**All State Vocational Rehabilitation (VR) Call**

**3 – 4 p.m. EST**

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Operator: Ladies and gentlemen, thank you for standing by and welcome   
to the national state rehabilitation call. During the presentation all 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 the 1 followed by the 4 on your   
telephone. If you need to reach an operator at any time,   
please press star zero. As a reminder, this call is being   
recorded Tuesday, February 10, 2015. I would now like to turn   
the conference over to Nate Arnold.

Nate Arnold: Thank you, operator. Thank you for taking time out of your day to join us today. I know the agenda doesn't look like it has a lot of items on it, but as usual there will be a lot of information to convey and I know you will probably have a number of questions for us and that is one of the primary purposes of the call, is for us to be able to answer anything that's getting in your way or bothering you at this point.

I'm going to go ahead and do the Cost Reimbursement piece first, then we'll talk Portal readiness after that. Just in way of an update on Cost Reimbursement, last month we paid out a little over 10 million in claims, brings up to about 39.8 for the year. I think we're probably about 8 million ahead of where we were last year at this time, which is good. We still have plenty   
of work here. We just earlier I guess the end of last week we   
finished work in September claims. We are now working claims that came in here in October so that should give you a pretty good idea of whether or not you should have heard on stuff. If you have cases that are certainly pre-accept or September, feel free to contact us to determine the status or make sure that they haven't  gotten lost or anything.

Also I think on last month's call I mentioned to you the fact we have an OIG audit of the VR Cost Reimbursement program that's underway. 38 VR agencies, I believe, had claims that got picked for the sample they are doing and we did send  memorandums out to everybody asking them to send us material for those. I want to thank those of you who have already sent them in. Those of you that are still working on it,   
please hurry. Otherwise you are going to have to send me   
get well packages in prison or something. So take that to   
heart. That's really it for the Cost Reimbursement piece at   
this point. I'm going to ask Katie Striebinger to talk a little bit about the portal, then we'll be prepared to take questions on anything like that that you have questions on. All right, Katie.

Katie Striebinger: Hi, good afternoon, everyone. I'm going to give you a little reminder about portal readiness and hope you are getting   
everything set up that you need to in order to use the portal   
and once you have everything set up you just need to contact   
the VR help desk, what is a good time to contact you and a   
good email and they will call you back on the phone and coordinate with you to get the information we need in the   
system. And we hope you are all taking steps towards that.

I really don't have a lot more than that. We've been saying it, the same information on the call so I think I'm just going to leave it to questions if you have any questions about preparedness I will be happy to answer them or any questions about the portal in general. So I'm just keeping my piece short and sweet.

Nate Arnold: Thank you Katie. Michelle, did you say there are already   
questions about the Portal on the chat line?

Michelle Laisure: Yes Nate, we do have a few. Do you want to take those   
now?

Nate Arnold: Sure, we can take those before opening it up for call-in questions.

Michelle Laisure: Eugenia wants to know when will the new Portal will open for testing or has the testing started yet.

Katie Striebinger: That's a good question. We are about to kick off phase ii of the pilot. If you've been selected for phase ii, you should be getting an email this week letting you know about this and when you can join, so expect to see that soon and the portal itself we expect to go live the end of March, early April.

Michelle Laisure: Okay, the next question has to do with a manual or document   
of instructions for the new portal.

Katie Striebinger: I think that's something that maybe SSA and OSM can discuss and see if we're going to put together that package for them.

Michelle Laisure: Training documents.

Katie Striebinger: Yeah, we can, hopefully by the time we do the minutes for the call maybe we'll be able to address that, Ana.

Nate Arnold: Do we have any other questions?

Operator: If you have to ask a question, please press the 1 followed by the 4. We have a question from the line of David Leon, please go ahead.

David Leon: Hello, everyone. My question involves I received an email that my Suitability clearance was approved and does that mean it is now time for that next step of contacting folks to begin working towards access in the portal, or am I waiting to get something in the mail with further instructions?

Natalie Sendldorfer: Yes, you are ready to register in the my SSA account, David. This is Natalie.

David Leon: I've already got the my ssa.gov, this is a separate step?

Natalie Sendldorfer: Yes, you will be emailing the VR help desk your user id and they can help get you set up.

David Leon: The user id for my SSA - okay, I may email you separately to make sure you do that right. I've got the commissioner's office waiting for something in the mail that clearly is not coming.

Natalie Sendldorfer: Okay.

