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Operator: Good day ladies and gentlemen and welcome to today's Social Security Administration National Disability Forum. At this time, all participants are in a listen-only mode. But later we will have a question and answer session and instructions will be given at that time. If you should need audio operator assistance at any point during the program, please press star and then zero. As a reminder, today's conference is being recorded. At this time, I'd like to turn the floor over to Mr. Jim Borland. Please go ahead sir.

Jim Borland: Thank you very much. Good afternoon everyone and if you are on the line from California, good morning. I just wanted to welcome everyone to what is our sixth National Disability Forum. It's my first National Disability Forum and as I was researching the purpose of the National Disability Forum, I realized how different it is. This is really a ground floor opportunity for all of you, whether you're here with us in the room or you're on the line, to kind of be in on the ground level of policy making. This isn't about responding to a NPRM. It's not about responding to a policy proposal. It's about informing our decisions on whether we even want to make a policy. And I think that's what makes the NDF so special. So thank you so much for being here today. Thank you for being a part of this process that is really about the fundamentals of making public policy.

They gave me talking points, and anybody who knows me knows that I'm totally uncomfortable with talking points. But they made me say most of this.

So the focus of today's program, obviously, is on the Ticket to Work program. It is a program that is designed to assist those who are disabled and want to work, or those who are disabled and want to explore the possibility of work. And both of those – those distinctions are very important because they call upon different parts of the totality of those of us who support the disabled.

The way this is going to work is – and again, the beauty of the NDF is that it's not about Social Security talking to you, it's about you bringing in fresh perspectives, new perspectives, different perspectives. I always say that the best way to solve a problem is to look at it from every possible perspective and that's what the NDF is about. It's about bringing people together with differing perspectives to help address a problem, or in this case, public policy issue.

So in a minute, we're going to be joined on the phone by Beatrice Disman. Many of you know Bea. She is the Chief of Staff to our Acting Commissioner. She'll be talking a little bit more about today's forum and the Ticket to Work subject.

What I want to talk to you about, just briefly, is leadership transition. Obviously, during any transition, there are transitions in leadership. I am a perfect example of that. I am the acting – and you can hear acting a lot today – I am the acting Deputy Commissioner for Communications and I am joined today by the acting Deputy Commissioner for the Office of Retirement Disability Policy.

And I think really the reason that we pointed this out is, although we are an agency in transition, there are some things that we will do no matter how many names or titles we're moving around on the org chart. We will be constant and consistent in our working with you, listening to you, and help – asking you to help us to inform our policy-making decisions.

Now, I'm going to do a commercial, because it is, for those of you who don't already know, and I'm sure you won't do, it is National Social Security Month. Why is that important? It's important because this is really a month where we bring folks together to focus on the totality of Social Security. That it is more than just retirement benefits. That it provides protection against misfortune, becoming disabled, certainly losing a wage earner, as I did. My daughter was on survivor benefits for four years when she lost her mom. So it's talking about how important Social Security is throughout your life or, as you've seen from our new branding, we are with you through

life's journey, helping you to secure today and tomorrow. That's my commercial, although I will do one more.

On 17th April, we are doing a Thunderclap. If you don't know what it is, Google it, but we'd ask you if you'd consider having your organization join our Thunderclap. We will be reaching over 6 million people simultaneously and asking them to come with us and take five steps towards your financial security during the month of April.

With that, I'm done with the commercials. I'm done with the introductions. I'm going to go on to logistics very quickly. We are recording today's program. So if at such time as you may rise to ask a question, remember, no personally identifiable information except for your name, or maybe the organization that you represent. Secondly, we're going to be live tweeting during the program today and that one will include photographs. If you don't want your photograph taken, please just let one of our folks know and we will make sure that we don't tweet you out. You can follow us during the program today on Twitter at ssaoutreach and you can hashtag us with the #ssandforum, #ssandforum, and you can comment, ask questions, and we have our social media team here. They'll be monitoring that and getting your questions up to the presenters.

One last thing, there is a Wi-Fi network in the room, that is provided by NEA. If you would like to use that Wi-Fi, the network name is guest, G-U-E-S-T-N-E-A. And for those of you who are participating by phone, all of the materials for today's conference are available on socialsecurity.gov. So, ssa.gov or socialsecurity.gov/ndf and you'll see a link to National Disability Forum Outreach and you should select the 5th April 2017 tab. Today's my daughter's birthday. I should remember to call her.

Okay. Last thing, I promise, after the forum is over, participants whether you're here in person or you're participating on the phone, you will get an email asking for your feedback on this National Disability Forum. Please take a few minutes. Give us the feedback. It's the way we strengthen

these forums to make them better. We're in a state of constant improvement and if we're not serving your needs, then there's no reason to have these forums. We want to make sure that we're responsive to that.

So with that, I think, I'm going to transition out of here. I'm going to introduce our Chief of Staff to our acting Commissioner, Bea Disman, has been a part of the SSA family for so many years. She has been a guide and advisor to so many of us. She served, obviously, for years, as the Regional Commissioner in the New York region. She led the Medicare taskforce and Bea has done so many things for the agency. But more importantly, she's done so many things for the American public to support the communities that the social security serves. So it's really my pleasure to introduce Bea Disman.

Beatrice Disman: Thank you, Jim and I appreciate your warm remarks. And certainly for many of us here, we have a long relationship of the mission of Social Security and really being mission-focused.

You know, Jim mentioned, this was the first of his National Disability Forums, well, this is also my first. But, I think, hearing from Jim, as the Regional Commissioner, I have certainly always been in meetings with members of the disability community advocates, as well as beneficiaries. So this continues my tradition of speaking to people involved with our program.

