

Operator: Good day, everyone, and welcome to the Quarterly All-EN Call. Today's call is being recorded.

And at this time, I would like to turn the call over to Robert Pfaff. Please go ahead, sir.

Robert Pfaff: Thank you. And good morning or good afternoon, depending on wherever you are calling in from. We appreciate your time and thanks for joining us for this quarterly All EN Call.

A couple of things that I will open up with and I am going to deviate a little bit from script here, just give you a little bit of data programmatically to let you know how things are going overall in the program this year as compared to last year.

We are about three quarters of the way through the current fiscal year for FY '21. And we are doing better in terms of assignment and program participation. We are averaging, this year, 17,137 assignments for the year — that's our total, I'm sorry, not the average — as opposed to 16,650 for last year.

We have — we are averaging 505 Tickets assigned versus 494 for last year. So, things are looking up a bit overall in terms of program participation. And please continue to do your best to increase the number of beneficiaries who have your services provided to them. Continue to attempt to market your services to our beneficiary population.

And it looks as if the economy is improving with a lot of folks receiving vaccinations and so forth. And as a matter of fact, a lot of — a lot of employers are desperately seeking qualified workers, which I will touch on in a bit.

I will, excuse me, transition over to an update in regard to the Ticket Program Manager contract. And I don't really have anything to share in terms of an update. We continue to work through the nuances associated with, you know, the contract itself and the award process.

Again, I've said this before, but, you know, there's a lot of complexities in play here. We are just following through on due diligence and taking all the appropriate actions to make the contract award. We don't have a timeframe in mind, but once we get an idea of some more firm information that we can share with everyone, we will certainly let you know what is happening with the contract.

So, that's, unfortunately, all I have to say about that. But really, in the meantime, excuse me, business continues as usual. This will be seamless — should be seamless for you in your daily interactions and the conducting of your business and Maximus continues to serve in this current role. So, all services remain as is.

I'll transition over a little bit to an update on the Employment Summit. And we are a little bit on a holding pattern. We've had a lot of initial discussions with different parties to obtain information about a summit.

And you know, when I — for those of you who may be unfamiliar with this, really the idea and the goal stems from a previous summit SSA held in June of 2019. One of the recommendations was for SSA to try to link the Ticket to Work Program more closely with employers and jobs to help beneficiaries go back to work with jobs readily available by — or from employers.

What we would — what we're hoping to achieve is to make it easier for beneficiaries to find jobs, make it easier for service providers to place their clients in these jobs, whether they're employer networks or Vocational Rehabilitation agencies, and make it easier for employers to hire individuals with disabilities.

So, we have drafted a plan that we have submitted to our executive leadership. We are waiting to conduct a meeting and obtain feedback on that plan. And really, that's a critical point for us in understanding, you know, where the vision is for this summit from our executive leadership should go moving forward.

So, really, at this point, we had a meeting on the calendar for this week. As you can imagine, you know, emergencies arise and important issues arise and meetings have to be moved around. So, unfortunately, this got pushed back to next week, but not too bad.

So, we are looking to meet next week, go through the plan, obtain input, and then, really hit the ground running with, hopefully, what we will have as a firmer timeframe to execute this summit. It will be virtual. We know that.

It will consist of, you know, representation throughout the program of employment — some Employment Networks, some Vocational Rehabilitation agencies talking about the services and supports that they provide and their relationship with employers. It will contain a representation of employers either in a panel setting and/or in a broader context to learn more about our programs.

So, we will share information as has been approved and as we get it more, you know, formed and structured. We will certainly make that available, and then, keep you in the loop about that summit.

If you have, in the meantime, ideas you would like to submit, please feel free to reach out to us. You can send an email to me directly or contact us and Adelle can share the relevant mailbox that you would send your email to for this.

So, one other thing I will point out is we do have a (During Cara) segment. I will tee this up for Cara, you know, some update and further information for VCU training, the availability of the training, but really, more about some things that we're learning as we go through the process of directing Employment Networks and VR staff who would be interested to take this training.

We've gotten some feedback that we think is useful. And so, Cara will walk — will walk us through some of that during her segment for item three.

So, that's all I have for right now. At this point, I would like to turn it over to Patrice McLean, who will talk a bit about the BPQY changes. Patrice?

Patrice McLean: Good day, everyone. Again, this is Patrice McLean, and I am bringing a few updates, one about our BPQY fulfillment process, our request process; and one about the BPQY pilot that we've conducted for about six years now.

First, for anyone on the line who is unfamiliar, the Benefits Planning Query, or BPQY, was created in large part with individuals and organizations, such as Employment Networks in mind. It's a tool that gives a snapshot of a beneficiary's current benefit situation, that helps Employment Network and Vocational Rehabilitation offices etc. and WIPA programs as well, helps individuals with their return to work.

The BPQY contains information, such as what type of benefit an individual is receiving, if they are receiving benefits, how long they've been receiving benefits, whether there's a medical review plan on — for that individual, and also, information about the use of work incentives such as the trial work period.

