fingerprint cards to each of the VR offices and they can take them to either the local police station or other approved sites to get those taken.

So when that is completed the point of contact will gather a packet with the signed forms and the fingerprint cards and mail that to the Office of Suitability here.
After the Suitability office has all of that it will take approximately 15 days for them to make the Suitability decision and mail a letter that states the applicant has clearance and at that point we can get into the portal.
After the clearance is set, Office of Personnel Management will make a final decision which we either agree with or not agree with the original decision and they will be contacted then. So we hope to have this all done by the beginning of December, hopefully, so they can be ready for the Portal to go live the beginning of January.

Nate Arnold: Thank you, Natalie. I think that's pretty much it for the updates. We're going to get ready to take questions here in a minute. I did want to go ahead and address one question we had received through the help desk and it concerns some confusion over the fact that we had told all of you that we are accepting quarterly wage information and yet you occasionally get claims back from us that have been denied because there was monthly evidence the person didn't have SGA in a particular period.

 I just want to make sure you all understand we will accept quarterly estimates as long as there is not in our system or we don't have other evidence of monthly wakes that would put them below SGA in a particular month and thereby mess up the nine months of SGA that you are trying to establish. So what you find in a lot of cases, particularly if it's SSI where the monthly wages get posted pretty quickly if they have predeterminations even though quarterly, whether it be the state unemployment records or the QBER that show three levels of SGA levels you could wind up having a claim that gets denied.
So it's quarterly if we don't have anything else, but if we have some monthly that's lower than that, then that rules the day. And with that, operator, I think we're ready to take questions.

Operator: Thank you.

Nate Arnold: Could we do some of the ones coming in through the webinar? I wanted to mention that we will send out with the meeting notes some brief written information about the actual requirement. One page of it lists the major requirements and we can send that with the meeting notes and we can move this process along quicker. Certainly if you want to go ahead and register for the my SSA account, that's part of the requirements. You can do that and we will be moving quickly to get information disseminated about the security clearance as well. So if you're already using these tools and if you want to join in with the pilot and that kind of thing we can try to get you into a position to do that. But our regular time frame for having everyone ready would be by mid-December. But we can move quicker than that if you want to participate in the pilot or something. Operator, I think we're ready to take questions now.

Operator: Thank you. Ladies and gentlemen, if you'd like to register for a question please press the 1 followed by the 4 on your telephone. You will hear a 3-tone prompt to acknowledge your request. If your question has been answered and you'd like to withdraw from your registration please press the 1 followed by the 3 and you can also ask a question using the chat feature located in the lower left corner of your screen. Hold on a moment for the first question.
We have a question coming from Gina Haupt.

Gina Haupt: I have a couple questions. The first is not related to the Suitability; although I have a ton of questions like that, but I think a ton of us have questions about that so I will let them ask that. But I have not received my July claim processing report. I received my August one but I have not received my July claims processing report yet in the mail so I was hoping I could find out where that was at.

Nate Arnold: Gina, there was a problem with a fair number of VR agencies in terms of our data base and processing the reports in July. We have tried to figure out how to correct and be able to run them and in the end we just weren't able to get them done.
What they can do, I believe, is provide you with a list of the cases that were actually paid. We cannot actually run the whole report because it doesn't pick up all the denials. But if you need a list of allowances or something send a message to the help desk or if you need to check on individual cases, same thing. Contact the help desk and we'll let you know what happened with it on a case by case basis, if necessary.

Gina Haupt: Yeah, I will send it to help desk. We actually put it into our system to track it. All right, thank you.

Nate Arnold: We apologize for it and hopefully it was a one-time thing. I think August came off pretty clean so hopefully everybody got their reports or will get them shortly.

Gina Haupt: Okay, and I will sit back and if I don't get my question answered about Suitability I'll be back on.

Nate Arnold: I know you will. Take care.

Operator: Our next question comes from Eugenia Cox. Please go ahead.