I wanted to say good afternoon, good morning to those on the West Coast. I wanted to thank you on behalf of Acting Commissioner Nancy Berryhill for participating in this National Disability Forum on the Ticket to Work. Unfortunately, Nancy couldn't be with you in person. She is attending a meeting that she's been at for the entire week. I'm sorry that I couldn't be with you in person, as I had to be in New York City to attend to a personal matter. But having said that, I do want to spend a little time focusing where we're going today and some other thoughts.

And so in talking to Mariana LaCanfora and talking to Jim Borland, you know, they certainly have mentioned the importance of the forums as a platform for exchanging ideas, and for also gathering information from all of you across all aspects of the Disability program. We need that ground for information. We need to have that dialogue and that communication. And today, we are looking for your input on how we improve our return-to-work efforts on behalf of disabled beneficiaries.

You know, when I saw the subject for your meeting today, as Jim noted, I do have a long history with Social Security. And I was actually there when the Ticket to Work and Work Incentives Improvement Act of 99 was enacted. And I remember the start of period and I remember doing many outreach events with employment network and various sponsors.

So I'm really excited to be with you today when we solicit input on how we might revise and improve the current Ticket to Work program to help our beneficiaries and the providers that we serve. You know, even with our definition of disability that you're all familiar with, we know that a significant number of our beneficiaries have work-oriented goals. In the national beneficiary study conducted in 2015, 45% of beneficiaries listed personal goals, including getting a job, moving up in a job, learning new job skills, or saw themselves working for pay in the next five years.

So how can we together help our beneficiaries achieve these work goals? For starters, I think, you all are aware, our work incentives do reduce the risk of returning to work by protecting eligibility for cash benefits and health coverage. Certainly, there needs to be a focus on that because certainly, a number of people are very fearful of losing both. We also recognize that many beneficiaries need the Ticket to Work program employment support to help them re-enter the work force.

Today's discussion builds on a federal registered notice we issued last year, soliciting input on the Ticket to Work program. In addition to written comments we received, we look forward to having an open and robust discussion today. We anticipate comments on the effectiveness of different employment support models, removing barriers from employment networks, changing the payment

structure, and ways to foster robust market of employment support services for our beneficiaries. As Jim and I have indicated, we want to hear your ideas. We want to hear your suggestions. I encourage a robust discussion, not just from people that are in the audience physically, but also from all of you on the phone.

So I would like – before we get to the panel, I'd like to introduce Robert Pfaff and Paul O'Leary. They'll provide a brief overview of the Ticket program and some data related to program outcomes. Rob is the Deputy Associate Commissioner for the Office of Research Demonstration Employment Support; Paul is our Senior Researcher in the Office of Program Research.

Again, I want to thank you for your participation. I want to thank you for the honesty in the suggestions that you'll be making, and I look forward to hearing from the team as to the ideas that you have presented. And please, participate. This is the reason we have these sessions to hear from all of you. You are the people on the ground, you are the people that can actually give us the ideas to move ahead with this very, very significant program for our disabled beneficiaries.

I'm going to turn it over now to Robert and Paul.

Robert Pfaff: Thank you, Bea for that introduction. My name is Robert Pfaff and I'm the Deputy Associate Commissioner in the Office of Research Demonstration and Employment Support, and I will be presenting with Dr. Paul O'Leary today.

What we are going to do is a little bit of a level set regarding the start or origin of the Ticket to Work program and the things that we've done along the way to get us to where we are, and I'm going to do that very briefly. And then I'm going to turn it over to Paul, he's going to talk about some outcome data regarding the Ticket to Work program.

So looking back, as maybe you know, the Ticket program became law in 1999 through the legislation passed. The Ticket program stipulates that our beneficiaries receiving disability benefits may use services to obtain vocational rehabilitation, employment network and other support services. The program was rolled out incrementally from 1999 to 2002, 2003, in clumps of states nationwide. So really, when we think about the Ticket to Work program, it was fully up and running around the 2003/2004 timeframe.

We took evaluation of the program, and looked at its strengths and weaknesses, and we made regulatory changes in 2008 to the Ticket to Work program. And those changes consisted of enhancements to our payments process, we reduced administrative burdens so in ENs, employment networks, and we allowed the beneficiary to assign a ticket to an EN after completing VR services. And this is what we refer to as partnership plus.

So today, that's brings us to today. And today, we're charged with discussing the possibility of additional changes, whether they be regulatory or other ideas or enhancements that you may have – be discussed in our introduction.

So the Ticket to Work program, what does it consist of? Well, if we look at Ticket to Work, our stakeholders, we have employment networks, approximately 600 employment networks nationwide serving around 61,000 beneficiaries currently – those are beneficiaries with tickets assigned. Our vocational rehabilitation agencies, we have about 80, 75 to 80 organizations nationwide that are serving about 300,000 SSA disability beneficiaries. We also have the work incentives planning and assistance organizations. We refer to these as WIPAO. We love our acronyms in the Ticket to Work program. We have 83 projects currently that are serving about 35,000 beneficiaries annually. They provide benefits counseling services to those beneficiaries. And finally, we have our Protection Advocacy for Beneficiaries of Social Security. We referred to this as our PABSS program. We have 57 state projects serving about 9,000 of our beneficiaries annually.