The reason the BPQY is on the agenda for today is because we have to make a change with — to some of the work history information that appears on the BPQY, namely, the yearly earnings information that we receive from the IRS that appears at the bottom of the

BPQY statement. Unfortunately, we're going to have to hide that IRS information until — at least for the time being.

Typically, in order for ENs, such as yourself, to request a BPQY statement, you submit -- you have the beneficiary sign and you submit two release forms called the SSA-3288. Many of you know that the reason that we require two 3288s is because, one, authorized release of the information housed in SSA's records, and the other authorized release of information that we've received from the Internal Revenue Service or the IRS.

While the 3288 form is perfectly valid to request information that's housed in SSA's records, we were recently informed by our attorneys that the release form we are using is not sufficient to release IRS information under IRS regulation. So, unfortunately, we're going to have to hide the IRS information that we were previously releasing on the BPQY.

Now, we realize and understand that taking that information off the BPQY does affect your process. It affects the information that you have available to work with beneficiaries and recipients. We're hoping that the remainder of the BPQY statement is enough to help you continue to serve our beneficiaries.

We did look into other options for providing the IRS earnings and the other option would be a form called the SSA-7050, the 7050, which is a request for Social Security earnings information. However, the business process for that form requires the agency to charge a fee to release that IRS earnings information to third parties. And we've looked all around but there's just no way around using that 7050, the fee that's associated with that 7050 for third parties.

It was never our intent to charge third party the fee for the BPQY or for any of the IRS earnings, especially since the purpose of the BPQY was to provide, you know, return-to-work services and benefits counseling. You know, as such, we are not able to use the 7050. We're going to continue to look at other options, but based on regulations, we are going to have to remove and have already removed IRS earnings from the BPQY. Of course, the BPQY does have standalone value and everything else on the BPQY remains unchanged.

If you still need yearly earnings data, there is still a way to do that with the beneficiary's involvement. Beneficiaries have access through the Social Security statement through their *my* SSA account, and any beneficiary without a *my* SSA account, please we encourage you to encourage those beneficiaries to obtain a *my* SSA account.

Once the beneficiary has a *my* SSA account, they'll have a — they'll have access to their online statement which provides immediate access to their earnings to either view, print or save that Social Security statement with the IRS earnings. A BPQY, along with the earnings information from *my* SSA, will provide you with the same information you were accustomed to seeing on the old BPQY.

With regard to how you're going to continue requesting BPQY, the process only changes slightly. Instead of using two 3288s, we only need the one 3288 that authorizes the release of SSA information. So, we still need one 3288, but it has — you know, we need the remarks that say that it's for the release of SSA information because, of course, we cannot release IRS information with the 3288 anymore.

Know that we're doing all that we can to bring this information back, but as of right now, there is no clear path to making that happen. So, we'll continue to keep — we'll continue to keep you apprised of any progress we make on this front. But again, earnings information will still need to be hidden on the current version of the BPQY.

With regard to the BPQY pilot, we implemented a pilot to provide BPQYs to employment support providers, such as ENs and VRs with the organizations (it has) back in 2015. And we conducted the pilot with a very specific purpose in mind. We wanted to gather research that would help us to inform the BPQY process, and also, BPQY policy as needed.

We've since completed that evaluation. And so, we are going to end the BPQY pilot in the very near future. We don't have an anticipated end date yet, but as soon as we map out the end of — you know, the end date of the pilot and the — a couple of other details, we will be sure to send information prior to ending the pilot to all of our employment support providers via our email service.

Even though we're ending the pilot and the evaluation, we'll, of course, continue to look for ways to improve the BPQY fulfillment process because we understand how important it is for you guys to have that information. So, again, just to summarize, we are — we've removed the earnings information on BPQY and we're going to be ending the BPQY pilot in the very near future and we're going to provide information in the very near future with a few more details once those are ironed out.

Adelle, I am wondering if we can stop here and take a few questions on anything that we've heard so far. I do have a few individuals on the speaker line who can answer — who can help to answer questions who are not going to be able to remain until the end of the call. So, would we be able to pause and take a few questions? If there are any.

Adelle Barr: Yes. We sure can. Do you want some from the phone line? We do have some from the phone — from the chat.

Patrice McLean: Yes.

Adelle Barr: So, (Lisa), if you can help us compile a few from the phone line for us, some questions about the BPQY only, please?

Patrice McLean: Yes. And that ...

Operator: Absolutely.

Patrice McLean: And I do want — I'm sorry. I just want to make sure, this is just about the BPQY and anything related to us having removed the earnings or ending the pilot, not questions that has to do with specific BPQYs or why someone's medical CBR date is this date. We can't answer specific questions, but just about the updates that I just provided. We'd be happy to answer those, so, please go ahead.

