

## Welcome and SSA Updates

### Rob Pfaff (SSA)

Robert Pfaff welcomed everyone to the call and provided the following updates:

#### Social Security leadership changes

On January 20, Social Security Commissioner Andrew Saul announced the departure of Mark Warshawsky as Deputy Commissioner of the Office of Retirement and Disability Policy (ORDP).

Commissioner Saul also announced Kilolo Kijakazi as the new Deputy Commissioner of ORDP. Kilolo, who holds a doctorate in Public Policy from George Washington University, comes to SSA with a wealth of policy experience and specialized knowledge in economic security, social insurance policy and retirement policy.

#### TPM contract status

Social Security is working to finalize the Ticket Program Manager (TPM) contract award and hopes to make an announcement soon.

#### Employment Summit

Social Security is discussing plans for another Employment Summit. The Summit would focus more on developing relationships with employers to connect Ticketholders to jobs. Rob invited ideas from Ticket Program service providers on ways to connect and partner with employer groups.

## My Social Security Accounts

### Diandra Taylor (SSA)

Laura York introduced Diandra Taylor from Social Security's Office of Communications. Laura announced that Diandra would provide an overview about *my* Social Security Accounts; however, Diandra is not a resource for technical questions. Call (800) 772-1213 for assistance with *my* Social Security Accounts.

Diandra covered the following topics:

- How to open a *my* Social Security Account
- Services offered through *my* Social Security Accounts:
  - For those who receive Social Security benefits or have Medicare
  - For those who do not receive Social Security benefits
- New enhancements:

- Retirement Benefits Portal
- Updated Standardized Benefit Verification Online
- New Fact Sheets added to online statements
- Enhanced security features
- Information for people helping others can be found at <https://www.ssa.gov/thirdparty/>

Presentation slides offer more details about *my* SSA Account topics.

## Work Incentives Counseling

### Terri Uttermohlen (SSA)

Terri explained that Work Incentives Counseling, also called Benefits Counseling, offers accurate and comprehensive information to beneficiaries about federal, state, and local programs geared towards their employment goals and employment support needs. She provided the following information:

- Work Incentives Planning and Assistance (WIPA) is the program that Social Security funds to provide benefits counseling nationally.
- Community Work Incentives Coordinators (CWIC) provide direct work incentives counseling to beneficiaries under the WIPA program.
- Funding is limited, and the need is great, so SSA encourages Employment Networks (EN) to build service capacity.

### Virginia Commonwealth University (VCU) Work Incentives Training

ENs are encouraged to attend initial training and achieve and retain certification as a Community Partner Work Incentives Counselor (CPWIC). You can read more information about the [CWIC and Community Partner Initial Training](https://vcu-ntdc.org/training/initial/initial.cfm) on the VCU NTDC website (<https://vcu-ntdc.org/training/initial/initial.cfm>). Additional information includes:

- The CPWIC initial training course is free and designed for 40 hours of face-to-face instruction.
- The course is now adapted to a Zoom platform due to COVID-19.
- CPWICs are expected to provide individualized work incentives counseling to Social Security beneficiaries at least 16 hours per week.
- Social Security prioritizes registrants who will provide services as CWICs under the WIPA program.
- The next highest priority are registrants who work for an EN.

- Once fully certified, CWICs and CPWICs must complete continuing education to retain certification.
- NOTE: Prior to registering for the initial training, community partners must complete the Introductory Web Course: Introduction to Social Security Disability Benefits, Work Incentives, and Employment Support Programs Web Course (<https://vcu-ntdc.org/training/introductory/introindex.cfm>).

### **WIPA Grant Solicitation**

On February 19, Social Security released a Request For Application (RFA) for WIPA grants on the Grants.GOV website. ENs and State Vocational Rehabilitation (VR) agencies are encouraged to read the announcement and consider applying to become a WIPA project if qualified. Please note:

- The application period closes on April 19, 2021, and awardees will provide services beginning July 1, 2021.
- Find the application at: <https://www.grants.gov/web/grants/search-grants.html?keywords=WIPA>.
- SSA will post dates and times for upcoming calls, announcements and frequently asked questions to <https://www.ssa.gov/work/WIPA.html>.
- If you have questions about the WIPA RFA, please send them to [SSA\\_TA@grantreview.org](mailto:SSA_TA@grantreview.org).

Presentation slides offer additional details about Work Incentives Counseling topics.

## **EN updates and reminders**

### **Cara Caplan (SSA)**

#### **Annual Performance Outcomes Report (APOR)**

ENs must submit the APOR by Friday, February 26. Excluded are State VR agencies, American Job Centers (AJCs) and ENs with 2020 or 2021 agreement award dates. Failure to complete the APOR on time will constitute a violation of the EN TPA and could affect an EN's ability to assign Tickets, receive payments, or result in contract termination.

Find APOR related resources at: [yourtickettowork.ssa.gov/resources/resource-documents.html](https://yourtickettowork.ssa.gov/resources/resource-documents.html).

