**All State VR Call**

**3 – 4:30 p.m. ET**

***The OSM provides transcripts in a rough draft format created via Live Captioning which was performed to facilitate Communication Accessibility. These transcripts are not verbatim records of training sessions, webinars or conference calls.***

Operator: Ladies and gentlemen, thank you for standing by. Welcome to the National All VR Call. During the presentation our participants will be in listen only mode. Afterwards we will conduct a question and answer session. At that time, if you have a question please press star followed by the number 1 on your telephone. If you need to reach an operator at any time please press star then zero. As a reminder this conference is being recorded Tuesday, July 14th, 2015.

 I would now like to hand the call over to Miss Regina Bowden, Office of Ticket Provider Support.

Regina Bowden: Hello, everyone, thank you for joining us today. We have a full agenda ahead of us and a lot of good information to share with you.
Briefly we're going to cover just a general announcement then we'll cover our cost reimbursement update, our ticket portal update, then we have a special treat, we have guests from Iowa who will talk to you about Partnership Plus in Iowa. So I'll just go ahead and get started.

 The first general announcement that I have is in reference to the temporary suspension of the eQuip system. The eQuip system is the OPM system used to complete and submit background investigation forms. As we understand we have about 9 VRs who are still not approved for the portal. OPM has taken down the eQuip system and it could be off-line for 4 to 6 weeks while security enhancements are implemented. There is a web site that we will make available to you and if you want additional information about the equip system and any other updates OPM provides, but this is out of our hands and this is something that is under the control of OPM so we are going to jump into our agenda today and I will turn it over to Danielle who will give you an update.

Danielle Armstrong: For the month of April we cleared 2,021 claims. That currently has us pending a little over a thousand claims. One thing I wanted to let everybody know, we are trying to get that done as well while continuing to process the cases you are sending in. You may in the next couple weeks or so get contacted from the VR staff asking you to resubmit certain SSNs and that may be some pages are missing, something didn't come through on the fax, just to follow-up with you to make sure that we get everything that we show as pending processed for you as soon as possible. So just look out for that if you do see those requests that's what it's for.

Regina Bowden: Okay, thanks, Danielle. Desiree is scheduled to be on next to give you an update on the portal but Des isn't here so I have some figures I want to share with you. The portal went live on June 15th and right now we have 633 individual users in the portal. We have 335 ENs enrolled in the portal and 57 VRs. Just to give you information, ticket assignment and unassignment in the portal is 3,162 and payment work cases that have been created is 4,763. That's just an update on some numbers for the portal and the users.

 The only other update that I have, and then I'll turn it over to Katie, is in reference to the potential payment report.
Now, last March when we went through the QBER, we said we would notify you quarterly of cases where you may qualify for cost reimbursement payment. This is essentially a heads up and we're happy to begin that new service.
Last week we sent to you the encrypted quarterly potential payment report and then after we sent the report, we assigned and communicated a pin separately.
This PPR, Potential Payment Report, alerts you that individuals to whom you have provided VR services might potentially qualify you for a cost reimbursement payment. To qualify for the payment, though, you must submit a payment claim that we determine meets all the non-payment related criteria. This was the case with the old QBER file also. So again you should have received your report and the pin, so we hope that this report is useful to you. If you have any questions about the report you can let us know and you can contact us at the VR help desk and that address is VR.helpdesk@ssa.gov. At the end we'll have it open for questions.

Raquel: Hi, everyone, this is Raquel. I see a lot of people are asking about the PPR if you did not receive it send an email to the VR help desk and we will make sure, or if the wrong person received the email just let me or the VR help desk know who you want to receive the report on a monthly basis and we'll make sure we change that email address for you.

Regina Bowden: Thanks, Raquel. Now I'm going to send it over to Katie.