Operator: Okay, great. If you would like to ask a question on the phone lines, you can press "star," "1" on your telephone keypad. As a reminder, if you are on a speakerphone, please remove your mute option to allow your signal to reach our equipment. Once again, everyone, that's "star," "1" to ask a question on the phone lines.

Adelle Barr: And while we wait for that, just to confirm, you did mention, Patrice, that the SSA 3288 is still needed to be submitted.

Patrice McLean: Yes, that is correct. We need one 3288 to release the information that's housed in SSA's records instead of the two that we used to use.

Adelle Barr: Okay. And of course, the BPQY can be requested by the beneficiary, correct?

Patrice McLean: I'm sorry?

Adelle Barr: The BPQY can be requested by the beneficiary?

Patrice McLean: Yes. The individuals who are able to request the BPQY, that list hasn't changed, so ...

Adelle Barr: Okay.

Patrice McLean: ... yes, BPQYs can continue to request BPQYs.

(Crosstalk)

Operator: All right. And now, there are no phone questions.

Adelle Barr: No phone questions, okay. I have a few more here, so perfect. Do we need to change how we fill out the copy of the SSA-3288 that is provided to SSA or should the verbiage remain the same when we complete it?

Patrice McLean: The verbiage should remain the same.

Adelle Barr: Awesome. And any possibility of making the BPQY accessible through *my SSA account*?

Patrice McLean: That is our ultimate wish list item. We are going to continue to see what we can do to make that happen. But because My SSA is a platform that's accessible to individuals, we're — we would have to work out how third parties would be able to go into My SSA to request that information.

So, it is — it is on our wish list. We don't have a date of when it might be available or if it's going to be available. But if there is a way, we will do our best to make it happen.

Adelle Barr: Okay. Let me see if we have any. If we end the BPQY program, how are CWICs able to gain information to accurately inform clients on how work affects their benefits?

Patrice McLean: So, I want to -- I want to make clear, we're not ending BPQY fulfillment altogether. It's just the pilot that we've rolled out to some WIPA and EN and VR organizations in 2015 that were requesting BPQYs do a special process.

BPQYs will still be available. You can request them — they're — beneficiaries can request and do the 800 number. Third parties can request them through the 800 number. You just — you can also request them from your local field office, as long as you have the 3288.

So, BPQYs, in general, are not going away. So, CWICs and CPWICs will still have access to them just not through the pilot that we implemented in our — in the Ticket Program office starting in 2015. Once we send an email with details on ending the pilot, we will make sure that we send out the ultimate method for request BPQYs, so that those who were in the pilot know exactly where they can go to get it moving forward.

Adelle Barr: Thank you, Patrice. Is there a fee for the BPQY?

Patrice McLean: If the BPQY is requested for return-to-work purposes, there is no fee. And I know we have a few other items, so I think we can take maybe one more question, and then, I'll hand over to Cara.

Adelle Barr: Okay. Can the BPQY e-Fax benefits counselors with the permission of the beneficiary?

Patrice McLean: That is a good question. (Christine) or (Deb), if you're on the line, if you can unmute. I know that third parties can request from our field offices. My assumption would be that, yes, they can be faxed to whatever number is provided, but I want to double check with you guys.

(Christine): Hi. It's (Christine). You're correct, Patrice. They can — we can e-Fax it via e-mail and stuff. I believe that's what's going on since the field offices aren't open. So, the request comes in and we can e-Fax it back.

Patrice McLean: All right. Perfect. I'm going to hand over to Cara. If there are any addition questions that we weren't able to answer regarding the BPQY process and document updates, please send them to ENService@ssa.gov and we will make sure to get that information back over to you.

Again, any questions that we were not able to answer, please send them to enservice@ssa.gov and we'll be sure to get a response to as soon as possible. And with that, thank you for your time. I will turn it over to Cara Caplan with some additional updates.

Cara Caplan: Thanks, Patrice. Good afternoon, everyone. So, this year, we've requested applications for cooperative agreements to provide work incentives, planning and assistance services across the country.

The competition closed on April 19, 2021. We are reviewing the applications. If you apply, you should hear something by the end of June or early July. So, just be patient.

I want to give you a little update on training. So, as you may know, we offer free training, and this is what Rob was talking about earlier to Employment Networks and Vocational Rehabilitation staff who want to provide work incentive counseling through Virginia Commonwealth University.

We recently received some feedback about the training experience for individuals who are still performing other DDs will go into the training. The feedback was that the training was good, but stressful for people who were trying to complete their other DDs at the same time. To make you guys aware, we did design this training for the WIPAs to enable the WIPA staff to work with beneficiaries as quickly as possible.

If you choose to send staff to the training, please keep a few things in mind. First, the person you send must have good analytical writing and good people skills. Second, they must have a clear calendar for the first three weeks at least in order to focus on the training. It is a challenging class and it's not fair to the EN community partner who participates to be expected to complete the class and their regular duties at the same time. So, what we're saying is it is a commitment.

