**Welcome –** Felix Stump, Deputy Project Director of the Operations Support Manager (OSM), welcomed participants, went over the agenda and turned the call over to Sallie Rhodes.

**Online Benefit Verification Letters**

Sallie Rhodes, Ticket Program Specialist, provided an update on an upcoming change at Social Security. Local offices will no longer be providing hard copies of Benefit Verification Letters for individuals with disabilities. Social Security now has an online process for obtaining these letters and has created a 15-minute webinar that explains how to use this new process. View “Benefit Verification Letters Online” at www.social security.gov/webinars.

**Updates**

Next, Felix provided a few updates from the OSM:

* IWPs and Ticket assignment requests submitted through January 31st are currently being processed.
* Annual Performance and Outcome Reports (APOR) are due by Friday February 14, 2014.
* A new Portal function, called the Monthly Earnings Estimator, is coming soon.
  + This tool will help ENs determine whether a beneficiary’s monthly earnings are likely to qualify for payment under the Ticket program. Since other factors come into play when determining eligibility for payment under the Ticket program, it is important to note that this is just an estimator tool and qualifying earnings does not necessarily guarantee eligibility for payment.
* An email blast went out to selected Workforce Agencies regarding payment agreements. Social Security is in the process of putting together an FAQ document for questions that have come in regarding this issue.
* ENs may now view manual Tickets in the Portal.
* Information on terminated Tickets is now available in the Portal.
  + On a monthly basis, ENs will be alerted by email if they have any terminated Tickets.
  + These email notifications will not include information on who the individuals were or when their Ticket were terminated. In other words, the email will not contain any personally identifiable information (PII).

**BASS Email Campaign**

Don Jones from the Beneficiary Access and Support Services team (BASS) spoke next about an email campaign being launched next week. He discussed the objectives of the campaign and the process it will involve.

* The objective is to empower beneficiaries to make informed decisions about whether or not to participate in the Ticket to Work. Once a beneficiary decides to participate in the program, BASS will provide information to help ensure their success, whether it is working with an EN, finding a job or maintaining his or her current employment.
* BASS will initiate this four phase campaign by sending a blast email providing information on the program. Then participants will be given the option to join one of several lists including, how to pick a service provider, looking for a job, getting a job and managing a new job. They will receive email messages pertaining to their selected list(s) every week after joining. Participants can unsubscribe at any time, change lists at any time, or opt to receive all the messages at once.
* In the first phase, BASS will send emails describing what the Ticket to Work program is and providing information to dispel some of the myths about participating in the program, e.g., myths about losing benefits, losing health care, etc.
* In phase two, BASS will provide information about ENs, e.g., what they are and how to decide which EN is best for a particular beneficiary.
* The third phase will focus on the job search itself and covers topics such interview techniques, resume writing, and discussing the need for accommodations.
* The last phase will cover how to keep beneficiaries on the path to financial independence once they obtain employment. Information on managing a budget, avoiding overpayments, getting a bank account, accessing finance resources, and information on Partnership Plus will be provided.
* BASS has the ability to tailor the messages being sent based on demographics such as age.

**Conclusion**  
Felix Stump thanked Don and opened the discussion up for questions from the audience.

**Questions and Answers**

**Q:** *In regards to the BASS email campaign, did I hear correctly, are you going to send emails out to only 150,000 people when there are 12 million beneficiaries out there? Is that because that's all the email addresses you have or it's just a test and you are going to see how it works before you really roll it out because 150,000 isn't a lot of people.*

**A:** 150,000 is the emails that we have so it's people that have provided the email address via the call center, via our website or via conference calls. That collection of email addresses is going to continue on an on-going basis. The call center only started collecting addresses less than a year ago so we are limited in terms of that. We cannot send folks this information simply as a default blast at this point. They have to opt in to participate.

**Q:** *Is there any way we can get a look at the kind of messages the beneficiaries will be receiving from BASS?*

**A:** Yes you may sign up for the email program yourself. This will allow you to receive the same emails as the beneficiaries do.

**Q:** *Out of the 150,000 emails is there any way you can divide them up based on geographical location?*

**A:** We will be considering geographical targeting in the future.

**Q:** *In relation to the online benefit verification letters, will the BPQYs still be available?*

**A:** Yes, they will still be available. The only thing that is changing right now is how beneficiaries can access benefit verification letters.

**Q:** *I have several Ticket users who we have been working with since 2005 when we first an EN. We have had no contact with them. If I created a list and sent it to you as discontinuing services, what else would I have to do? I suppose I would have to contact each individual, is that correct?*

**A:** If you have tried to contact them without success in the last several years, you can send us something in writing or use the Portal to request unassignment. If you send the request in writing, you will need to give us your DUNS number and a list of the Tickets you wish to unassigned. If emailing the information, make sure you protect all personally identifiable information by sending it in an encrypted attachment and send the password in a separate email. OSM will then proceed to process these unassignment requests.

**Q:** *We are an EN and we don’t show up on either the IVR or the Ticket to Work website. I am wondering if it's because we have not submitted our APOR yet or if there's something else that we haven't done. We were on the system maybe 3 weeks ago but, as of right now, we are not showing up on anything.*

**A:** That is a different issue not related to the APOR since it is not due until February 14th. We will have an account specialist contact you first thing tomorrow morning.

**Q:** *Is OSM the call center manager?*

**A: No.** As the Operations Support Manager, our major role is to handle the EN operations. We assign Tickets, process payment requests, and sponsor the provider website. We are responsible for EN development, ongoing training, technical assistance and general support for Ticket to Work service providers.

**Q:** *I am looking over the APOR, just a quick question. Community Based Work Incentive Counselors, what does that mean?*

**A: This term refers** to anyone who has gone through accredited work incentives counselor training or training to provide benefits planning assistance. The question we are asking is if you have anyone on staff that has been certified to provide work incentives information to beneficiaries.

**Q:** *If you received a beneficiary referral CD and an individual's name it on that CD, is the assumption that the Ticket is assignable?*

**A:** Yes, with the caveat that the Ticket was assignable on the day that OSM pulled the information to create your Beneficiary Referral CD. This means there is a little bit of a time lag between when the information is pulled and when you look at it.

**Q:** *Do State VR agencies have to do the APOR?*

**A:** State VRs are not required to submit the APOR?

**Q:** *Regarding the 2014 APOR question 7, we are in the process of signing up for the OFCCP 503, but have not officially signed up. Should I mark “No”, even though we are in the process?*

**A:** Please mark No as the APOR is about your EN activity for 2013.