Katie Striebinger: Hi, good afternoon, everyone. Hope you can hear me okay. I'm going to do an overview of some functionality in the ticket portal that will help you do your business. I'm going to go over individual ticket assignments, batch ticket assignments, how to update closure statuses, any ticket assignment errors you may get and some general information to help you.
I do want to point out that we realize some of you are not able to access the portal yet. We will be trying to accommodate you through the processes we have in place so you can get into the portal and everything I'm going to go through here on the slide is in the user guide. If you have not had a chance to get the user guide, we have instructions how to access the secure side where the user guide is stored and you would have gotten that in the welcome email if you are registered for the portal. So once again everything I'm going to cover here is in the user guide, I just want to give everyone the information here all at one time and we are going to take questions at the end.
The first thing I'm going to cover is individual ticket assignment. From the main menu, navigate to the individual ticket and history page. By checking on ticket availability by SSN the check assignability page allows you to check the assignability of a single social security number. You have to enter an SSN this screen is also the first step for assigning a new ticket. It's not going to let you assign a ticket until you do the verification that the Ticket is assignable.
You enter the SSN and click search. This is the first half of a screen. You will see information like the ticket number, when it was mailed, whether or not the ticket is currently in use and by in use we mean has CDR protection, if the ticket is terminated and if there have been any ticket payments. It will also indicate if there were earnings in the last 24 months.
You will also see -- just to clarify, earnings in the last 24 months will give you some general information. It will tell you how many months they had at trial work only level if that's the only level they achieved, the number of months at SGA or better and if there were no earnings that reached trial work level.
If the ticket is previously assigned to another VR you can see that here in the screen on the box. If the ticket is assignable you will see two buttons appear here. You want to select open a VR case for your VR cost reimbursement case. Assigning a ticket will put it under the milestone payment act so you want to use open a VR case for your case openings.
Then you can see here the screens side by side. If you click the first button, open the VR case, you will be taken to the open a VR screen which is another indication of what you have chosen. If you did not mean to open a VR case you can click cancel and go back out. You need to enter either the assignment date or the case assignment date and you need to enter a first and last name that matches our records.
The next thing i want to cover is individual ticket assignment.
The way the portal is set up, you can work on actions for a ticket or beneficiary based on one of two lists. There is a list of beneficiaries currently assigned to me or list beneficiaries formerly assigned to me. So all the beneficiaries you have ever worked with will be on one of these two lists.
Now we're going to do unassign a ticket so you will click on list beneficiaries currently assigned to me. You are going to look for the person's name on the left here which is blurred out, and you see next to each person you can tell when it was assigned to you, the payment method, v being cost reimbursement and o is also a possible option. If there have been any claim months paid here in that column that is for EM ticket payments. The VR payments are not in the system yet, that will be some time in the spring so this is giving you EM payment information and it will tell you if it was paid to you or someone else or if there are no payments yet.
Then what I want you to do to unassign a ticket, you are going to click on the actions menu on the very side next to the beneficiary's name. You are going to bring up the more actions menu. As you see here, these are all the actions you can take for this beneficiary. You will have options on this screen relative to the beneficiary you clicked on. Since this case is currently assigned you have the option at the bottom unassign or close this case. We are going to select that option.
So if you choose close the VR case and the case is currently assigned to you with a v, you will see the close VR case screen. You are going to put the case closure date and indicate whether or not the case was successfully closed.
If you are unassigning the ticket then it's going to prompt you for the ticket unassignment date and you need to put in the request for the ticket unassignment.
Once you hit submit, this beneficiary is no longer assigned to you. This is happening in real-time. The beneficiary will move from the list of beneficiaries currently assigned to you, the top link, and many -- will go to the list of beneficiaries formerly assigned to you.
Now I'm going to show you how to update the individual closure status. So you are updating a closure status for a closed case, you are going to navigate to the link there, list beneficiaries formerly assigned to me.
As you see here, this was all the beneficiaries formerly assigned to you. You are going to pick a person, because you are updating the closure code, who have a v on the right, those things are very similar. You see here there aren't as many options because the ticket has been unassigned. You are going to see the option there, update VR closure status. From there you can see the date it was open to the day it was closed and then you can click a radio button that pertains to the case, either successfully or unsuccessfully closed, and click submit.
Now we'll update the closure status. If you go to the check assignability by SSN and type in the SSN, you will see the closure status has been updated for that ticket.

 The next thing I want to go over are ticket assignment errors you may get. The first thing that has happened is someone has assigned tickets incorrectly using the wrong options. Because you can accidentally assign a case when you mean to open a case or open a case when you mean to assign it, there is a way for you, yourself, to fix this without having to contact any help desk for support.
If you accidentally assign a ticket instead of opening a case, or vice versa, you can change this from the beneficiaries currently assigned to me main menu. Click on that top link, please.
You see here like for instance the case on top has v, you meant to make it a m or you meant to make the m a v, you go to the actions menu next to the beneficiary and you will see the option on the bottom, convert ticket to VR case or convert VR case to ticket.
There are some rules here. You cannot convert a VR case to a ticket after 90 days. That 90 day rule still applies. Instead of having to notify someone about changing it for you, you can change it yourself in the system. You can convert a ticket to a VR case at any time as long as there have not been any ticket payments. As long as that option shows up in the menu, that option is available for you to convert the case.
As you will see, it gives you some information. Then you hit submit and it changes the case to the proper category.
Now I'm going to go over the batch ticket assignment. If you see here in the middle, this is a new option that was recently deployed, this is where you are going to upload the batch files. Right now many of you are using move it to submit the files to MAXIMUS. Our plan is for you to use this screen and the portal to upload the files yourself.