Please remember when you sign up for the training to clearly indicate that they are Employment Network staff. We recently had somebody not indicate that and they got declined for the class. And they'll get in the next one, but they did get declined for this one.

Employment Network staff attending this new training must have suitability. And then, I just want to give you an update on suitability. This is a reminder that SSA does require all persons working with the Ticket to Work agreement, including administrative EN affiliates, to have a positive suitability determination in order to work under the program. Not having suitability is a violation of your Ticket Program Agreement.

And then, lastly, we updated our Find Help tool to make each EN name within the EN profile a hyperlink. So, it will go directly to your website. We have also updated the Find Help tool to add benefits counseling certificates for 2021. But you can update this through the year as soon as anybody on your staff gets full certification.

So, and just so you know, provisional certification does not allow you to start working with the beneficiaries. You must have full certification.

And that is all I have. I will hand it over to (Ana).

Ana: Thank you, Cara. Can we move to the next slide, please? So, I'm going to give an overview of the Employment Network business model. And go to the next one, please. Thank you.

So, I'm going to review the three main business models that we have for Employment Networks. And these are the approved business models per the request for application or the Ticket Program agreement for Employment Networks.

So, first, we have the traditional EN. This is the bulk of the ENs. Actually, 92% of our service providers fall under this business model. And this is where Employment Networks provide employment services and other supports directly to the Ticketholders.

The second one is the employer ENs. And this is where the EN employs Ticketholders or serves as an employment agent. And the third one is administrative EN, which is very particular in the operations of the program. There is an EN of record and provider affiliate and they, altogether, provide services to Ticketholders. So, I'm going to go in one by one to give you a little bit more information about them. Next slide, please.

In the next slide, I'm going to just highlight one main example of services provided by a traditional EN. And of course, these are taken specifically from the request for application. So, this is, like, exactly the verbatim that is in there.

But there are many other services that are provided by Employment Networks that are — that don't — these are not exclusive. The one that I want to highlight is direct job placement and this is the main goal of the program, right, provide services to Ticketholders, and ultimately, help them become self-sufficient, find a job and not depend on that cash benefit from Social Security.

And along with this, the direct job placement plays a big role when it comes to services. And the way that is highlighted for the traditional EN is to have an agreement with a pool of employers to place Ticketholders in jobs — in jobs. So, it's just that relationship that happens where the Employment Network has an agreement with employers and they place the Ticketholders in jobs, along with the breadth of the services that are provided by the Employment Network. Next slide, please.

The next one is the employer EN. Thank you. So, the employer EN has two main characteristics. One is the Ticketholder is employed directly with the Employment Network. And one important information that I need to highlight is that, if the Employment Network hires as a minimum of one Ticketholder, they classify them as an employer EN.

So, they need to apply for this business model if that is the case or, when the Employment Network serves as an employer agent, and that means that employment network is being compensated by an employer, the contract agreement or other working arrangement to locate and place suitable jobs to candidates.

So, it's a little bit more involvement when it comes to finding jobs. It's not just an agreement where the EN is sending the Ticketholders to place them on jobs. But there is something else happening between the employer and the EN and that makes them an employer agent.

Something to consider for an employer EN is that they — available jobs should pay or are expected to pay wages at or above the SGA level, the substantial gainful activity. SSA will evaluate the compliance with the provisions by determining at least annually whether these individuals are making at least 80% of those achieved (available) earnings within nine months following the Ticket assignment. So, it implies a little bit more of oversight for this employer EN.

Can we move to the next slide, please? And I'm — I apologize. I feel like there is a little bit of lag, that's why I'm pausing in between the slides. I just want to make sure that when I'm talking, I'm in that slide, so you can see it as well. Thank you.

So, in this one, again, these are the exact services taken directly from the RFA. And for employer ENs, we have at least, I want to say, 5% of the EN population that fall under this model. Another important point that I want to mention is that, staffing agencies, they also fall under the employer EN model even though they employ Ticketholders for a short period of time. That also qualifies them as an employer EN.

And from these services, again, if you notice, the number one, obviously, employment, hiring the Ticketholder. And as a reminder, a minimum of one Ticketholder will qualify them for an employer EN and the direct job placement, which, in this case, like I mentioned before, has a little bit more of involvement between the EN and the employer to place individuals with disabilities in suitable jobs. Let's move to the next slide, please.

And I'm going to start talking on that one. There you go. So, the next one is the administrative EN. An administrative EN is an organization that functions as an EN of record, (particular assignment) and payments, administrative requirements with actual Ticketholder service provided by provider affiliates.

And the reason why this is in bold is because we want to make sure that it is clear that, for

an administrative EN, the services to Ticketholders, should be provided by the provider affiliates, and the EN of record, who is the main EN that has the agreement with Social Security takes care of the administrative portion of the program, which is Ticket assignment, payments, all the different responses to Social Security and PPM, making sure that all your individuals are suitable and so forth. So, we want to make sure that that difference is clear to everybody.