So that brings us to, what have we done with the program after the changes and where are we now? What is the direction that we're moving forward to? So one of these – one big one is automation. In 2015, we were successful, after many years of working in a collaborative manner, to automate our employment network business processes and really transition that away from our proprietary system that we have been paying \$2 million annually for and into an in-house system. So really what that facilitated was an opportunity for faster business processing, our employment networks can go in. They can look at their beneficiaries, they can assign tickets, they can request payments, things of that nature.

The big piece for us more recently has been the automation of the vocational rehabilitation side of our programs. So now, if you go in to what we refer to as ITOPSS, that Internet Ticket Operations Providers Support System, you will see employment network and then below that you will see vocational rehabilitation. This is a major advancement for us. We're getting away from the paper-claim environment and piles of paper claims on an individual's desk and an automated process for us to make those payments. That just occurred in March 2017.

So some other enhancements, there has been several marketing enhancements that we've made, that we're sensitive to the fact and the notion that our service providers are always trying to sell their services, or market their services, or get the attention of our beneficiaries receiving disability to tell them about the Ticket to Work program and for us, as an agency, to do the same. So in April 2015, we restarted the Ticket to Work good news notices. These notices tell the beneficiary about the Ticket to Work program. They refer the beneficiary to our website, our Ticket to Work website, and we have seen an uptick in the number of beneficiaries reaching out to our call center and to our website, to obtain more information. We also, with the assistance of our friends in the Office of Communications, were able to add a link to the Ticket to Work website directly to the ssa.gov homepage. And that has dramatically increased the number of inquiries we receive as well.

Going back to the notices, we're mailing out about 100,000 notices per month and we target new beneficiaries, those at the one-year anniversary and those at the three-year anniversary dates of receiving benefits.

So another enhancement, this is – a lot of what we do is, we're sensitive to the feedback and again, this dovetails into the purpose of why we're here today. We receive from our service providers – and this was from everybody, this was from our vocational rehabilitation, our ENs, or WIPAs and so forth – identifying an issue and some instances of being able to attain a benefits planning query. So this is a document that a beneficiary can receive and use to receive benefits counseling from a benefits counselor, a WIPA. Some ENs do benefits counseling, some vocational rehabilitation agencies have benefits counseling piece built into their business process. This is a critical document because when the beneficiary is thinking about going back to work, the first question they often ask is, 'How are my earnings going to affect my benefits?' And we need to let them know about our work incentives and that's the point of where the benefits counselor comes in and plays a role there.

So, we took this business piece internally. This takes a work load out of the field offices, although the field offices are still engaged in taking these requests and facilitating the request. But we've setup internally within our organization staff to fulfill this request from specific identified organizations. We would love to expand the number of organizations participating in what we called as benefits planning query proof of concept. But of course, we were sensitive to the timeframe and the turnaround; we have staffing limitations. But we have been able, despite some of these challenges, to produce that 23,000 benefits planning query requests since we launched this program in 2015.

One thing I want to also point out is, we also launched our wage reporting proof of concept. This is another barrier to the Ticket program. We are sensitive to our beneficiaries who are participating in Ticket to Work receiving an overpayment. And we developed internally, a process for our

contractor staff, to input beneficiary earnings into SSA systems using a faster, more efficient process. And that's a very high-level explanation of a pretty technical detailed process. But suffice it to say that once the earnings are input in this process, it triggers a notification to our field components to process those earnings in a faster way, thus, preventing the overpayment.

Okay. Marketing proof of concepts, I want to skip to the bottom bullet there. Again, this goes back to the marketing we've done as an agency aggregately, but we've also taken the considerations of the employment networks into hand as well. We developed a secure email trans-middle process to receive request from marketing data, concerning our beneficiaries. So our employment networks who participate in this process, are able to make a request for data, and that's limited information pertaining to beneficiary name, address and telephone number based on certain criteria. That could be zip code, it could be an agent beneficiary so forth.

Our folks internally run those data files one-by-one. Each request is different. And then we send that information through the employment network in an encrypted email file where they can open that information. And then they can either send a mailing to the beneficiary, or they can call the beneficiary and tell them about the services that they offer. We just launched that in 2016. And as of February 2017, 22 ENs have received marketing files through this process.

So I think that covers everything that we have. Of course, we are engaged in a multitude of other efforts, but my time is limited and I want to turn it over to Paul O'Leary, who can pick it up and tell us about some of our outcomes. Thank you.

Paul O'Leary: So good afternoon. Some of you may know me. I'm Paul O'Leary with Social Security Administration. I was deeply involved with the evaluation of the Ticket to Work program that we launched in the early 2000 and continue. I think we did our final report in – around 2013. And I want to start by just mentioning that I think one of the big outcomes of that evaluation was an

assessment of the net impacts of the Ticket to Work program. And I think that those results, in a lot of ways, have been misinterpreted.

So what we did in the evaluation of the Ticket to Work program, is we looked at what the new EN version of the Ticket to Work program looked like and what the outcomes looked like relative to the program that existed before the Ticket to Work program, which was the VR Reimbursement program. And what we've found was that there was what looked like a slight improvement in terms of the overall outcomes for people who like ENs versus VRs, but that those differences weren't statistically significant. And a lot of people have interpreted that to mean, well, but the Ticket program was a failure.

And that's not really what it says. Basically, what it says is that we have about the same rate of success in the Ticket program that we have in the VR program. And one of the important things the Ticket program does, is it offers beneficiaries new options in terms of where they get their services and the kind of services they get.

So with that, as a sort of a general background, I'm going to basically go through a little bit of what we've seen since the end of the Ticket evaluation in terms of the outcomes and little bit of the analysis of what we're seeing overtime from beneficiaries who participate either in Ticket to Work program or the – well, in the Ticket to Work program, either through an EN, or through one of the VR agencies.