 Now, I want to stress if you -- I believe MAXIMUS is up to date, all the June in use files, if you have not received confirmation that your file is complete and received the results back, please do not use this to submit your files until your June files are complete.
Now we'll go over how to do this. You are going to have 3 choices of the type of files to update. Your in-use files are going to be option no. 1. That is the type you are going to want to use. If you use type 2 you will end up assigning these tickets and that is not what you want to do if you are planning to upload your case opening.
The first thing you have to do is you have to enter a unique identifier for the request. It is a one-time -- for your own purposes it will probably be easier to come up with a system so you have an identifier you associate with your file. Once you use it, you can't reuse it again, you can only use numbers and upper case letters. You can try going through the alphabet for a while but we are not really tracking that anywhere so don't worry about if you see anything meaningful, it's just something for you that's a unique identifier so you can keep track of everything.
So you are going to click the type 1 here like a CBR open/close case files. You see the radio button, change email notification, you will receive a notification when the files have been updated and the results are there for you to see.
If you use the previous portal to perform batch ticket assignments and unassignments, you do not need to make any changes to use this in the portal. Besides 1 the portal does not allow txt files. You will have to convert your files to ESV file and that is a carrier requirement of the portal.
When you upload these files you may see different results. We are not going to be manipulating the date that you enter. The date you put, the IPE date here, if you see on the screen we're showing an example, the first row, 1, 2, 3, 4, 5, 6, 7, 8, 9, the IPE date for this assignment July 1st, 2012. If you accept that date and that date is taken by the system, that is the date the ticket is going to be put in use, even though that ticket is more than 90 days old. We will not be converting that date to a date days from now. Once again, we are not going any data manipulation. This is a change for how the process sg going to work.
Just so you know, the ticket is not assignable on the date you assign it. Only the current process which looks for the most (inaudible) changes the date you provide and puts another date in the system, that is not going to happen. If the ticket is not assignable July 1st, 2012, the ticket will not be put in use.
The link you want to do the uploads, we'll show you the file processing status of uploads in the last 30 days. This is another example of what that screen looks like. It will show you all the files uploaded within the last 30 days. You have the receipt date, which is the date it was uploaded to the portal, the file id is the id you came up with in order to upload the file. The file type, the files in the drop down, 1 is case in use. The person who uploaded it, the complete he date when the file was actually completed and uploaded by our system. If you have a large file, it can take a little longer than the time you submitted it. If there were any errors they are displayed here.
Ready means someone has already downloaded it once before.
I wanted to give you a little detail here. There has been a change from the report that you are going to get back. You are not going to have a header row. This is just an example here of what the file will look like. Also the leading zeros are not going to be there on the file.
I'm just going to read a few things on the screen here. (inaudible) terms will be different. I know you are used to your naming convention and the file you get back has the same convenience. It is going to give it a unique name here but you can change it if you need to change the file name for the way you are keeping your files.
One restriction is column e cannot include special characters that are restricted. Once again i do want to point you towards the user guide for any questions about how to process these files. This is just an overview or a highlight. The user guide has all the details and instructions. If you do have further questions please contact the VR help desk and they will route you to someone who can give you further details about how this should work and how you can process these files. We are here to help you and support you and we want to make sure you are able to use the portal to process your files.
Once again we're going to hold questions and answers until the end so I’m going to give it back to Michelle.

Michelle Laisure: Thank you so much. As we did for the All EN Call, we'll take a few calls now prior to our effective practice presentation. I know that we have one question from the chat line we want to go ahead and bring to your attention. You want to read that?

Ana Morales: Yeah, the question isn't specifically about the clean-up files. The VR is inquiring if they are going to be included in the ticket portal.

Katie Striebinger: No, the clean-up files are not in the ticket portal and they are not going to include it in the ticket portal. The ticket portal only includes assignments that were processed in our system and those were never in SSA's system.

Ana Morales: Okay. And I guess a lot of ticket coordinators made the comment that they did not receive the PPR report so they are asking if it can be resent to them directly and also the email from the payment information.

Katie Striebinger: Based off of the -- just the comments we've gotten off the chat line, it appears as though it went to the signature authority versus the ticket coordinator. Is that correct, Ana?

Ana Morales: It went to the signatory authority on the record and once again if they contact the VR help desk, they can make sure it's either routed to them or resent.

Michelle Laisure: Thank you. Operator, let's open up the phone line. We'll take 3 questions and then move it into our Effective Practice presentation. Do you want to open the lines, please, operator?

Operator: Your next caller is from the line of David Leon.

David Leon: I really need to understand what we can do for the anywhere from 50 to 150 cases in each file I send that are transition cases that did not have benefits on the date the IPE was signed that I find out have a ticket and were being placed in use automatically. This has a huge impact on us. I need to know what the answer is and how i know to change the date of a case from the date listed to a new date. I'd also like to know what the zero code is. You said you were going to go over that and i missed it if we did. But the more important piece is those transition cases and other clients who begin receiving services without benefits but who have applied. What is going to come back to let me know to change the date and if i have to manually change the date on anywhere from 15 to 20 thousand cases, that's an extraordinary amount of work.

Michelle Laisure: Katie, do you want to address that?