And also mention that the only service that an EN of record can provide to Ticketholders is benefit counseling. But the rest of the services should be provided by the provider affiliates. The EN of record is responsible and accountable for all the actions of the provider affiliates because they are — to Social Security, the provider affiliates are an extension of the (tasks) of the EN of record. So, that's why they are responsible of all this.

And I already mentioned the suitability. The EN of record is the one that defines the terms and conditions of that relationship with the provider affiliates. And I believe I already mentioned the benefits counseling.

So, the next slide is, again, an example of the services taken from the RFA. I want to highlight, again, the direct job placement. This one falls, again, under the administrative EN model. However, it works exactly as the model for a traditional EN. It's just a relationship where the EN of record has a relationship with the employer and they just work together to place people in jobs.

And the last slide, please. So, in the next slide, I just want to mention the multiple business models. Of course, ENs may operate more than one business model. For each business model, they must have a separate EN name, separate DUNS, and a separate registration for that new DUNS under SAM.

One thing that we want to make sure, for anybody that is interested in doing this is that you follow the instructions to the tee and don't deviate, don't skip, don't do it your own way because, if you do that, it's going to be extremely hard for you to accomplish getting the new DUNS and registering in SAM.

We went through all the different steps two years ago, I believe, to put these instructions in place and we worked with existing ENs that help us put all these instructions together because this is something that has to be followed in a specific order to be successful.

And after you get that DUNS and you are registered successfully in SAM, you — ENs, if they would like to get more than one business model, they need to complete the part three of the Section 5 of the RFA and submit that information to EN service for approval.

And with that, I'm going to hand it to Pat Van Nelson to provide outreach updates.

Pat Van Nelson: Thanks, (Ana). Did we get our slides? Thank you.

I'm Pat Van Nelson and I'm the director of communication and outreach for TPM. Today, I want to bring you up to date on some of the programs and outreach activities since the last meeting in February and preview a little bit of what's coming. I'll be talking about our social media advertising, our ongoing organic social media, recent publications for some monthly-wide webinars and success stories.

We've had some impressive results and let's share it. One of the most satisfying efforts we've undertaken is advertising to Google call ads. Those ads, which are only available to mobile devices, the purpose is to prompt people to call the program's help line or call center.

The ads themselves are pretty short, only 180 characters, and they briefly mention topics that relate to either benefits we're working or both. The ads are sent to people who searched on this as a related term, such as SSI benefits on Google. So, they're already sort of in the community. People can click on the link in the ad and it takes them directly to the call center.

Each week, the ads send several hundred people there. For example, the ads sent 763 people to the help line. And looking at the people who are calling, we found that more than 85% of those callers were Ticketholders.

If you can turn to the next slide, please. Thank you. We're also continuing our Facebook advertising, which pushes people to the choose work Web site for more information.

Since January of this year, the ads sent more than 11,000 people to the site. They also generate thousands of shares and comments. The ads are always sent to those who have shown, through these clicks and likes, and interest in disability-related topics. Since our last call, the ads have reached 323,000 people. Next slide.

To complete our advertising story, I want to mention our text messaging campaign. We send one message a month, so as not to inundate people. The objective is to either highlight a specific item, such as an upcoming webinar or specific parts of the Web site, such as a new fact sheet or a blog post or a success story.

Since this presentation was prepared, the numbers have changed. Instead of (8,450); we now have 9,100 opt-ins. And we're closing in on transactions, which is particularly impressive as it's a totally voluntary opt-in campaign. We're also doing well when we measure our click rate against industry benchmarks with our 18% versus 19%. And we're pretty happy with how the text messaging has been going. Next slide.

Here you go. The next couple of slides address a regular non-advertising social media that includes our daily postings on Facebook and Twitter. Posts generally highlight our ongoing work to produce (vaccine) success stories, webinar, as well as recognition of relevant observances.

For example, this month of May, we've got Mental Health Awareness Month, North American Occupation Safety Health Week, Armed Forces Day, National Teacher Day, and, of course, Memorial Day. So, we try to make a tie in between those particular observances that had some relationship to the program. In addition to the post on Facebook and Twitter, we also manage a delivery list of about 80,000, that we use to promote publications and Social Security announcements. Next slide.

If you hear any background noise, it's cicadas. Some people would say that when there is silence there's crickets. In this case, there are cicadas and there are thousands of them in my backyard.

Moving right along, blog post. We publish a weekly blog post. You can see the most recent ones here.

We try to cover both Social Security topics, such as overpayments or the Trial Work Period, but we also try — spend some time with employment-related topics like the monthly career fair (post) and topics like apprenticeships and (interviews). I'm happy to say the average viewership for those topics that are on the slide was slightly about 6,000 views each. Next slide.