Katie Striebinger: This is Katie, I just want to chime in. Please don't send us the user name in the email because that's your private SSA account. We just need you to send an email to let us know a   
good time to contact you to get your EN and user name. Those   
are the two pieces you need, you need your suitability and your my ssa.gov account with access security.

Michelle Laisure: Operator, do we have any other questions?

Operator: We have a question from the line of Carla Bell. Please go   
ahead.

Carla Bell: Hi, good afternoon. My name is Carla Bell, I'm the   
manager of Social Security programs section at Department   
of Rehabilitation California. I had a 4-part question about the Interactive Voice Response system.

I just wanted to confirm if Social Security plans on continuing the Interactive Voice Response system as part of the new provider portal and then if retained, will you be requiring successful completion of Social Security Suitability process for service provider representatives using the IVR system? And then also in the current IVR system, right now only the duns and the pin number is required for access. If Suitability is required how will you determine Suitability for a representative? And finally will the new provider portal offer the IVR system --   
excuse me, will the new provider portal offer \*r offer all the date functions such as the assignment date and use date that is currently in the IVR system? Thank you.

Nate Arnold: Very comprehensive question Carla. Katie, do you have all that?

Katie Striebinger: I can answer the last piece. I can answer what's available in the portal. The functionality that's available in the IVR will be available in the portal , but it will not be IVR.

Carla Bell: Okay.

Katie Striebinger: You will have to be a portal user then you can go in and check any SSN and user status and see if they are assignable.

Carla Bell: Will it provide termination date, assignment date and the   
end use date that we get now with the IVR system?

Katie Striebinger: If the Ticket is not in use with you then you can only give you the reasons the ticket is assignable or not assignable. That's the issue right now. with online portal, currently the online portal doesn't provide that termination and assignment date and the in use date and we can get that in our, staff uses that all the   
time getting the information from the IVR system, the phone   
line. We use that for our cost reimbursement processing,   
checking Ticket status, things like that.

Natalie Sendldorfer: If you are checking to see if a Ticket is basically assignable it will tell you (inaudible) right now you'll be able to figure out using the SSN and the date and you'll be able to figure out if it's assignable or not and the reason why not, but if a ticket   
is actually in use or assigned to you are not going to know that information because that's not available.

Carla Bell: So the new provider portal will be provide that information. Is that what you're saying?

Cara Caplan: Not like the IVR, you are not going to get the current IVR functionality, no.

Carla Bell: So if that's the case, is it, have you confirmed or not, does Social Security plan to continue the Interactive Voice Response system?

Cara Caplan: Yes.

Carla Bell: In conjunction with the new   
provider portal?

Cara Caplan: I know we're working on it, but it is not our primary focus   
right now. Our primary focus is switching from one portal to   
the next.

Carla Bell: When will you know? 

Cara Caplan: I can't give you a date. We can probably reply in the   
minutes. 

Carla Bell: Can you repeat the last thing? I missed it. 

Nate Arnold: We will try and address that when we send the minutes   
to the call out. We'll take it as a question.

Carla Bell: Okay, thank you, Nate.

Michelle Laisure: That is all the questions at this time.

Nate Arnold: I know you are probably all looking for guidance from me on   
these portal-related questions. I want you to know that since   
I probably still use like a tr80 computer, they don't let me anywhere near technology. I have to defer to   
my experts on that.

If there are no further questions at this point, is there anything else on the chat line, Ana or Michelle?

Ana Morales: Virginia is asking how can she ask a question on the   
phone, so operator can you repeat the instructions, please.

Operator: To ask a question, please press the 1 followed by the 4.   
once again, that's a 1 followed by the 4 to ask a question.   
we have a question from Eugenia Cox, please go ahead.

Eugenia Cox: Hi, it's Eugenia, sorry, I didn't hear the instructions very well. Welcome, Carla, I know you are new there to California VR. This question came up, the question about access from your field staff came up on a previous call. And it was determined that the access they would have had is going to be gone now and the information that they were able to access was not going to be available, which is kind of disturbing to me, i would think   
that one source of information should be transported to the   
different source of information so people could get the same   
access to the same information that they had before.

But my question, what was determined on the previous cause was you can have two people from each location in a state apply for suitability through SSA, which is what my understanding was. Is that correct, Nate?

Nate Arnold: I didn't think we put a limit on it. I thought we had recommended that you have at least two.