Eugenia Cox: I've got a few things before the suitability questions. I've got about 10 - I don't know if anybody else received them - I got about 10 people processed through our state that didn't belong through our state and they did a reversal on all these people. Was that a glitch also?

Nate Arnold: No, that's purely, if that happened that's operator error or human mistake. Were they all paid to the same VR agency and they just had it backwards or what?

Eugenia Cox: They were all paid to us and then they had to reverse them all. But they were on our July list.

Nate Arnold: And they were from a real mix of other VRs?

Eugenia Cox: I have no idea because they don't tell us what VR they should have paid.

Nate Arnold: All right, well, I'm sorry about that. That's another one of those where if we don't input the VR code correctly at the time it's set up a lot of times nobody picks it up at the point that they are hitting the pay button and you know it ends up going to the wrong VR it's one more thing that will be eliminated when we move to the automated system to process this. So I apologize.
Did the money work out?

Eugenia Cox: I don't know because we're working to make sure because it was all on our list so we haven't gone through and compared, we just tried to file out these and we were, like, these people don't belong to us.

Nate Arnold: I appreciate you being on the ball and picking up on that because that will speed up us being able to get them to the correct VRs but if anybody has any problems with that with cases that they weren't supposed to get or they haven't heard from, again, let us know.

Eugenia Cox: The other thing not related to suitability but also, too, I requested, I asked MAXIMUS, we're trying to - I'm going to be do a session at the NENA conference. I was trying to get an idea how many of the State VR agencies are acting as ENs and they were able to give me a number of 14 and of the 14, three of them are Phase 1 only but they wouldn't give me the names of which states are participating. Why would that be confidential information?

Nate Arnold: I don't know it's confidential information.

Eugenia Cox: Yeah, I don't think they are embarrassed about it or anything.

Eugenia Cox: No, I would think they would be happy that we were doing ticket.

Nate Arnold: Tell me why you are interested in knowing?

Eugenia Cox: We just kind of wanted to get an idea of which states are actually doing, when we were having conversation or whatever, hey, there's a particular situation we know who to ask.

Nate Arnold: Well, when we have our quarterly calls you speak up on the calls so you kind of get a sense who is involved from the quarterly calls.

Eugenia Cox: We don't always know who's on the call.

Nate Arnold: We have a list. I don't see why there's any problem with that. You may be able to give each other some tips or share, help one another.

Eugenia Cox: So we can have that list then?

Nate Arnold: Yeah, we can share that with you. You don't have to go back to MAXIMUS, we will just send it to you.

Eugenia Cox: Okay, yeah, because we kind of wanted an idea because we need to know whether they are doing the full service on-going supports or just Phase 1 only so we know which situation. Because the majority of us are doing the full service so if we have questions and we go to a state that's only doing the phase 1 we are not asking the right people.

Nate Arnold: You can share the details about your model, we would just be sharing the organizations that are doing ticket assignments.

Eugenia Cox: Okay. Then as far as my suitability questions, a lot of us have already gone through these types of things to become state employees as far as fingerprinting and background checks and criminal histories and financial histories. Why doesn't that count?

Nate Arnold: We were told that if it wasn't processed through the Office of Personnel Management then it didn't meet the federal Suitability requirements. So it has to be processed at the federal level. We were hopeful that there was something in place that did meet the requirements and one of the reasons why we had not required anything extra of you all is because you were reporting to a Federal authority and we figured that your clearance would be sufficient, but when it comes to system security they are doubly cautious here because you will be actually connected to our system and so you could potentially have access to millions of records if there was some breach of people's earnings information and such, so in order to use the portal which will be attached to our system that we use for other reasons we have to have this level of security clearance.

Eugenia Cox: See, we have clearance, too, from the fact that we also use the SVEF data that comes through and we are audited regularly by social security to make sure we are in compliance. So we are actually hit from many, many areas as far as our compliance and access to data. That's why I don't understand.

Nate Arnold: We've always considered you our trusted partners and we haven't had, we haven't required a lot of you but I mean I'm not a techie but I know the SVEF or whatever, that stuff, that's not like a web-based system that could be breached, those are some kind of lines, telecommunication lines or something where data is transferred. There are differences in the way the information is made available that draws some of this too.