Fact sheets. We produce those about every other month. Recent ones have included Medicaid and Medicare and the Trial Work Period. Those are two separate ones. The trial work period, we just updated to include 2021 information. And since their publication, each fact sheet has brought in more than 25,000 unique views. Next slide.

Look at that. Very good. The most recent fact sheet was based on information from a panel of ENs about how their business practices changed over the past year and how they've embraced remote service delivery.

And then, the next one which will be published soon is one we thought we would have already had. I mean, the program has been around for a while, but we never had a general overview of the program fact sheet. So, that's the one that will be published next month. Next slide.

Webinars. Our principal outreach tactic is, of course, the multi-wide webinar. We attract about -- between 400 and 600 people each month. And every month, we prepare an outreach plan for all our activities, but it's organized around the topic of the webinar.

For example, we'll coordinate our social media post with a webinar topic or feature success stories that's particularly relevant in the webinar topic and we always include in the — in the webinar itself Social Security and Ticket Program information. But we also include topics relevant to employment.

Our next webinar is tomorrow, the — in the afternoon at 3 o'clock Eastern. The topic is Working from Home with Ticket to Work. It's always a well-attended one and, so far, we've got more than 1,900 people registered. Usually, we have an attendance of about 30% - 35% of those who register actually attend. So, it should be a very well attended one.

And I want to say that we're really fortunate that many of you and other cooperating organizations also publish these events for us. And last month, more than 50 organizations promoted attending the webinar. And of course, you can register for the webinar. It's just [choosework.ssa.gov/wise](https://www.choosework.ssa.gov/wise). And if you miss the webinar, you can always do it on WISE On Demand two weeks after it airs or two weeks after the live event. Next slide.

Everybody knows that, you know, there's probably nothing more compelling than the story about somebody who actually made it to the program, and then, succeeding to be financially independent. And when we write these stories, they turn out to be very popular. But we can't produce them without you.

You're the ones that send us the candidates about successful beneficiaries. So, if you could please consider whether you have possible candidates to star in these features, it would be really appreciated. And you can send candidates to stories at choosework@ssa.gov.

But please, remember, don't include any PII's and don't send any already written stories. All the candidates have to be vetted by Social Security before we can actually develop the story. But they are very important to us and I do hope that you will be able to send us some.

And finally, here you go. Here are all the ways to make sure you don't miss any of the programs, news or new features. And we've got Facebook, we've got Twitter, YouTube and of course GovDelivery. And as I mentioned earlier, I'm dying to get to 10,000. So, if you haven't already, please consider opting in to our text messages.

Remember, we only send them once a month, so you won't be swamped. All you have to do is text "Ticket" to 474747. And of course, you always have the option to opt out anytime.

So, with that plea, I'll turn the mic over to Adelle for questions. So, thank you.

Adelle Barr: Thank you very much, Pat and all our presenters today. That was some great information. And at this time, we'll open up the lines for any questions. So, if (Lisa) can help us out with getting that from the queue?

Operator: Absolutely. As a reminder, everyone, that is "star," "1" on your telephone. And if you are on a speakerphone, please make sure your mute option is turned off to allow your signal to reach our equipment. All right. We'll pause for a moment.

It looks like there are no questions.

(Crosstalk)

Adelle Barr: Okay, the same as last time. I do have some here while we get those compiled just in case.

Cara, can you repeat the two things to be mindful of when considering whether one should apply for the benefits training?

Cara Caplan: Of course. That it is going — I'm just looking back at my notes to make sure I say exactly what I said. First, you know, the person should have good analytical writing and people skills. It is very demanding, the training; and the calendar should be cleared,

most importantly, for the first three weeks at least because of the focus that needs to be done on the training.

Adelle Barr: Thanks very much. Appreciate that. Patrice, could I ask you to repeat the 1-800 number for the BPQY? Make sure — (Lisa), could you make sure that we didn't lose Patrice?

Operator: Yes, one moment.

Adelle Barr: Okay, good. I thought for a minute that I was the (exit) one.

Operator: It looks like her line is still established.

Adelle Barr: Okay.

Operator: She may have muted herself.

Adelle Barr: We do have — do we have any questions on the queue yet?

Operator: No. But I would like to remind everyone it's "star," "1." All right.

And there are no questions.

Adelle Barr: Okay. Someone indicated that they keep missing the training information. What is the training and who is it for, please? I believe that would have been the information, Cara, you were going over? Just touch on it really quick.

Cara Caplan: Sure. It's not mandatory training for ENs. It's 100% voluntary. Virginia Commonwealth University, who is our contractor for the training and technical assistance for our WIPAs and provide benefits counseling training to our WIPAs. And often we have extra space in the training classes, which we allow the VRs and the ENs to go into, so they can become certified benefits counselors.

Adelle Barr: Perfect. And that's about three weeks, right?

Cara Caplan: Yes. Well, the class itself is in three weeks, but it's after the class — the class itself, I believe, is one week. But then, when the class is over, there is a lot of post work — post-class work to do.

Adelle Barr: Okay. Thank you, Cara.