Katie Striebinger: I'm trying to think of -- I want to give an answer that everyone, can tell everyone but I also want to work specifically with you on how to work that out. You know, we did just implement this process and we are trying to work out the kinks and do something that will work for everyone. I fully understand trying to update 15,000 cases is not as easy as updating two.
I believe the system is going to return a date that the ticket is assignable and you would just need to change that date that you are submitting to the date that it is assignable. You know, the date that in column d that we've been calling the IPE date, that is a carry-over from the legacy file. That is actually the date that you want to assign the case, open the case.
As long as the IPE, the date you assign the IPE, that's your IPE date. If you are working with that person and they are working with you and assignable, we'll say the date it comes back is a couple months later, you can change that date to the date it is telling you the person actually has a ticket. Often you are using dates before there is even a ticket. We want you to change that date that you send us from the IPE -- we're not asking you to change your IPE date, keep that date but send a different date in the system, the file should be giving you back a different date you can use which is pretty much what MAXIMUS was doing. You would submit a date that you open, they would look for the first available date then use that date to assign the date in the system. With the way things are working with this new file upload, you yourself are going to have to change the date because we don't have a middle person or a middle system in the place of max star that is doing that for you. That's what the current move it process is dog, you are sending the fail to MAXIMUS, they are manipulating the data before they send it to SSA then giving you the file back. Does that help? If you have specifics you can email me directly, katie.strivinger at ssa dot gov, name is strievinger, if you can't remember my name you can send to to the help desk and they will route it to me. Make you feel better at all?

David Leon: To be clear though, are they going to have a different code so i know that any that come back that say 17 are cases that i need to look at the date and resubmit again with a new date? That's part of what I'm trying to figure out. There's no indication from what came back when i was testing to know that any of those cases wouldn't have made it through and that i would have had to manipulate the data again and resubmit. So i'm trying -- otherwise you are still asking me to manually look at 15 to 20 thousand records in a file and be able to figure out where it looks like there might be a disconnect or discrepancy to send it back in.

Katie Striebinger: I completely understand and I will have to get back to you on that.

David Leon: Because this is kind of, you know, a huge change and i love how we get 10 minutes on a call to really absorb what this might mean. It's not well handled in my opinion.

Regina Bowden: Thanks, Katie. David, as Katie says, she's given you her email address and we have the help desk but she'll work with you on an individual basis. Thanks a lot.

Operator: Your next question comes from the line of Annie Zulfran.

Annie Zulfran: My question has to do with the PPR I received mine because it went to our commissioner but then we ended up being able to get on to the email so I opened it today and basically found a list of 7,991 SSN's. So this report is not going to be useful to me, obviously.
Now, before when we had QBER I was able to take the handful of people I had per month and feed it into there and find out if they had wages. These were all for people who I knew had moved out of state or were working for the federal government. I have access to all the Texas wages, I don't need any of that.
Since this PPR is going to be utterly useless to me, I'm looking for a replacement for the QBER. Can I email somebody and they can get the list for me, but don't want to submit a bunch of claims on a wing and a prayer, hoping they have wages when i don't really know if they have wages.

Katie Striebinger: Thanks, I will take that. The PPR is a work around for the QBER because of PII concerns we cannot give the earnings information. The PPR is essentially a heads up. We look at the last two years to see if there are enough earnings to qualify, then we send you this heads up so that you would have to look at the social security number and determine the case open and closure dates and if there are -- and then have to locate the earnings.
Essentially that's all that we can do for now. But this is a heads up, these are people that have earnings on the record and we identify that as potential payments for you.

Annie Zulfran: So it's not going to help me at all. Besides, we have a tracker for Texas. We have a tracker that helps us coordinate, we send our files in to the Texas work force commission and they send us a list every quarter of people who have made wages. So i don't need that list.
I need access to a federal -- remember, now, we all have clearance through the federal government in order to do this job. We should have access to something where we can look up the people we actually need to look up, which is the people who are working out of state or for the federal government. And as far as PII goes, we change PII every time we send in a claim.

Regina Bowden: I understand. But again it's mostly has to do with the earnings. It's information that we are no longer allowed to give.

Annie Zulfran: Who made that rule?

Regina Bowden: That is an agency rule. You know --.

Annie Zulfran: So you just made up that rule, is that what you're saying?

Regina Bowden: No, we didn't make up the rule, it's earnings information that we in the past were giving to you but because of the PII concerns and so on we're no longer at liberty to give out that information. I have our deputy commissioner here. Rob, do you want to say something to answer that?

Rob Pfaff: This is Rob. This is based on guidance from our office general counsel and the policy and disclosure of data that's derived from IRS information, essentially. We also had agreements in place and with I believe it was child support that helped us to obtain this information. And those agreements are in the process of being revised. They have an expiration date.
Now, the previous version, from my understanding, again I'm coming into this at the most -- at the most abstract level or the furthest inner working, the type and nature of how we were going to use that information and the period of time for coverage, all that has come to fruition and we are in the process of working with new agreements with child support, but in addition to that, the transfer of that information, we have been advised from our general counsel that releasing that information to a third party, we were advised not to continue releasing that information.
But we are continuing to identify what options we have internally in terms of disclosure issues and working with IRS to see how we can navigate through this. This current process that we have, I understand your point. We will continue to try to work around these issues and, you know, consult and to give you something, attempt to at least work internally to give you something that will get us through this phase as we're going through this. But that's, I mean, what I know from my level at this particular time -- that doesn't give you what you are looking for which is a quick fix in terms of a specific solution right away, but that's the information that I know.