So I'm going to start off a little bit talking a little bit about what the earnings capacity is of beneficiaries, because I think, one of the problems with the Ticket to Work program and the way people interpreted the effect of the program, was I think, in some ways, maybe people were overly optimistic as far what we should be seeing from our beneficiaries. Our beneficiaries go through a very rigorous process to get on to benefits. They basically have to prove that they can't work. And

then once they are there, we turn around, sort of expect them to flip a switch and start working. And so it's no surprise that we don't see that.

So this first slide, just – there's a lot here, I'm just kind of trying to make a couple of major points here. So the first three bars on the left essentially show people who don't work. This is looking at individuals five years after awarding, and what they've done in those intervening five years after getting benefits. And it's not surprising to anybody who follows us knows that, you know, roughly, 90% of our beneficiaries don't work after they come on to benefits. But what a lot of people don't know is that, of that, you've got about 27% die or retire within five years of coming on to benefits. So a lot of people who come on to our benefits are older. Many of them are in very poor health. And so it's not surprising that those folks aren't engaging in work activity. For those that do work, what we see is sort of strong outstep to the right and you see that for the most part of those who work, work at pretty low levels.

So the next slide, basically tries to get a little bit at why we don't see more people working and/or working at higher levels, levels that could eventually get them off of benefits. And what's – there's really only two main things that I want to point out here. There's basically two significant barriers that these individuals are facing, and in addition to the disabilities themselves. One is that a lot of our beneficiaries are older. So if you look at the top bar, what you see is that 61% of all of our beneficiaries are aged 61, or 50 or older.

When you break that down by the three programs, however, what you see is that most of those individuals are concentrated – the older individuals are concentrated in the SSDI program. These are people who have significant work histories and have been working for a long time. But when we look only at the SSDI program, we see that 73% of those people are aged 50 and older.

So these are people who, for a lot them have kind of ended their work life, and the disability program ends up being an early retirement program. Certainly that's not the case for everybody but, when

we think about our expectations of who's going to go to work, you've got to keep in mind that those who have the most capability for work are generally older and near retirement age.

On the flip side, you've got younger people on the SSI and concurrent programs that concurrently need both – they're in both SSI and SSDI. But when you look at what their earnings were in the period five years before they started the benefits, for the SSI program in particular, 92% of these people in the 5th year prior to them starting benefits, were working at a level that was below SGA. So it's not surprising that these people get on these benefits and struggle at getting to SGA. They weren't reaching SGA even before they started benefits.

So these two slides are really just meant to temper our expectations a little bit in terms of who participate in these programs and what we ought to be expecting.

In this next slide, I'm going to start talking a little bit about the outcomes. So I really only have two slides, so I'm going to spend a little bit of time on each of these. So let me set this up just a little bit.

What I've got here is, we're looking at people who in 2006 could have assigned their ticket to either the EN, and EN or VR agency, okay? And as we look down the left hand side – there's two panels here, the top panel, are people who could have assigned their ticket in 2006 and never did so. They may have assigned it in a different year, but they didn't assign it in 2006. And it's roughly 11.5 million people who fall into that group, okay? So those are beneficiaries who could've assigned but didn't. Of those who did assigned in 2006, 62,600 assigned to a VR agency, and 4,100 assigned to an EN, okay? Really small numbers compared to the overall population.

Now, as we look across, what we're looking at, are the kinds of outcomes that these people could achieve, okay? So when we look at the broader population, roughly 3.4% of those 11.5 million people will eventually go on to work without having signed up for services and they will work to a

level that gets them to at least one month of being suspended or termination – terminated for benefits, okay?

If we look at the end of the period in 2014, these are people who are on benefits in 2006. So we're looking at basically a seven-year follow-up period. 0.8% of those people were either in suspension or termination in that month. Now, how does that compare with people who actually have services? Well, we see that the outcomes are much, much better for the people who got services, either through a VR or EN. For VRs, 17.8% were reached at least one month of suspension or termination because of work, and 4.5% were off of the rolls in that last month of the seven-year follow-up period.

For those who assigned to an EN, it's 26.7% got to at least one month of suspension or termination, and 7.7% were off the rolls in that final month. And the column to the right of that, which is orange, looks at basically for those people who get off the rolls, if we were to total up what they forgo each month in terms of benefits – so if someone gets off the rolls in January and they're off the rolls in February, March, April, May, June, we basically add up what they would've been entitled to had they not been working, if they were continuing to receive benefits.

And what we see is that although relatively few people get to the point of suspension or termination, the ones that do generally [inaudible] period of time, and when we follow them for this fairly long follow-up period of seven years, those numbers really add up.

And so the top line to the left, where it shows 14 billion, so these people who never got services. These people, although relatively few did it, there's lots of them, so they end up generating about \$14 billion in benefits that are gone for work. This is benefits that could have been paid to them if they weren't working but they didn't have that pay, as compared to 293 for VRs and 37 for the ENs.

Because the numbers are so different in terms of the base there, it's more important to look at the averages. And when we look at the averages, we see that the sort of return on investment, if you will, for those who go to ENs or VRs, is much better. For those who don't get any services, the overall net in terms of – this is after taking into account any services that they did receive, obviously the first [inaudible] didn't get any services, but for the next two, we're looking at benefits who've gone for work of almost \$5,000 for those who went to a VR and \$9,000 for those who went to an EN. This is on average, okay?