Eugenia Cox: I sit on a lot of committees with other employment networks and we are always hearing complaints about suitability and the length of time that it takes. Is that something that's going to be addressed?

Nate Arnold: We have done our due diligence in trying to run the process, find out where the bugs are, what things that normally cause a problem are. Natalie is going to be spearheading it. We're going to give you regional contacts, MAXIMUS is going to disseminate information I believe to all service providers, not just VR agencies, that will be helpful to you all and we will have some sort of orientation or training, I don't know what we're calling it, but there will be guidance to make the process easy and, you know, all of the forms will be mailed to the point of contact. So we're going to try to do everything to make the process work well but based on the information we have it looks like this is a manageable process if you just know what the pitfalls are. You make sure you sign that form that Natalie mentioned. You make sure the fingerprints are done on the appropriate form so we'll provide the right form in case the police station in your area doesn't use the right form. Things that were causing a problem we've tried to identify and make sure that this will be as clean as possible.

Eugenia Cox: And then the other thing, you had said that you talked to RSA with regards to the requirements as far as web browsers and things like that. Are we going to get that? Because we have to literally work through our system and that stuff could take whoever how long to dwindle down to us. We need to know because a lot of us use, like, the (inaudible) tracker system and we need to be able to make sure that we are, anything that comes through on the new Portal and all that stuff and access and everything, it's all compatible with our system too. We need to get that same information that maybe was shared to RSA.

Nate Arnold: Yeah, we will send you the requirements. They are going to disseminate them, you are probably going to get the same information from both channels but it doesn't hurt. We will attach to the meeting notes information, if they look like they tried to cover all the major operators systems and the variety of browsers that will work with each browser system but, yeah, the RSA has those. We don't control what applications and things we have on our computer. We did give that to them as an action item for them to make sure that whoever needs to know would be able to accommodate the people who are going to be using the portal with the right browser or no. And we'll follow-up on our end with them concerning the browsers because that's basically, the only real action item that they have. The other ones they are just graciously helping us disseminate information but that was something that we really need them to do.

Eugenia Cox: Okay, thank you.

Operator: Ladies and gentlemen as a reminder to register for any questions you may press the 1, 4 on your telephone. We do have a question coming from Kathy Smerden, please go ahead.

Kathy Smerden: Hi, this is Kathy Smerden, California. Yeah, with regard to Eugenia she had eight of them, the wrong states, we just had with one client, it was two but they rescinded it. I guess they caught it. Coded (inaudible) from another state.
Basically my question had to do with July. Do they plan to reproduce something for our records?

Nate Arnold: I don't think we can reproduce July. We're going to try to give you, we can give you the list of cases that were paid and then if you want to know ones that were denied we're going to have to probably figure that out almost on a case about case basis.

Kathy Smerden: Because basically I need those codes, those action codes, payment codes, 900, 950, pcd codes.

Nate Arnold: We can give you all the ones that were paid, the 900's, we should be able to give you.

Kathy Smerden: Okay. So how would we track our denials, would that be through the help desk?

Nate Arnold: If you have cases that you submitted before April and you haven't been told that they were paid then they may have been denied and if you send us a list we'll be glad to check them for you.

Kathy Smerden: Okay. One more thing, the register my SSA account, is that personal or something you do through the agency?

Desiree Fitzgerald: My SSA is a personal account. It's not exclusively related to the new Portal. It's a service SSA offers to the general public but in order for you to access the portal you would need to register for that service. It basically is a system that allows you to get to your personal social security statement to see your earnings over your lifetime, see a projection of the benefits that you would be eligible for if you were a beneficiary. You could see your benefits verification letter and that type of thing. So it's there for the public but in order to get into that system there's a process called authentication which basically verifies your identity. So since that's already in place we are using that to verify the identity of people who come into the portal. So if you register for your my SSA page and you enter our system using the web address that we give you for the Portal, the system will know that and it will take you through the identity process, you know, where you will have to put in your pin and password and it will send you a code to a smart phone, you put the code in and then you enter, it will let you enter the portal.