Eugenia Cox: Yeah, it was two per location, so I believe what they had recommended was that if you had, you know, 50-some offices and you had two people in each office that could pass the suitability they would be able to have access to the   
portal. I think that's what we had come to an agreement on.   
if we were only limited to two people per location.

Natalie Sendldorfer: Eugenia, this is Natalie. You can have as many as you   
like. You can just fax in an application for additional   
suitability.

Eugenia Cox: We are doing two and two. We need to have the same access   
to the information because going through suitability is so   
horrible, I'm sorry to say that, Natalie, but it is. It's a long drawn-out process. I just got cleared and so it's a long drawn-out process and for California to have to do that with so many locations to be able to access it, but would it be worth it to them if they can't get the same information they were getting when they used to be able to call in?

So, again, the same information, the new portal needs to be a one-stop shop. It needs to have everything that we were able to get before or it's really not going to be worth, you know, going through the process of Suitability to be able to get access to it and that to me would be very frustrating if I were in California's shoes. We don't currently have any field staff that call into it other than ourselves or our benefits planners.

So again we need to possibly look into the fact that we need   
to be able to get the same information out of the portal.

And my other question with regards to the portal is we  volunteered to be one of the test states, but I don't know   
that we were ever approved so I don't know if to look for   
something coming up, do you have a list of that?

Nate Arnold: Yes, you will definitely be in the pilot.

Eugenia Cox: And then one last question. I have several calls in to you   
guys there in Baltimore and I haven't heard back from   
anybody. One of them was that there were two State VR agencies and I haven't heard anything about that. The other one was on an overpayment for Ticket to Work and I haven't heard   
anything about that either.

Nate Arnold: Who are you trying to reach at Social Security, are you trying to reach a specific person?

Eugenia Cox: Yeah, I'm trying to reach you guys. It was weird because I sent an email to you, Nate, saying the overpayment notice went to two of our field office managers and I have no idea how   
it got sent to them. So I'm not sure where the contact   
information is going. I just got a bunch of scratching heads   
going why is this coming to me, this should have gone to you.

Nate Arnold: Yeah, I saw that. I actually saw your email about those. I'm pleased to tell you, I don't have to get too involved in the Ticket   
overpayment things. I assume you will be hearing from   
somebody very quickly from the other side of the house on   
that, but I will follow-up on that after the call to make   
sure. It's definitely here, I saw that email.

Eugenia Cox: Yeah, and I don't know that anybody got those emails   
because nobody ever says, okay, I'll look into that or something like that, so I don't know if people are actually seeing what I'm sending. And since there is like no hotline number you can call, it's just by email, I don't know where I'm at on all this stuff and   
whether I've done what I'm supposed to do.

Nate Arnold: I'll make sure somebody answers you about those ticket   
overpayment things. The one about multiple states, I haven't seen anything on that. Was that an EN help desk inquiry or VR help desk?

Eugenia Cox: VR, yeah, I got a call and I don't remember who it came from, but I got a call saying that there was a dispute on a claim and I faxed over the claim itself and I haven't heard anything else back on that.

Nate Arnold: How long ago was that?

Eugenia Cox: Maybe a week and a half ago.

Nate Arnold: Well, I don't want to burden all the national listeners with this   
case-related stuff.

Eugenia Cox: Yeah, mine was just a matter of is there a way we can   
get a quicker response.

Natalie Sendldorfer: And Eugenia, this is Natalie. As far as the overpayment, there is a number you can call. I will email it to you.

Operator: From the line of Mike Hermanson, go ahead.

Mike Hermanson: This is Mike Hermanson in Montana and I'm following up on   
David's question because I was a little confused. I got, my   
supervisor got my approval for the clearance and I did go into   
my personal Social Security and applied for higher security and   
I got one letter back saying that, you know, they were glad   
I had applied for that. Then I haven't got anything else back. Now, was the response to David I have to contact Natalie to get the security code for my personal, for the personal social security thing to get more clearance? Because I thought we were going to get another letter.

Cara Caplan: Did you register in my SSA, do you have an account with my   
SSA?

Mike Hermanson: Yes, and I asked for more security and I got a letter   
back saying they were glad I asked for more security and I'd   
be getting a code in the mail and I never got a code in the mail. And then when I heard the conversation with David it sounded like I have to contact you guys to get the code.

Katie Striebinger: This is Katie, I can jump in. We had someone else have this problem. How long has it been since you requested the code?

Mike Hermanson: Oh, it's been a month, month and a half. It was just before the last phone call I suppose.