Annie Zelfran: Okay, so to summarize all that, there might be something in the future? Is that what you're saying?

Regina Bowden: We can certainly take it back and work the issue further and discuss what our options are internally and we'd be willing to do that. We're trying, this is an attempt that we've made and we'll go back and we'll discuss and see if we can make enhancements.

Annie Zelfran: Well that would be great. Because the only other solution here is whenever I see anyone working out of state or from the federal government is to send in claims willy-nilly and that's going to affect our rate of reimbursement. Instead of my looking like 95 percent of my claims are paid I'll look like 72 percent of my claims are paid because I'll get a ton of denials. There's no upside for us at all in this process right now.

Rob: I understand.

Michelle Laisure: Thank you. And Rob thank you for coming on to our call.
For right now we are going to ask anyone and everyone who has questions about the ticket portal to please submit those to the VR help desk and we will continue this conversation next month, it will be first on our agenda and possibly even use many of the questions that we receive as a q and a to do a follow-up on many of your concerns as well as the uploading of the batch files. We know that's a new process, we have some processes to work through. I want to thank Katie for all of her work on that and the revised handbook which is available on our secure ticket portal for those of you who have not had access to that yet, that's where you can find it and find the information that Katie shared with us today. So thank you again for our speakers on that issue, Katie, Danielle and Regina at this time it's our great pleasure to share with you our Iowa Partnership Plus presentation. We are going to shorten it just a little bit so we can end our conference a little after 4:00, but we are excited about many of the grass roots efforts that Iowa has put in place for Partnership Plus. At this time I'll turn it over to Leslie who will do an intro.

Leslie Barrett: My name is Leslie Barrett, I am an account specialist with the operations support manager and it is my distinct honor to enthusiasticly welcome you to today's Iowa Effective Practices presentation. If you build it they will come, field of teams. We have 3 state partners from Iowa who will discuss common goals they have built in Iowa to create a field of teams, to develop a successful win-win Partnership Plus strategy.
Today you will learn about how their agreement was developed, how state agency coordination occurs and what post-VR services are provided including the crucial component of benefits and work incentives planning. They end of the presentation we'll be happy to take any questions that you all may have.
Without further ado I'd like to introduce to you each of our speakers today. Our first speaker, Leanne Russo, is a rehabilitation counselor. Our second speaker, Carrie osterhouseworks at the Iowa department for the blind and she brings 13 years of experience to our Partnership Plus model. Our third speaker, Sheila, works with the Iowa work force development through dal with a grant through the social security administration and she brings 33 years of experience to our Partnership Plus model.
Today's objectives for the presentation, as you can see here, are as follows. The to learn how the coordination occurs, to specify services provided to the beneficiary and then highlight growth and results for all of the agencies as well as the beneficiary.
The map here is just a data map showing where the ENRV work force is located in Iowa. Without a doubt it's all centered in the center of the state this Polk County.
For time purposes I'll breeze right through this slide and have Leeann and Carrie take it away.

Lee Ann: Hi, this is Leeann and first of all I want to thank everyone for having the Iowa team on the webinar today. VR or IVRF has been in building mode for at least 5 years. The administrator, David Mitchell, reached out in 2012 so he began to ask all Iowa ENs to begin establishing a partnership agreement with Iowa VR his goal was to increase the number of beneficiaries entering the work force and that's really the same goal as all 80 state VR agencies, to help people with disabilities become employed.
So VR reached out to current and potential en's, our goal was to expand options for ticket beneficiaries, we did some marketing and we did this knowing that en's help keep clients engaged and achieved optimal employment. Really, that's everyone's goal.
So Iowa voc rehab certainly doesn't want people to disabilities to be relegated to a life of poverty. We know helping a beneficiary get to work helps everyone and most importantly the beneficiary thels.
IVRf was encouraged by success in other state VR systems in addition to federal state partners (inaudible) there are other federal influences within our work and that of the department for our blind, which is our sister agency, so Carrie will talk about that now.

Carrie: Thanks, Lee Ann
last fall IVRF actually reached out to the department for the blind in creating some Partnership Plus agreements. We currently have two in place and help to increase that number as we move forward.
In addition to some of the goals that Leeann talked about, our goal is to really ensure that benefits receive benefits counseling as well as ensuring that our clients have follow along services and supports in place once their VR cases are closed. Really, this is Iowa's vision and it's supported far beyond Iowa. I want to talk about the role the OSM has played to help develop or improve upon the Partnership Plus activities in Iowa. They really are awesome. Leslie has been great to work with, Ana Morales too. Last year Ana and Leslie traveled to Iowa to meet with current and potential partners. Partner to that they had a teleconference and that was a statewide call to build bridges between Iowa VR and ENs. We talked about vision and (inaudible) to make sure the beneficiary wasn't dropped after their VR file was closed.