Criticism for this sort of an analysis is that people who go to an EN or VR go there because these are people who are motivated and interested in work. So one of the things that we did is, we said, okay, so let's restrict our analysis, adjust to people who completed their trial[?] work period and basically call those people who – those who are interested and actively pursuing work, okay? And if we do that, we see that the numbers become much, much closer. First of all, the number of people who need that criteria in the general population who didn't get services in 2006 drops from 11.5 million to 362,000. And the number who need this criteria, because there's a trial work period, these are only SSDI individuals, drops to 11,000 and about 1,200 for ENs.

But still we see similar kinds of outcomes generally slightly better than those who don't get services, okay? So for overall, roughly 50% don't end up getting to at least one month of suspension or termination, compared to 52% for those who go to a VR and the 59% for those who go to an EN. The numbers, when we get to those who are off the roles in the last month observed, are much more similar, still both of those who got services are a little bit better.

When we look at the overall net benefits who are going for work, we see a similar story. Still we see that when we look at the averages, the numbers are a little bit better for the ENs and a little bit worst for the VR agencies, and that raises a point.

So what we've done is we've kind of taken away the bias in terms of people being work-interested. But the thing that we've neglected to taking into consideration is people go to get services because they think they need services and people who don't go to get services don't think they need services. So to a degree, the people who get services, if they weren't getting those services, we would expect their outcomes to be poor.

So what I do in this next slide is essentially look at what their earnings profiles look like over time. And there's a lot here but there's only a couple of things that I want to point out. One is that the two dash lines, the sort of pinkish color, are the ENs and the red dash lines are those who go to a VR. And the important thing is that both of those start off in terms of – this is looking at people who were awarded in 2001, so 2002 ends up being their first full year on benefits, okay?

And so the proportion working in that year is roughly about 40% for all three groups. But you definitely see that those who got services have lower sort of potential, in a sense, before they got services. They weren't doing as well before they started their services. And what you see for the ENs in particular is that, within a couple of years they cross over that line. So when comparing to the blue line, which represents the people who didn't get services, within a couple years, the folks that go to EN crossover and they're actually doing better than the people who didn't get services at all, okay? So the service is essentially made up for the fact that they need to get services.

For the VR agencies, it's not quite as good. We see a narrowing, they get a closer to those who didn't need services. But we have to remember, for the VR agencies, VRs cannot turn down people who come to get services from them where ENs can. So they are probably seeing on whole a much more difficult to serve population in those who are going to ENs. So, from that perspective, what we see is somewhat expected.

The other thing to point out here though is the percentages represent how many people were working, what proportion of people were working in each of this group in each of these years. And

so in 2002, we see that we're starting that about 40%, you see that the number of grows very rapidly for both the EN and VR people who are getting services. We see sort of – it's pretty flat for those who are getting – who didn't get services and basically the percentages drop over time for those who never got services, where we see a sharp increase for people who got services. And then those numbers stay up to where we were looking in the last year, for 2014, the number of people who didn't get services, only 28% of those people who are working, as compared to 38% for those are – got services through an EN, and 37% for those who got services through a VR. So you see a net increase in the amount that they're making, and you also see an increase in the number of people who are getting those – who are in the earnings, okay?

So since I only have a couple of minutes, let me just summarize with these conclusions. So the outcomes that we see for ENs and those who get VR services are consistently and significantly better than what we see for people who don't get services. This generally holds even when we restrict the population to those who are interested and serious about work by restricting the people who completed the trial work period.

When we do that, however, we see that the outcomes aren't relatively speaking quite as good, and we think that that's primarily because you've essentially accounted for interest in work but you haven't accounted for the fact that these people need services. And what we see is, over time, the services do seem to make up for that need, okay?

So with that, I'm going to turn it over to Melanie Porter and she's going to move on with the rest of the meeting. Thanks.

Melanie Porter: Good afternoon. Can you hear me okay? Okay. Good afternoon and welcome everyone to today's NDF Forum. I will briefly go over the format for today's session. We – my name is Melanie Porter and I am a Senior Advisor within the Office of Research, Demonstration, and Employment Support at Social Security.

And today, I have the honor of serving as the moderator for our esteemed group of panelists. We have five presenters today who will be joining us. And the format will be that each person will have approximately 15 minutes to present comments and propose suggestions on behalf their organization to our Ticket regulations. We will go through each of our presentations today before we open it up for questions and comments. And at that time, I'll provide further instruction on how you can submit a question.

Because we want to do our best today to stay on time, we will timing each of the presentations. And we will also provide a gentle reminder at the 13-minute mark and just simple say two minutes to remind our speakers that they should start wrapping up their comments and we should move on to the next speaker. Rene Clarke and James Everington[?] over here will be serving co-moderators assisting for those who may have questions in the audience. So if anyone needs any help, we can just refer to them as our [inaudible] for the day.

One last thing that I wanted to mention was that just because we are short on time, I will not introduce each of our speakers today. We have included full bios for everyone. For those of you who are participating virtually, you can find full bios on our website. And if you're here in the room today, we do have hard copies of those included in each of your packets.

So with that, I will briefly introduce each person's name and title so you will know who you'll be speaking from today. We have Mr Joseph Ashley, joining us from the Assistant Commissioner, joining us from the Virginia Department of Aging and Rehabilitative Services. We also have Judy Sanderson, Director of Employment Services, and we have Cheryl Bates-Harris joining us from NDRN. We will also hear from MJ Willard and then we will close out our panel with Andrea LaVant who is one of our 4tickets to our participant success stories.