Katie Striebinger: Okay, yeah, it can take up to 10 business days but if it's been more than 10 business days you can go back into your myssa.gov account, go to that tab for extra security and you can request them to send you another code and they will send   
you another letter with another code. And when you get that   
letter and you take that code and go back in you should have   
extra security.

Mike Hermanson: Okay. The letter I did get didn't have a code in it.

Katie Striebinger: You are missing that letter. You definitely need a letter with a code so you can establish extra security. Until you take that code they send you in the mail and go in and put that code in, you don't really have extra security yet because you haven't confirmed you are you because you got the letter in the mail so you definitely need that letter. I would suggest going in and  requesting it again. You will need to do that.

Mike Hermanson: Okay. And then I should hear something within 10 days.

Katie Striebinger: Yes, you should definitely get a letter within 10 business   
days.

Mike Hermanson: Thank you. That helps at least know what the response   
time is.

Katie Striebinger: Those are really the two pieces, getting your Suitability clearance, which Natalie is coordinating, then   
going into my ssa.gov, creating a my ssa.gov account, getting   
the letter, once you have those two pieces contacting the help   
desk and let them know you are ready to give them the   
information over the phone.

Mike Hermanson: I had to go back into my Social Security doing some other stuff I was doing and the first thing that popped up was to put in the code you received but I haven't received a code, or bypass it. So I know it's set up, I just haven't got the code.

Katie Striebinger: Well if you have any problems doing it, requesting it again, why don't you try that first and if you have any problems I would say I don't need -- Natalie what are we using as our help desk, are we using the VR operations system?

Natalie Sendldorfer: Yeah.

Mike Hermanson: I got Natalie's email and phone number.

Natalie Sendldorfer: You can tact me if you have any questions, I'll be   
happy to help you, Mike.

Mike Hermanson: Thank you.

Operator: Our next question is from the line of Donna Osburn. Please go ahead.

Donna Osburn: Hi, this is Donna from Kentucky. I was wondering about the new portal. In the current one we're able to download an excel document to check ticket assignability in batches. Are we going to be able to do that in the new one?

Katie Striebinger: Yes.

Donna Osburn: Great, great. Also wondered, I've got several people that are trying to get Suitability. Well, we've all got Suitability clearance but I don't know where we are as far as the my SSA accounts are concerned. Is there a way for me to find out who has gone   
through that or am I going to have to check with each individual person?

Katie Striebinger: We really can't share information with you about other people's personal accounts so you're going to have to ask them. Once they get that extra security set up, they need to email the VR help desk to follow through with that.

Operator: Our next question is from the line of Bill Martin. Please go head.

Bill Martin: Hi, this is just in follow-up with Montana's question about getting the code in the mail. Does that, we're going to have having a change of address, business address. does that come to a business address or personal?

Nate Arnold: Bill, judging by the stunned looks on people's faces   
--.

Bill Martin: I noticed the silence there.

Nate Arnold: We're going to have to get an answer for you on that one. If it was going to your office I would assume, even if you moved, they would have a forwarding process.

Bill Martin: I would hope, yeah.

Nate Arnold: We will get an answer and let you know directly.

Bill Martin: Okay, and then once I get the code then I contact Natalie.

Operator: We have a follow-up question from the line of Carla Bell. Please go ahead.

Carla Bell: Hi, question, this is a question for Nate. I had sent you questions about the Interactive Voice Response back in January and since I'm new and I wanted to make sure you are getting my emails because I haven't gotten a response.

Nate Arnold: I got those and I have forwarded them to the people that handle them. If you hadn't heard, feel free to bug me and I will track them down. The portal and suitability are not things I handle myself but other staff members do. I don't mind getting the   
inquiries and I’ll be glad to follow-up on them for you.

Carla Bell: Okay, good, because I have not heard anything about the   
IVR questions and we really need some answers about that   
because we depend both on field staff and our section really   
depends on that IVR system information it provides and at this point it sounds like that new provider portal might not be providing the information that we get from the IVR and then also we need to plan if the IVR system goes away we're looking at hundreds of staff that use that to verify ticket status of almost 2,000 consumers monthly.

Nate Arnold: I can assure you it is not our intent to take information off the table. And again this is not something I work on directly, but first forward me the emails you're talking about again and I will make sure that somebody gets back to you on it.   
But, two, feel free to illustrate as clearly as you can any information access that you are concerned about losing and we will either take that into consideration or tell you why it is not being added to the portal capability, okay?