Cara Caplan: Hopefully that helps. And I think Patrice is back on now.

Patrice McLean: Yes, good afternoon. I'm sorry. I stepped away for just a moment and I believe there was a question about the phone number for requesting BPQY.

Adelle Barr: Yes, ma'am.

Patrice McLean: And I am going to — yes, I'm going to look up that number and just give me a few moments and I'll chime back in with the exact number. I think I know it by heart, but I'm afraid to give the wrong, you know, whether it's 800 or 877. So, give me a few minutes and I will chime back in with the correct phone number.

Adelle Barr: No problem.

Patrice McLean: All right.

Adelle Barr: We understand.

Operator: All right. We do have a phone question.

Adelle Barr: Great.

Operator: We have a question from Freddie Floyd with Return To Work Consultant.

Freddie Floyd: Hi. Good afternoon, everybody. My question is in reference to advertising. And I was trying to (write down) some notes, you mentioned Facebook or we can go in here and we'll look up — we can advertise our business, right, on Facebook. And you mentioned regular non-advertising. Could you elaborate on that a little bit for me? Just a — just a snippet of that, please.

Pat Van Nelson: If I — if I — this is Pat. If I understand your question is — are you interested in the distinction between advertising and non-advertising social media?

Freddie Floyd: Well, I know what is non-advertising — well, non-advertising, but I know — I thought that there may be just one place where ((inaudible)) or say, if you want to go on a career post or wherever. I just want to get more information on advertising our business. I'm trying to make it clear.

Pat Van Nelson: Our advertising is, you know, obviously, strictly about the program and ...

Freddie Floyd: Right.

Pat Van Nelson: ... so — and there's a cost, obviously. And ...

Freddie Floyd: Oh, okay.

Pat Van Nelson: Yes. And I mean, it is paid advertising. And so, usually, to do advertising on Facebook, you would need a vendor who specializes in doing that because ...

(Crosstalk)

Pat Van Nelson: ... what they're doing is they're trying to develop your market through targeted advertising. So, they need to know, you know, who you're trying to reach. And it's — there's — it's an art as well as a science. It's not something

(Crosstalk)

Patrice McLean: ...I would assess on my own.

Freddie Floyd: Okay. Is there a particular agency that you particularly work with or (return in an) agency too where they can advertise? I know we are advertised under the directory, but also, outside of the directory. I thought that you may know and advertise on companies that you work with or refer ENs too.

And also, I wanted to know if I need to talk with you or contact SSA if I wanted to do business ((inaudible)) throughout the state of Michigan. And I think people are calling in more often than used to like in 2020 because of the economy and the pandemic.

However, would you be the person that can answer whether I can advertise in, like, Ohio or do I need specific papers to complete and submit in order to advertise our (interest) in another state, put it that way?

Pat Van Nelson: To me — no, I would not be that person. I would think ...

Freddie Floyd: Okay.

Pat Van Nelson: ... that that would be a question directed to someone at Social Security with regard what your employment contract allows.

Freddie Floyd: Okay, got it.

Pat Van Nelson: So, I would — I would defer to someone else on this line.

Freddie Floyd: Okay.

Robert Pfaff: Yes. And so, this is Robert Pfaff. And so, if you want to advertise in another state outside of the state that you're physically located in, I'm — to my knowledge, and Cara can answer this as well, but there should be no issues surrounding that.

If you would like to send us some detailed questions or otherwise like to set up a call to speak with someone, we'll give you an email address. Adelle, if you could just offer up an email address that she can send her questions and inquiries to in regard to marketing that would be great.

Adelle Barr: Sure thing.

Freddie Floyd: But I'm trying to stick to the subject, but ((inaudible)). Thank you, anyway.

Robert Pfaff: Sure. Yes, no problem. Adelle?

Adelle Barr: Yes. Actually, that can probably go to ENService@ssa.gov and I'm posting that up.

Freddie Floyd: Okay, got it. Thank you.

Patrice McLean: And this is Patrice — this is Patrice. I had an update for the individual who was asking about the 800 number that you can call to request BPQY. It's 1-800-772-1213. That number again is 1-800-772-1213.

And I also want to mention that Social Security, since our offices are closed for the most part, has been also — field offices have also been responding to BPQY requests via e-Fax. So, to find your local field office, for BPQY, go to www.ssa.gov/locator. Again, that's ssa.gov/locator — L-O-C-A-T-O-R. Just put in the ZIP code and you'll be — the ZIP code close to where the beneficiary is and you'll see the contact information to include a fax number for that local field office. You can send the 3288 there and they will respond via e-Fax with a BPQY. Back to you, Adelle.

Adelle Barr: Thanks, Patrice. This is more to make sure I get that right — ssa.gov/locator?

Patrice McLean: Yes, that's correct.

Adelle Barr: And I also will have that going across the screen.

Patrice McLean: Thank you.