So with that, I will turn it over to our first speaker. Joe, you may go ahead.

Joseph Ashley: Okay, thank you. Okay. Hello, my name is Joe Ashley. I'm with the Virginia Department for Aging and Rehabilitative Services and I greatly do appreciate the opportunity to be here today. And I also have the pleasure of being on the National Employment Network Association Board of Directors, where I serve as Co-Chair there on the Partnership Plus Committee. I do want to give you the framework from which I'm speaking today. Our agency did since submit some comments with the advanced notice of proposed rule-making. I also reviewed about six other VR agencies submissions for that advanced notice and I did review the information that we're going over today with the Council of State Administrators of Vocational Rehabilitation, SSA Relationship Committee. I think it's important to understand the frame.

I do want to say I've noticed the trend with our friends at Social Security in reaching out on the policy side and the employment support side, asking for comments and feedback. And I do think it's a good thing for all of us to do to join with them in having this kind of conversation. So I do appreciate that.

In the first slide, one of the things we were told to – we were asked to do is focus a little more about regulations. And some of the comments I was hoping to make were not exactly regulations, so we'll see how well I can spin some of these to make it seem more regulation-oriented. The first point I do want to make though is I'm going to talk about something real quick. We are suggesting that SSA, take every opportunity it has with the administration authorities to see how they can align the SSI and SSDI programs to make them simpler, look at the offsets. We think there's a lot of advantage in that and we're hoping that other people will be making more comments about to do that. And I do understand there's a tradeoff between the trust fund and finding that right amount that helps people in the offset proposal to continue to make that choice to go to work or have more of them do so on the DI side.

We would also recommend that we look at the resource limits on the SSI side. If we can increase those, perhaps some of the individuals who are going on – looking at 1619(b) work incentives, if they could accumulate more resources, might be in a better position to make the jump to going all the way off of benefits. So I think that is something that needs to be considered when you're looking at reviewing these regulations.

The next two points I want to make is that we get – a lot of times when we talk to SSA about some of the communication that goes out, we're told it's either a policy issue, regulation issue or general council issue on terms of the communication. I'm hoping that when you look through your regulations, you can find ways to ensure that things are accurate, they're clear, they're user-friendly. That would go a long way to our folks being able to understand, our joint clients being able to understand what's being asked of them. And we do still have people coming in thinking that the ticket is about maximizing benefits versus going off of the work – going off the benefits through work.

We would also suggest that SSA consider every opportunity that they have to send out a letter, or any kind of communication, to be something that's positive, supports the program goals and is available to help people make that choice to go to work in an encouraging way and not be harsh, or literally scary, in some cases. That's how some people who are interpreting that. And we think that stops people on their tracks, and we think that if we rethink some of these particular communications, we might be able to encourage more people to move forward.

We also support where SSA seems to be going these days around the administrative ENs. We think that's an excellent opportunity to increase the number of options for our clients to be able to make choices to get support in their community. And some of the smaller providers who don't either know how to or choose to deal with the administrative requirements that go along with the Ticket to Work program will benefit from using that option, and we appreciate that support we're getting.

Most of the lens – I'm talking pretty fast I think but it's because I want get through with everything. So I do apologize if it's hard to understand. One of the things that I do want to do is talk more of that Partnership Plus because that's where our agency is really big in this effort.

The first thing I want to mention is, I did see that the individualized work plan – a template came out last Friday. But one of the things that we think would smooth out this process, make it more seamless, is if the individualized plan for employment – and I know for those of you in VR who are looking at my slides on the slide, but it's individualized plan for employment. And that plan has in it an agreement between the VR counselor and the client. It also has listed, you know, the services regional goal and support needed.

Individuals have been working for at least 90 days on that plan. It does not makes sense to us to then turn around and have a new plan written, just because there are different programs. If we could find a way to take that individual plan for employment on a Partnership Plus hand off, put a sheet on the back, have the signatures on it that are required for the regulations and make that as simple as possible, then we can capture that momentum, capture the energy and make the programs work better together to support that client in their choice to go to work. So we think that would smooth out a lot of the processes. Another one I talked about is about momentum and trust in the system, and those are kind of things that help it.

The next point – next slide, James. The next one I was looking at is about payments, and it has to do with the fact that if a person exits the VR system and they are successfully employed, but they are under SGA and they go to an employment network, the Phase-1 payments are off the table. We believe that it would make more sense to the system if – when somebody – and I'm putting this in the frame of the Partnership Plus. Other people have a slightly different frame on that, but this is where we live. In a Partnership Plus arena, if we could have the Phase-1 payments put back on the table, if somebody leaves under SGA because that may be their first job, it maybe they need to

build up the standard and they need some confidence. If they had then the opportunity to go to – in an appointment network, on a handoff from us, they might – you'd might have more employment networks willing to take that hand off if those Phase-1s go back on the table. If they were being served for a second period of service in VR, we would get paid the cost reimbursement program. So I don't think there's a lot of difference in the costing on that. We think it would smooth out the programs, it would help people continue their efforts and we believe there will be more opportunities and options for our client base.

The third thing, on the next slide, I'd like to say is if an individual is being served by both systems, the VR system and the head of ticket assigned to employment network, I think we need to clarify the language around the agreements that are required. Under the new WIOA regulations on title four, we have some requirements that our VR councils have to coordinate if a ticket is being held by an employment network – with that employment network. It would be good if the SSA regulations could also support that and say that – I think the reference in some of this information is about if there's a referral from the EN to the VR agency. I think if they are being served in both, we need to have an agreement. And in that agreement, it talks about who's going to do what, how the client is going to be helped, make sure the vocational goals are aligned and how the [inaudible] payments would be split. So we think that would be a good addition.