 We also talked about how to improve our processes. So we're always interested in that. I do want to acknowledge that awesome staff provide almost immediate answers to questions or concerns or road blocks so Leslie is great. She's been a great support and provides assistance to all stake holders, state agencies and partners alike.
In my role as VR's ticket coordinator I help establish Partnership Plus agreements, we have a memorandum of understanding and we can complete that within a month or an interested party. We do market Partnership Plus and ticket to work activities. I hope develop forms, help with tracking, we've had 91 handoffs between last October and the end of March. We get our web sites maintained within our system and I also help develop staff processes.

 To reiterate, Iowa VR wants to be an active and responsive partner to ENs in Iowa. Our goals going forward are to increase VR to EN handoff, to increase ticket assignments and increase ticket payments.
I mentioned the recruitment and partnership round table that awesome, VR work force and EN partners participated in last year. This has probably been the most valuable piece I'd like you to take away from today's conversation. This two-day event resulted in an event that was very well attended, increase from 6 partnership partners to 12 within one year. Leslie provided tangible on site step by step training on completing an RFQ and the walk-through process on becoming an EN, awesome provided updates from SSA, talked about available technical assistance and support and helped build and momentum in Iowa.
Within our current system Iowa voc rehab now ensures that every beneficiary coming to our system receives benefit planning services. We've trained internal staff in the finer new answers of benefit planning counseling and also have access to other (inaudible) when a case is too complex for us to assist with. Iowa has an active team that supports the field staff and when i say it takes a team, it really takes a team.
Voc rehab has benefits from conversations with awesome. I mentioned we have expanded our pool of ENs and now have 13 and this is a great pool that VR candidates can access once their file is closed.
One of the selling points for Partnership Plus agreement and having a job candidate continue working with an EN partner is it protects a beneficiary from continuing disability review and provides a variety of support services, some of which include follow along, benefits counseling, communication with social security, job coaching, transportation and even education and training. I won't tell you what SSA have to say about Partnership Plus and but I will conclude by saying it's a win-win for VR, Partnership Plus and beneficiaries.
I mentioned the 13 current partners that Iowa voc rehab has. We appreciate each and every one of them. They help make the process as seamless as possible for the beneficiary.
As far as data goes, you can see the sure numbers and individual ticket holders has increased since we began to really address the processes for beneficiaries. As a note, 147 of the 2205 of successful closures in 2015 achieved substantial gainful activity. We strive to achieve this as a partnership versus a competition.
What we built requires us to keep in mind the following. We can't do this alone. We must make the process as easy for all parties, especially the beneficiary. Once you establish a good foundation, if you build it they will come. Right, Sheila?

Shelia: Iowa work force development has been an EN since 2007. We started with one work force center in newton city, Iowa, then decorrah, Iowa, then we decided this was a good option for every work force center so we formed the state employment network that involves all the other ofrses except for now there's three that have become their own EN. So we've grown over the years in what we do. You can get all the services through the employment network that you would get through a regular work force office or a one stop.
We provide the job search, job matching, on the job support, continued classes and computer classes, plus anything else.
Some of our work force centers -- well, almost all of them -- tailer some of the classes they are offering (inaudible) in the community.
One of our key services that we have implemented since the disability employment initiative is the disability resource coordinator. So we have 5 pilot offices out of 16 that have these resource coordinators. That's the disability subject matter expert that's housed in the office. Not only are they there to assist customers with disabilities but they are there to teach staff to role model how the approaches are with people with disabilities and what specific needs they have such as accommodations.
All those disability resource coordinators are certified benefits planners so it really makes it nice, too, because we have a good relationship with the WIPA but there's just not enough of them. The WIPA is the work incentives planning and assistance project from social security. There's just not enough of them to go around the state but it really helps have those 5 pilot offices for them to tap into services.
Why do we use Partnership Plus? Beneficiaries can receive follow-up services if somebody is, assigned their ticket to the work force EN or any other EN we know they are going to get follow-up services to help with their success.
By giving them follow-up services it helps people sustain their jobs for longer. (inaudible) maintains, improves accessibility. So we can help that individual with any accessibility needs they may have. The ticket to work income i think a lot of people kind of shy away from how that income improves their services but we kind of take that on as a good way for us to improve our services by becoming more accessible, being able to buy things like the big screen computer screens and other items that they may need.
Iowa assists iVR (inaudible) beneficiaries. When people go maybe on the wait list through vocational rehabilitation, VR gives them our information as one of the ENs that they have access to and we can help by providing that job search, that resume', we can help them possibly get a job but they even get to VR services. We still refer back to VR if they need services beyond our help and maybe they've gotten off the wait list now and so what we do is we assign the ticket back to vocational rehabilitation. It's not a competition, it's what best for the individual.
As far as marketing strategies, it used to be when people got their ticket in the mail we had people coming in our door saying, social security told me that you can get me a job or that I'm entitled to a job or I can't get fired or anything like that. It was kind of nice when they came in because we could explain the rules to them and what the ticket really meant.
Over the years where they did mail out the tickets we had to resort to more marketing for people to come in the doors. We did posters, we have like large tv screens in our lobby so we put information on there and we still do. We did a lot of presentations around the state and it amazes me how many people, even though the ticket has been around so long, still don't know about it and have a lot of questions. And people at those presentations used to get teary-eyed and upset because they didn't know they could work and still maintain their benefits.
So we did have to resort to some marketing strategies and we still do a lot of those again because people don't know what's available.