Adelle Barr: Yes. (Lisa), any questions — any other questions in the queue?

Operator: Yes. We have a question from Ken Williams with Adelante.

Ken Williams: Good afternoon, everyone.

Adelle Barr: Hey, Ken, good afternoon.

Ken Williams: Just a quick clarification question on the BPQY pilot. When that ends, is my understanding, that those ENs that were involved in that will no longer be able to request the BPQY through their GSO accounts?

Adelle Barr: Yes, Ken, that is correct. So, whether you're the first part, ENs who are requesting BPQYs through GSO, we will no longer be able to fulfill those requests. So, we're going to send some information out which will include alternatives such as contacting your field office, the 800 number that we gave and so on and so forth. And so, once we send that information, you'll have a date of when we will receive our last request through the GSO.

Ken Williams: That's going to be very, very unfortunate for sure.

Adelle Barr: Yes. We understand. Believe me, we do. And we're going to continue to look for ways that we can better provide BPQYs at least to employment support providers because, again, we understand especially for WIPA organizations and as importantly for ENs and VRs and some (tax) organizations, you rely heavily on those documents, and I know that there are, you know ...

(Crosstalk)

Ken Williams: Yes, certainly.

Adelle Barr: ... piloted ...

(Crosstalk)

Ken Williams: With that — with that being mentioned, are WIPA projects going to be challenged with the same thing? They're going to have to look for alternate ways and not be able to request it through GSO account?

Adelle Barr: Yes, that's correct.

Ken Williams: All right. All right. Thanks for the clarification. Appreciate it.

Adelle Barr: No problem, Ken.

Operator: All right. And there are no further questions.

Adelle Barr: Thanks, (Lisa). We have a question about three SSA-3288. Should that form allow local SSA field offices to speak to EN representatives about the beneficiaries and not just get — request the BPQY?

Patrice McLean: That's a good question. I am not — I am not of — I do not believe that that one will allow Social Security to verbally discuss information about the BPQY with ENs. So, my answer to that would be no. But I'm sure field offices have a special release

form that you can request that will allow them to divulge certain information. I — we don't have a field office on our staff though and headquarters.

So, I really don't know exactly what they'll need. But it will be more than the 3288. So, yes, the field office cannot with a 3288 discuss more information about the beneficiaries, you know, work status, medical history, etc.

Adelle Barr: Okay. Do we know when field offices will be open to the public again?

Patrice McLean: No, we do not.

Adelle Barr: Okay. And do we have any plans for additional training at the local offices to provide BPQYs? Some of the local offices have said that they're too busy to provide BPQYs.

Patrice McLean: It's — we — it's really not on — it's not a part of our offices service divisions to train field offices. But at times, we do receive requests through our EN service mailbox where individuals are having several ((inaudible)) BPQYs or are being charged for BPQYs. And sometimes we'll send that over to our peers in the field offices or in operations to try to rectify those issues. But as far as planned trainings, there are none right now.

Adelle Barr: Okay, thank you. (Lisa), any questions from the queue?

Operator: All right. And there are no phone questions at this time.

Adelle Barr: Okay. Let me go through a few more questions here. A BPQY must be sent by fax or mail in order to avoid breaking EN PII rules. Is that correct?

Patrice McLean: I'm sorry. Can you repeat that one more time, Adelle?

Adelle Barr: Yes, I will. A BPQY must be sent by fax or mail in order to avoid breaking EN PII rules. Is that correct?

Patrice McLean: Yes. But if you're sending a BPQY request to a field office, it will likely be through e-Fax. So, that will not break PII rules. That would be through e-Fax. In fact, they — that is allowable.

Adelle Barr: Okay. There is a question about the work number. Is there more than one provider who can provide that report to be used to request payment or does everyone pay the same fee for the report? Do we have that information about the work number or any other?

Patrice McLean: Yes, we do not. And there might be off-limit methods. They are just — they're private companies, not — they're private companies. Unfortunately, we're not able to give a list of alternate providers.

Adelle Barr: Got it. Okay. I'm scanning through here. I think we've covered most of the questions. (Lisa), any on the phone queue?

Operator: No, there are no questions. As a reminder, that's "star," "1" if you do have a question.

Adelle Barr: Okay. Has SSA entertained the idea of looking into the account recovery process for the *my* SSA account?

Patrice McLean: Yes, that's — this call wouldn't be the forum for that question. I wish I could reroute you somewhere else. But we don't manage *my* SSA accounts.

Adelle Barr: No worries. Well, it looks like those are the questions that we have here. (Lisa), last call on the phone queue?

Operator: All right. And there are no phone questions at this time.

Adelle Barr: Okay. Well, I would like to thank everyone today for their presentation and, of course, everyone on the phone lines for their participation and their attention. And the next call will be August 17 from 1:00 to 2:30. And I'd like to wish everyone a great rest of the day.

Operator: And that does conclude today's presentation. Thank you for your participation and you may now disconnect.