I do also want to state – there's a technical assistance – on the next one, James. On the technical assistance piece, we in Virginia had a hard time getting our local groups, community rehab programs and center to move forward and help us figure out how to work with Partnership Plus. This is around 2008. Our commissioner, James Rothrock went out and asked our communities and say, 'We get some volunteers to help us work this through.'

As we began this process, SSA realized this – and I want to commend them for this – we were considered a strategic partner. They made some of their contractors available to us, they made Maximus available to us. And so the people who were willing to work through the process were

assured that if we had a problem we encountered or there was an issue, we got the right people on the phone or in the room to discuss it, and we came out with some program improvements. This was a forum in my mind of continuous quality improvement. In our state, we went from six Partnership Plus employment network partners, that's all [inaudible], and then we are now at 22, plus some administrative ENs.

The difference to our clients, to the individuals that we both served in our state is that it has gone from no ticket payments on the system to now, last year, when we checked, there's about \$900,000 worth of ticket payments are coming into Virginia, to these employment network partners in the state. What that means is our system is stronger, and that our clients have better choices, and VR counselors are starting to understand the importance of this process and this collaboration. I do commend SSA for putting that technical assistance in front of us. I think all the VR agencies and others, if they step forward – it needs to be in small groups because you can't do this on a large scale. But if everybody takes a turn at this, we'll this continuous quality improvement process that will – and as each group goes through it, they're going to learn something new or improve the system and then everybody will benefit from that. We do appreciate that. Rob, next slide.

Rob mentioned the BPQY pilot. I want to commend the SSA for this. This is another example of listening to stakeholders. This piece of information is so critical to people being able to move forward that it's got to be available timely so that you don't lose the momentum. You say that somebody needs a piece of paper and [inaudible] report because you really want to have the right information. You can start the discussion but you can't get very serious. And then it takes four weeks to get the information back, which is – was happening at some of the state. The people lose faith in the system, you lose the momentum.

At this point, with the team that they put together, we're getting this information – it's three – three days is a long time for us now. That means we can get timely information, keep people moving in this choice and this discussion. We think that's critical to this process, and we thank SSA for taking

the time to think that through and find a solution. We hope that they're going to be able to scale this up because it's extremely beneficial to us. It's not necessary in every state, we've learned, but where it is needed, it really makes a difference.

The other piece that I would like to say is we have – we were looking at some additional flexibility in the VR system, where we have to choose within 90 days whether to go Ticket or traditional class reimbursement. For students with disabilities in the system, that's just too soon to make an informed of choice for them, and it's sort of artificial. For people who have been insisting a long time, they might be coming through the system several times, that's a problem because we – there are some times when, us, acting as an employment network might find a better system or better wrap-around service that we could get provided, in a collaboration with an employment network, that would then put those people up to substantial gainful activity where we don't think they'll get. And at this point, we sort of stuck with the cost reimbursement, so we would ask for some flexibility.

And finally, I would like to point out about the work incentive planning assistance that Rob mentioned. We find this critical. We think the BCU folks do an excellent job with the CWEX[?] training. And we also think that that might need to be increased in terms of the resource and I'll ask somebody else to also provide some of that service. In our state, we have chosen to – CWEX available to us as well as we go through the Cornell program on work incentives and their planning assistance and benefit. And we find – this is very helpful. And we encourage these folks to go into our employment networks. And we now have 90 individuals in this state providing this resource to us.

We think that's a very good thing for our beneficiaries that these people are close to them. They can get the information they need. It would be excellent if SSA could reinforce people or employment networks that have this kind of resource on their staff, by perhaps having a bump in one of their payments, that would recognize the fact that they've gone through and make sure these

benefits – bad choice – work incentive with benefits counseling was available, readily available, in everyday discussions with these clients.

And finally, we believe in the decision–support software. We have one of Virginia that we like. There're others out there. We think they help individuals get accurate information and allow the employment networks and the VR counselors to do what they do best, which is motivation, and help clarify vocational goals.

I do appreciate the opportunity to have some comments with you all today. I would encourage those of you out in the etherland to take advantage of these ideas so that we can have a better discussion. Thank you for your time.

Judy Sanderson: Hello, can you hear me okay? Is that better? Okay. My name is Judy Sanderson. I work at Granite State Independence Living in New Hampshire. But today I'm here on behalf of NENA, which is the National Employment Network Association. We are a nationwide organization whose mission is to do training, efficacy, technical assistance and networking opportunities – I can't remember that I'm doing this – networking opportunities for employment networks and their partners across the nation.

I believe in the documents that we've supplied on the website, there is a one-pager there that gives you more information on what NENA does do. So if you're interested, it would be there for you to look at. You can also visit our website at www.nenaticket.org and we encourage you to do that, if you're not already a member.

As Joe mentioned, I'd like to give you a little overview of what how we came up with what we are presenting today. A year ago when it came time to develop comments, two of our committees, our legislated and policy committee and our operations committee, got together and spent a lot of time talking about the 16 questions. We also sent out a SurveyMonkey to all of our members to get

their inputs and we ended up with a four-page document that we did submit last year. And today I'd like to take an opportunity to go over some of the things that we submitted. If anybody is interested in seeing the whole four-page document, that is also going to be posted on our website in the public section, so you don't have to be a member to see it.