Lee Ann: I'll talk about some of the changes within voc rehab now. One of them was that we developed here was to ensure beneficiary is provided with on-going benefit planning services once the person has a job. So the ibrf counselor acquaints them with an EN partner. We have 13 under the agreement. Staff is using a cheat sheet to make sure they inform a candidate about ongoing support and that's specific to the different statuses within the voc rehab system.
We also want to ensure that this happens so our VR data person sends out a tickler to every voc rehab counselor once their status change shows a candidate is working. Voc rehab provides informational materials to internal staff and external partners about ticket to work that can be found on our web site. Any of the materials we're willing to share with other states.
Prior to closure, Iowa VR staff help (inaudible) a phone call to introduce the job candidate to their EN of choice and make a connection with them for the person they will eventually be working with.
Finally, to help cement voc rehab's commitment to benefits planning, counselors are evaluated on their presentation of benefits so this is written into their performance evaluation.
I'm pretty sure everyone knows a ticket is put in use by VR when serving a SSI or di beneficiary. Of course assigning a ticket is not mandatory but it does allow an agency be reimbursed for expenses. VR has it written into our Partnership Plus agreements that the EN will unassign the ticket in order for VR to put it into use. Even though, you can see there's plenty of tickets to go around in Iowa and I imagine that's true in other states true. There are over 100,000 ticket holders here and I believe rob said there were 13.7 pirb beneficiaries in the u.s..
Right now voc rehab is serving 12,500 job candidates. Over 3,000 of whom are ticket holders. For Partnership Plus en working with voc rehab, VR takes the phase i milestones, which leaves phase ii and the outcomes available to the en partner. The most encouraging statistic i will share is this, over 40 percent of ticket holders want to work.
I want to acknowledge the 18 staff that VR has trained as benefit planners. That's more than 1 for every office within the state. And i'll share perspectives from two of these nrepbted staff. In 20143 Iowa state students got off benefits due to their teaching jobs and two more this year. Here are examples of 5 others able to leave the benefit system, a software engineer earning over $4100 a month, a landscape designer earning over $2100 a month. A youth benefits counselor earning 1900 a month, a production worker earning $2,253 a month. Lynette indicates she also works with individuals who want to continue with benefits. One is a cashier at wal-mart earning $700 a month. I have a good example of a past plan person whose goal would not be achievable. She's working part-time in school but won't be closed for some time due to getting an education. I write 2 to 3 pass plans per year but this is different to me because of the pass has made to her ability to progress. When i met her two years ago she had poor hygiene, struggled with completing classes and a history of losing jobs after a few weeks. Once she had the pass she was comfortable trying jobs knowing she had ssi to fall back on. She has maintained the same job ever since, almost 2 years. She's worked hard on managing hygiene and personal issues and made great progress with these.
While she continues to work on disability management and building personal strategies for success she's gaining work experience and earning credits to continue on to her grad school. The plan is for her to get a part-time job out of grad school and she'll still earn enough to go off benefits, gradually increase her hours until she's either working full-time or working as much as possible for her. Without the pass she may not have obtained her current part-time job which is key both in building work experience and her confidence in herself. She's been helpful for her to see she can achieve her current goal and move out of poverty.
Another benefit out of waterloo writes we are doing such a great service to the candidates we provide benefit planning to. There are times we may not have the answers. However it's come to the point we are able to feel comfortable with reaching out and contacting others who may be of assistance. Even though it's a lot of work it's really great our agency has decided to move forward by having benefit planners in each office.
Finally i want to acknowledge all the beneficiaries who are exploring options to go to work. I know it takes a lot of guts to even consider this. But individuals need to know that each VR agency should be ready willing and able to help. So thank you all very much. Next.

Leslie Barrett: Hi, Lee Ann, thank you so much, we're going to skip over resources and I want to be sure i leave everyone contact information. We had a really great question come in from the chat and we can certainly open up the lines for further questions. The question that came in on slide 10, Iowa's VR coordination was regarding the annual ticket holders exiting iVRs with a successful case closure. They want to know how many of those successful case closures were handed to VR networks.

Lee Ann: Within the last year 91 have been handed off of the 2200. Actually our numbers change and we're just, we really have just implemented staff handoff within the past year and a half so staff are slowly becoming adjusted to making handoffs and we have increased our EN pool so this allows a lot of client choice within our system. But of course we don't make an individual work with an EN unless they want to, either.

Michelle Laisure: Thank you, Lee Ann. Any other chat questions for our presenters? No? All right.Okay, a second question for you. Go ahead, James.

James Wackerbarth: What resource did you use to assist your staff in becoming certified or educated in becoming benefits planners for your clients?

Lee Ann: We use the technical assistance center available to us in 2013. We archived those webinars and we had two onsite visits from tac staff. We're exploring using bcu for ongoing support as well as possible we continue to want staff to be trained and updated in SSA initiatives.