 If you come in and you are not using the link for the en portal then it will take you to your personal account with your personal earnings and all so we are piggybacking on that authentication process that already exists. But you will have access to your own personal information so you wouldn't want to share that access with a co-worker. That's why we're stressing that everyone needs to get their own access because this is more serious and, you know, you are saying when you go in there that you are this person. Whoever goes in using your information can get to your personal earnings records that we have. So it's important, you know, that all the folks who need to have access have it and that you don't share credentials.

 But, yes, the my SSA page, MAXIMUS has done a self-help module, self-paced module, that they are going to be disseminating and sharing and we may choose to do some other things too but that is, from what we've heard, most people have been able to go through it, the ones that have told us about it, without much trouble. But you do have to remember to ask for the extra security when you do it because you cannot use it with the portal unless you have the extra security.
We will have information to assist with all of these processes.

Kathy Smerden: I was just curious because I use my work email here, the Department of Rehabilitation, what happens if I want to go on personally and see what my earnings are, would it still accept me?

Desiree Fitzgerald: These are web based tools. You can go to your personal site any time you choose to. But you are not going to go to your personal site if you are using the web address for the portal, it will just behind the scenes authenticate you, it will say, yes, this is the person who has this identity and all is employed with this particular agency and authorized by social security to enter this portal. So it will take, you know, two steps. Normally when you go in you would just go to your information but if you go in using the portal address it won't take you to your information, it will just identify you and move you on to the portal.

Kathy Smerden: Okay. And the cell phone, can that be a land line also?

Desiree Fitzgerald: No, that's something that I wasn't aware of until recently that that has to be a smart phone.

 Kathy Smerden: Oh, really? Currently I can use my work phone and they call me back on it.

Desiree Fitzgerald: Right, right, the Secure Provider Portal you can use a land line. I have to find out a little bit more about this, but this is the requirement for the my SSA, it's definitely written there on the web site about the smart phone. I don't know why the distinction but we did have more flexibility with the contractor site. We have some stricter requirements with the -- and you wouldn't be able to share, I mean you wouldn't be able to forward like the code that you get to enter the portal, you won't be able to forward that to any other phone. It won't allow you to do that without being shut out of the portal. So those are the kinds of things that will be in the training module and will be available so that you'll know on an on-going basis.

Kathy Smerden: Okay, that's all, thank you.

Operator: And we do have a follow-up question coming from Gina Haupt.

Gina Haupt: I was curious when are you guys going to send out this information? Because for many of us, we're the only people that do this and the portal is a very vital tool in our position so I'm really nervous about the suitability just because, not because I have anything to hide, but because we have had people that we've all seen that maybe suitability hasn't worked very fast or they've been found not suitable and them trying to get a reason why they weren't found not suitable has been very difficult and then it's because of some stupid thing because they had to list their like six employers, then you have to have a contact number of every employer you ever had and then for some reason they decide xy and z they will find you not suitable. And that could cause VR to come to a screeching halt because that's how we verify tickets, that's how we get information for our agency so it makes me nervous because for some of our agencies we are the only people that have access to this information. And I guess I'm asking is there going to be extensions, when are we going to start this process because you are saying that you want us in there by December, even January, that's a really short time period given we don't even have the suitability paperwork yet.

Desiree Fitzgerald: Yeah, based on what we were told, the process of suitability that you are undergoing would be a 30-day process and that's from the beginning of what Natalie described through the clearance if everything goes smoothly, of course. Some of what you just described happens after you would have a decision from SSA.

Natalie Sendldorfer: The employers and that type of investigation will happen after the initial suitability decision. That will be when OPM gets it and does a more in depth background check. That does not affect getting into the portal at all. The initial suitability which would require you getting into the portal would not have that.