For help, contact [SSAENAPOR@yourtickettowork.ssa.gov](mailto:SSAENAPOR@yourtickettowork.ssa.gov) and use the subject line "APOR Assistance – Your DUNS Number."

### **Security Awareness forms**

All ENs must submit the Security Awareness Training (SSA-222) form or Addendum by Friday, February 26, to [SecurityAwarenessTraining222@yourtickettowork.ssa.gov](mailto:SecurityAwarenessTraining222@yourtickettowork.ssa.gov). ENs with multiple staff must keep signed copies of the SSA-222 forms on file at the EN location. The Signatory Authority or Suitability Contact must submit the Addendum form that lists all staff who have completed the form. ENs run by a single person must submit the Security Awareness Training form SSA-222; the Addendum is not required.

### **Portal access employment verification**

Portal users must verify their employment every 6 months to maintain Portal access. Users receive a notification approximately 2 weeks prior to their Portal account being locked. To verify employment, send an email to [ENService@ssa.gov](mailto:ENService@ssa.gov) with the subject line "Employment Verification – Your DUNS Number." Use one of the options below:

- Option 1: Single user can send an email from a company email address stating they are still employed.
- Option 2: EN can send one email listing all active employees with Portal access.

Contact [ENService@ssa.gov](mailto:ENService@ssa.gov) for assistance.

### **Report changes in EN operations**

ENs must inform Social Security of any operational changes that prevent them from receiving and responding timely to requests such as illness, retirement, or reduced services due to COVID-19 restrictions. Report changes to [ENService@ssa.gov](mailto:ENService@ssa.gov).

### **Postal delays and my Social Security (mySSA) Accounts**

Due to the pandemic, nationwide delays are impacting timely receipt of mySSA account upgrade codes via U.S. mail.

## **Outreach update**

### **Jayne Pendergraft (TPM)**

#### **Ticket to Work Success Stories**

The newest success story revisits Rob. At one time, Rob received Social Security disability benefits. Rob is now employed full-time and financially independent. Twenty years after a life-threatening illness, Rob is working toward a legacy his family can enjoy for generations. Catch up with his story at [choosework.ssa.gov/library/rob-success-story](https://choosework.ssa.gov/library/rob-success-story)

ENs can submit information about Success Story and Stepping Stone Story candidates that meet the following criteria:

- Success Stories feature individuals who achieve financial independence with the help of the Ticket Program.
- Stepping Stone Stories feature individuals who are on the path to financial independence but have not yet eliminated their reliance on benefits.

Send candidates for Stepping Stone and Success Stories to [Stories@choosework.ssa.gov](mailto:Stories@choosework.ssa.gov).

### Fact Sheets

Ticket to Work fact sheets provide useful information about the program and other Work Incentives. Recent fact sheets include:

- New: Medicaid and Medicare Employment Supports
  - <https://choosework.ssa.gov/library/fact-sheet-medicare-and-medicaid-employment-supports>
- Updated: Trial Work Period
  - <https://choosework.ssa.gov/library/fact-sheet-medicare-and-medicaid-employment-supports>

### February Work Incentive Seminar Event (WISE) Webinar

Information about the next WISE webinar:

- Topic: Expanding Your Job Search with Ticket to Work
- Date: Wednesday, February 24, 3:00-4:30 p.m. ET
- Presenter: Ray Cebula, Cornell University
- Register at [choosework.ssa.gov/wise](https://choosework.ssa.gov/wise)
- View previous webinars at WISE On Demand:  
<https://choosework.ssa.gov/webinars-tutorials/webinar-archives/index.html>

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## Questions/answers

A question and answer period followed, which is part of the call recording and transcript.

**Note:** Several participants asked questions related to the Work Incentives counseling topics after the presenters had left the call. Following are some clarifications related to the questions:

- For Work Incentives questions related to your Ticketholders, contact a local WIPA project. Find contact information at <https://choosework.ssa.gov/findhelp/index.html>
- For information related to Virginia Commonwealth University (VCU) Work Incentives training, go to <https://vcu-ntdc.org/training/initial/initial.cfm>
- If you have questions about the WIPA RFA, please send them to [SSA\\_TA@grantreview.org](mailto:SSA_TA@grantreview.org)
- Certifications: Social Security recognizes the following certifications for providing Work Incentives counseling services under the Ticket to Work Program:
  - For ENs: Social Security recognizes EN staff who have completed and maintain certification under any of the following training programs:
    - VCU – Community Partner Work Incentives Counselor (CPWIC)
    - Cornell University – Benefits Work Incentives Practitioner (BWIP) certification
    - Indiana University – Benefits Information Network (BIN) training
  - For WIPA projects: Social Security requires WIPA staff to complete and maintain certification under the VCU Community Work Incentives Coordinator (CWIC) training program.
- WIPA Firewall: For organizations that house both a WIPA project and an EN, all direct service duties of the WIPA cooperative agreement and the EN contract staff and services must be separated. The same individuals cannot provide direct services for both the WIPA and the EN. Administrative and supervisory staff may serve under both programs.

## Next call

The next Quarterly All EN Call is scheduled for Tuesday, May 18, 2021, at 1 p.m. ET.