Carla Bell: Okay, that would be great.

Nate Arnold: I don't know at this point whether it's a work here issue or I'm sure if they are taking reducing access there's got to be a reason for it. I know you guys would understand if we explained it to you.

Carla Bell: Yeah, and we haven't gotten any real explanation to date and we need to be able to communicate that to our directors, our executors and our field as well.

Nate Arnold: Seems reasonable to me.

Carla Bell: Thank you so much Nate, I really appreciate it.

Operator: We have a follow-up question from the line of David Leon please go ahead.

David Leon: I didn't ask earlier because I didn't know if it was going to be an issue, but for the audit from the office of inspector general, it just so happens that the cases I've got are cases we closed far enough in the past that I can't get access to many of the records, they have been destroyed. I'm   
going to send what little I have access to, but we'd be   
happy to send them other cases.

Nate Arnold: At this point, I'll tell you, I think what you should do, David, is literally just explain what your folder retention criteria is, how you followed it. My impression was that all of the claims that   
they selected were payments that were made like in fiscal year 13 or 14. So from our standpoint, I mean that's stuff that obviously we keep as much as we can here. I'm surprised you guys would get rid of stuff where the payment or the decision had been made on it yet.

David Leon: Well, again, we may have gotten paid in the last year but the case may have been closed 6 years ago. So there's some records that we still have in the electronic file but the actual physical copies of bills and receipts with the stamps, that's not what we keep. So, again, I'm going to send what we can.

Nate Arnold: I'm going to, obviously do the best you can, explain it clearly, but it would seem to me that since a case can get picked for PVR obviously until it's paid I would think you'd hang on to receipts   
particularly for some period of time after that.

David Leon: It was a surprise to me to find out that our fiscal department destroys records after 3 years. And I think we will address it going forward for our SSA cases.

Nate Arnold: I'm sure if we find that there's a number of cases where the documentation is not there, just knowing how the IG's work I would think that would be a recommendation that comes out   
of their audit that states extend periods of record retention or something. But just literally explain what your, you know, what the individual case situation is and what your guidelines are   
and give us whatever you can.

David Leon: Okay.

Eugenia Cox:  This is Eugenia, I wanted to respond to David. Nate, you   
said you were surprised we would get rid of cases that   
hadn't been paid, these are all cases that have been paid.   
these are all PVRs.

David Leon: I understand but these are all cases that have been paid within the last year.

Eugenia Cox: Every year we have files that are destroyed. Every year   
they come up for destruction.

David Leon: Again, I know you guys have your record retention criteria and what not just like we do. So as long as you are following yours then you are fine and that's okay.

If the IG has a problem   
with that they will write it up   
in their finding.   
  
>> a lot of us have access to   
things like, we have case   
management systems so we are   
able to pull up copies of the   
plans, we are able to pull up,   
you know, more information as   
far as the payments and   
authorizations, we just don't   
have the hard copies that have   
signed signatures and we could   
even get, we could even request   
to get warrant, you know,   
canceled checks and things like   
that. We just don't in a lot   
of cases the actual hard copy   
file may be gone that has the   
original signatures, the   
original reports and things   
like that, but there are some   
states that are also going   
paperless and they are scanning   
information and you just hope   
that they have scanned   
everything that they needed to   
scan. All of us are in a   
different boat.   
  
>> i have a pretty good sense   
of that and i understand what   
you are up against. I   
apologize for having to ask you   
guys to put that kind of stuff   
together because, you know,   
it's above and beyond the call   
of duty. But again as long as   
you are following your   
guidelines, that's fine.   
  
>> yeah, we know it's not   
coming from you. We know it's   
coming from somebody other than   
you.   
  
>> some big meanie other than   
me.   
  
>> yes, some big meanie other   
than you.

Operator: There are no other questions at this time.

Nate Arnold: Thank you. Michelle, Ana, good folks at awesome, do you   
have anything you want to add?

Michelle Laisure: No, not at this time, you have handled all of them very well.   
thank you Nate and Katie and Natalie.

Nate Arnold: Thanks to everybody who dialed in. Thanks for all you do all the time. Trying to keep this boat running in the right direction. We'll try to get an agenda out to you for next month, hopefully with a   
little bit more lead time. things have been a little crazy out here but have a good month until we talk again. Take care, everybody.

Operator: Ladies and gentlemen, that concludes the conference call   
for today. We thank you for your participation and ask that   
you please disconnect your line.   
  
[Call Ended]