

The following questions were received during or after the July and August All State Vocational Rehabilitation Agency Calls.

1. **Question:** When denying a claim due to less than nine months of Substantial Gainful Activity (SGA), can the Social Security Administration (SSA) please provide which months or how many months did not meet SGA? Example: Quarterly wage data shows earnings of \$5,800.00 in a quarter. SSA states that this client did not earn SGA in any month during that quarter. This is mathematically impossible. By not providing this information to us, it leaves us at a disadvantage for claim resubmittal and possibly filing untimely.

Answer: SSA gives priority to monthly-verified earnings when available. We use quarterly earnings as an expedient. In instances where the SSA has monthly earnings adjusted for work incentives, we must use it. The adjusted monthly earnings may be less than the quarterly earnings and may take each month below the required earnings threshold.

2. **Question:** Recently SSA told one of the State VR agencies that if the beneficiary had not filed taxes with the IRS on the reported wages for a submitted Cost Reimbursement (CR) claim, then the claim would not be paid and they could not use those wages regardless of whether the employer reported the wages to the state. This is the first we have heard of this and does not take into consideration things like self-employment or IRS filing extensions. What will the protocol be for resolving this issue from the VR standpoint? Will this be a new type of denial?

Answer: This is only an issue when there is a discrepancy in our records concerning the alleged earnings. If there is a question about whether money reported in the state's records are earnings, SSA will verify that the money is earnings and not a pension or some other type of compensation before making a payment. If the money is from work, the beneficiary will eventually report it to the IRS.

3. **Question:** State VR agencies are not allowed split payments when they are serving a client under either TTW payments or CR payments and the Ticket is being held by a regular EN. Regular ENs are given the opportunity to split payments with other regular ENs. Why are State VR agencies not allowed to split payments?

Answer: The EN and State VR agency are allowed to split payments under an agreement. OSM can provide an example of such an agreement.

4. **Question:** Is there any way to provide the name of the state in which the beneficiary's earnings occurred? This would allow us to work with that other state to provide documentation and justification for a claim.

Answer: No, SSA cannot currently provide substantive earnings leads such as the state in which the beneficiary had earnings.

5. When the Interactive Voice Response System (IVR) was discontinued June 30, 2015, California Department of Rehabilitation (DOR) field staff was instructed to utilize the Beneficiary Assistance and Support Services (BASS) line with the consumer present in order to verify Ticket status. Since following this process, our field staff have encountered many issues including:

- Experiencing very long wait times (45 minutes or more)
- Counselors are reporting negative customer service experiences with the BASS line staff including staff that are talking too quickly, providing confusing and incorrect information to the counselor and the consumer, not checking to see if the Ticket is assignable as requested
- Consumers are not always available to call the BASS line with the counselor or support staff
- Phones are not consistently available in DOR meeting rooms

These issues are concerning because they affect DOR's ability to support the Partnership Plus Service Delivery model when it is so cumbersome to verify a consumer's ticket status. This will also affect our eligibility for Cost Reimbursement in some cases when a consumer's ticket is assigned to an Employment Network (EN) but the field staff are unable to verify this.

Questions:

1. Are other SVRAs experiencing similar challenges with the BASS line? How have they handled these challenges?
2. What is the process for reinstating or replacing the IVR line?
3. How does SSA plan to improve the BASS line?

Answer: We are sorry to hear of the long wait time you experienced. We have referred your concern about the Ticket Help Line to the appropriate area in ORDES, and will let you know when they respond. If you are not using the portal to check assignability, you may include clients with ticket availability unknown on your case opening data file and learn from the response file whether the individuals have tickets available for assignment. In addition, the manual process for checking ticket assignability is to contact OSM.

6. **Question:** The portal is designed with ENs in mind that have minimal amount of Tickets assigned to them. When VR agencies want to look at Tickets currently assigned or previously assigned, we have to convert the lists into Excel spreadsheets and print them out because there are over

1000 names and the system cannot handle listing all those individuals on the screens. Once we print out these lists, there is no easy way to find any individual using the specific SSN. There is only the option to look for them by name and when you have 200 people with the same last name, you are wasting a lot of time looking for one individual. Is there a way to be able to look individuals up by typing in the SSN?

Answer: Actually, the portal was designed with high volume VR agencies in mind as well. The limitation on how much data you can view at a time and the inability to look up information by SSN is intentional for security reasons. The portal is EN/VR business centric and includes the very minimal beneficiary information, especially PII like SSNs. You can search the “List of Beneficiaries Currently Assigned to Me” by name and ticket assignment date to distinguish beneficiaries who have the same last name.

- 7. Question:** Wants to discuss TTWP website and letters that go out to ticket holders because they are written in a way the ticket holder cannot comprehend and they misunderstand the meaning. The VR gets a lot of calls from the VR field offices with complaints from ticket holders. As for the TTWP website, the map of the US is no longer there. The Choosework website is difficult to follow and it is not user friendly for Ticket Holders. The map was the better visual tool for ticket holders to understand and the selections for type of service provider and services were right there instead of having to select the options and "Update Results". VR is spending a lot of time walking Ticket Holders through the website.

Answer: We have referred your concern about the notices and website to the appropriate area in ORDES. However, SSA has plenty of experience with beneficiary notices and have standards and processes to ensure that they are in plain language. If specific wording on a particular notice is problematic, please share that particular notice language with us.

If you have questions about anything included in this technical bulletin, contact the Social Security Administration’s VR Helpdesk at vr.helpdesk@ssa.gov.