Michelle Laisure: Operator, would you open the phone line for our callers?

Operator: Yes, ma'am, ladies and gentlemen, as a reminder to ask a question please press star 1 on your telephone key pad. Your first question is from the line of Gina Haupt

Gina Haupt: I'm sorry, I will actually withdraw because mine was about Partnership Plus.

Michelle Laisure: Hold on, we may come back, we'll open our lines for a few other questions on the ticket portal because i know the chat line is full of those questions. We do appreciate all of you writing your questions down because we will be sending those over to the VR help desk.
Operator, do we have another question for our Partnership Plus call? Noreen, do you have a question for our presenters?

Noreen Bracco: No, I just wanted to add my support. We just recently finished a recruitment here in Utah and since that time we have had 5 new submissions from employment networks for the Partnership Plus. It's really great, I want to encourage everyone to work closely with OSM, everyone came out and also Charlene, I'm a new ticket coordinator in the state of Utah so it was great help to get that off the ground for our state.

Michelle Laisure: Noreen, thank you for calling in and sharing your update. We appreciate that.

Noreen Bracco: You're welcome, bye-bye.

Michelle Laisure: Operator, I will take one more for the speakers then we'll go back to the ticket portal.

Operator: There are no questions at this time.

Michelle Laisure: Okay. Do you have any closing comments and we'll go back to the ticket portal.

Leslie Barrett: I do, thank you. I want to say a very full-hearted thank you to our 3 speakers today. It's been a real treat to work with you in Iowa and keep up the good work and thank you so much for being part of our call today, it was very helpful, helpful information for anyone looking to strengthen their partnership model.

Michelle Laisure: Thank you again to the Iowa team. The ticket portal, I know that we have received several questions on our chat line. It will be very helpful for us to address these questions and give our team time to go back, look at our ticket portal guide and address those questions with more detail. Again, we're going to open the phone line but at this time please keep in mind this is, many of these processes are in testing and we are working through many of the processes but we do want to hear what your questions are and your concerns so we can come next month with additional information.
Operator, we'll take 3 more questions and then we'll conclude our call for today.
Katie, are you still on the line?

Katie Striebinger: Yes, I am.

Gina Haupt: Hi, yeah, I just wanted to express my concerns, same concerns David had, I won't go too far with that, but a lot of it currently is move in but to have to manually go through and identify which ones they have to have the date changed, that concerns me, and also having CDR protection for the consumers concerns me because if I miss any they don't get their CDR protection.
Also I noticed in the presentation, and you guys didn't touch on it, there are going to be, the leading (inaudible)s going to be taken off. Also I believe it's the code zero being added that will also be a programming change that's going to have to get added in and since we've programmed our own state management system I'm going to need to sort of know a little more about that to state to them and how that's going to talk back and forth with our system. I couldn't hear what code you said, I know you said txt is not going to be there, but what are we to change the ending to?

Katie Striebinger: Hi, this is Katie. So the file extension of the file that you upload needs to end in vsv it's one of the choices, you have a save as and you can save it. If you are already producing them as text files you can just change the file name to a different extension. I have my email address out there, I am here to work with you and help you, my little team here and we will get you working with the changes and get you all the changes you need to make to your programming. Contact me and I will help you.

Gina Haupt: And can you put your address on the chat line? You sort of went with it fast.

Katie Striebinger: Yes, we'll repost that on the chat line. We'll go ahead and send out just the email by email too because i know not everyone on our call today is on the chat line so we want to make that available to everyone.
Gina, you gave me a list of about 4 items. Do you want to submit your questions so we can filter them, make sure we are capturing the concerns.

Gina Haupt: They are already submitted. okay, great. Thank you.

Operator: At this time there are no further questions.

Michelle Laisure: Oh, all right. Okay, so I know there are questions out there, we see the questions -- actually James does have a question he wants to share. James.

James Wackerbarth: This is from Donna Osborn, where is the earnings information on the portal come from?

Katie Striebinger: Social Security's earnings records.

Michelle Laisure: Okay, do we have another question? No? Okay, any closing remarks from our speakers from social security administration? I think you're on mute. Just want to double check, regina or katie, any closing remarks.

Regina Bowden: I wanted to thank everyone for joining the call today. We are commencing to have a quarterly EN payment call. Nate Arnold, I don't know if he's still on the call -- I'm sorry, it's VR, VR payment calls, similar to the EN payment calls. On those calls we'll be able to address payment concerns and questions and go into more detail and address specifics. So i know that some of the questions that they have today maybe were not (inaudible) call but as you said they can send in the questions and our help desk will provide an answer and we will address all of their concerns. So thank you again for joining us today.

Michelle Laisure: Thank you, Regina I do want to mention for those 14 state agencies that access the EN, our quarterly call is scheduled for Wednesday, July 29, at 3:00 so we will be covering those issues related to VR ENs. We will send out an agenda and announcement later this week or early next week but I wanted to (inaudible) we will do a follow-up to many of the comments and questions we received today on the august call. Thank you for joining us and that concludes our call for today. Have a good day, everyone. Thank you.