 After you get a decision from SSA, you would be able to use it. If you are approved to use this portal you would be able to use it and then there would be a 45 day period where OPM could do some of those types of investigations you just mentioned and make those contacts and they could overturn the SSA decision but you would be able to use the portal unless they came back and gave us some different information.
But we do have a schedule that would start activity this month. We don't have the schedule in the room with us, but we would be starting something this month, I know.

Desiree Fitzgerald: We're going to send out an email, we're going to send an email the beginning of next week outlining the entire process and after that we're going to send the email with the e quip applicant list.

 We will be sending it to the point of contact in our record so that person would be responsible for coordinating with the other folks in terms of the information that needs to go on the applicant list, but those people will get their own email with the link.

 They will have 10 days from receiving that email invite to fill it out. It will expire after the 10th day. Those are the things we want to point out up front in the orientation so we can avoid some of those wrinkles.

Eugenia Cox: Hi, it's Eugenia again. When you say it's going to be sent out to the point of contact you have on record, is that like our administrators? I only say that because our administrator is out for three months.

Desiree Fitzgerald: The point of contact, I'm not sure who that is. I'm thinking it's people like you but I will have to con firm who the point of contact is. I don't know, it's the person…

Eugenia Cox: That gets the email from MAXIMUS?

Desiree Fitzgerald: That get the what, the emails from what?

Eugenia Cox: MAXIMUS.

Desiree Fitzgerald: It would be the name on the website if a person were looking up on the choose work site and you have points of contact.

Eugenia Cox: Well, sometimes we get some emails, you know, and we're on the distribution list but sometimes it goods to even higher up than us and then we don't get copied. So can somebody please check on that to make sure that at least the people, and you know who a lot of us are, like Gina had said, a lot of times it's just one person in our agency that's doing all this work.

Desiree Fitzgerald: The point of contact should be who you want it to be, basically, but we were thinking we already have established points of contact in our contracting system. Because even VRs are in that system, even though you don't have contracts.

Eugenia Cox: I know it was somebody that had signature authority before and people, I think there was one state that actually got it at the governor's office and things like that, so I kind of don't, I just needed to have somebody distinguish whether it's like the signature authority contact or is it the people that actually do the work?

Desiree Fitzgerald: I mean we don't have any rules that are locking up who the point of contact is. You can tell us who you want the point of contact to be if the one in our record isn't the right one or that person can tell us, rather, but I guess we'll have to, Natalie, get a list of the points of contact in our record and communicate with those POCs about this process and the concern that was just raised. When you see the list you'll know if it's not -- the people that we deal with, we'll know that. But, yeah, you would have to be involved in this at the earlier point possible. The people we do not deal with normally we can make sure the information dissemination goes to you as well, but the official applicant list will be coming from the point of contact to us.

Eugenia Cox: Okay.

Desiree Fitzgerald: We'll make sure you have the name of the person we have so if that person is unavailable for months or whatever the case might be.

Eugenia Cox: All right, thank you.

Nate Arnold: I want to thank you all for your attendance and your questions. I saw something on the chat line about the need for the denial codes in many cases and we certainly understand that. My understanding is that the bug that we encountered did not affect the fact we don't have the codes, we have them in the system, we just can't get the report to run for you.

 Again, I know you guys have all heard me whine about what an antiquated system it is. The analogy would be you can't get the wipers to work if the air conditioning is not on and that's kind of what we're up against in this case and I'm hoping it was just a one-time problem in July. So when you get your august reports if there are cases that are older than what you are seeing processed that you did not get an allowance for or that you haven't heard about, let the help desk know and we'll look up the codes for you and certainly if it was a July case we know we had problems, I don't want you to have to worry about days and filing reconsiderations or what not. We'll take those on a case by case basis and certainly be flexible.

 One other reminder. I believe, looking ahead, October right now seems like it's light-years away but it's really not far around the corner. Our next monthly call is scheduled to fall on the day after Columbus Day. Consequently the general policy is that we don't have calls on or the day after holidays. So I believe there will not be a VR call in October unless there are special circumstances or something. So stand by and we'll talk to you again presumably in November. Thank you everybody.

[Call Ended]