It's probably not surprising that a big section of our comment had to do with payment. And we have a number of areas that we think need to be addressed and changed to make it easier for employment networks. The first one has already been mentioned by Joe and that's the Phase-1 restriction on payments when there an unsuccessful VR closure. He referenced it in regards to Partnership Plus but it also occurs for other ENs where there may not be a Partnership Plus employment in place. And because if there's an unsuccessful VR closure any time in the past, those Phase-1s are off the table for the employment network, and that can be difficult.

There can be very good reasons why the individual needs more services this time around. They may have lost their jobs that they got through VR the first time. Their disabilities may have gotten worst. They may have gotten a second disability. They, many times, are going to need more services than just simply a little bit of support to get on to working at SGA. And for an EN, not to be able to bill for the Phase-1 milestone payment can be a difficulty because there could be a fair amount of time before the person does get to a point where the EN can't get any payment.

And another thing we would like to suggest to be eliminated, or at least redo, is the restriction on Phase-1 payments when there are [inaudible]. I think anybody who's got an employment network knows that if anybody – if the individual have worked a significant number of months, pretty good 18 months when they assigned the ticket, that some, if not all, of the Phase-1 payments are off the table. And there is some logic behind it because if the person who has been working for up to 9 months in that 18-month period, perhaps they don't need a lot of support. They might just – you know, a little support can help their benefits and they're ready to go.

But it was in our experience that, many times, that is not the case. In fact, the worst case scenario would be an individual who has been trying for the last 18 months to get to work. And they may have tried and failed and tried and failed and tried and failed several times before they approach an EN and talk about services. So not only do you have individual that really does need a fair amount of support to become successful to obtain and maintain employment, you've also got an individual who has got a pretty poor work history to be approaching the next employer with. So it's going to be even harder for that person to get a job. Employers are not going to see them as a prime candidate with, you know, two or three, four jobs in the last 18 months, they had to leave.

Another area that we would like to see changes is in how reimbursement is done for people that are just on SSI. I mean, in very simplistic terms, if an individual is only getting the SSI and they're getting the full amount, which I believe this year is \$735, that individual has to earn \$1,555 in order for their checks to stop. That's more than 30% above SGA, which, once again, that can make it difficult for an employment network to get to the outcome level of payment. And then if an individual does get to the \$1,555 and their check stops for one month, you're in the outcome payment. There's no back season in the system. You can't go back to Phase-1 or Phase-2 during this milestone. So once you're in the outcome, if that person on SSI doesn't continue to earn \$1,555 every month, you're not going get any more outcome payments, or maybe a good long time before you get any more outcome payments. That can make it difficult for employment networks.

We're aware that there are some employment networks that will not work with individuals on SSI for those kinds of reasons because there is no guarantee of when or how long it's going to take to get reimbursed with the services that you're providing. And you are proudly providing significant services.

The last thing that we wanted to note that would be good to look at is PASS Plan. PASS Plan can be a real benefit for many individuals. And we encourage the ENs to help people develop PASS Plan. The catch is if somebody is on a PASS Plan, their benefit checks don't stop, which means

that you've immediately impacted reimbursement for EN. So we are recommending that somehow that be looked that so that ENs might still be able to move on to outcome payments, even though somebody has a PASS Plan that is really a benefit to them.

One thing I do want to mention here is that all of these changes benefit the employment network. And at NENA, that's something that we're focused on. But it will also benefit all of the beneficiaries too because it will allow ENs to consider working with a much wider array of individuals because they won't have to worry about whether or not they're going to have the income coming in to pay their bills every month. It is not just a benefit for the employment network, it's also for the ENs.

Addressing – one of the other areas that was listed on the 16 questions with barriers to working in Ticket to Work. And we have several of them that we wanted to bring up. Rob did a nice job with the marketing regarding the POC that is currently in place. I am fortunate that my agency is in the POC, and we have been able to now start doing some marketing ourselves for our agency. And I want to commend Social Security because they really did listen to those 22 of our ideas, our recommendations and they made changes to the POC, which are now going into effect, so that we are going to find it even easier to do, for those of us there in it.

NENA strongly recommends – we understand that there are issues with rolling this out across the country, but we strongly recommend that that be a focus, that all ENs will be able to have access to this information so that they can market in whatever way that makes sense for them.

We also want to have it left on the table the concept of this information somehow being able to be accessed by the employment networks through the portals, whether it's the secure portal that we currently have or another portal. That would make it much easier for employment networks to really have flexibility in how they get the word out there on what their services are and what they can offer the individual.

Another thing we want to bring up is for individuals that are on SSDI, and they have children, their children frequently are getting a benefit based on their parent's account. Now, for some individuals, when they want to go back to work, it can be difficult for them to even consider: how much am I going to have to work in order to make up for my check? If you add in to the fact that: I have to figure out how much I have to earn and not only make up for my check, I have to make up for the checks of my children, because the minute that parent's check stops, those children's checks are going to stop too. So it can be major hit for the family. And it may be enough that the individual just can't consider going back to work yet because they can't – they won't be able to work enough or earn enough at first to make up for that. And it's more than what the family budget can afford. So we would like to recommend that some thought be given to the children not losing their checks when their parent's check stops. Maybe it just goes up to the point where the parent actually terminates from benefits and then the children checks would stop. But some flexibility there would make it much easier for some parents to consider going to work. My experience has been that some of these individuals have a significant work history and have the ability to be quite successful, but they can't take the financial hit.

Another thing that we have run into across the country is there are times when VR will close somebody and obviously that has the work of the system and be in the portal before any EN can assign their ticket. We have run into occasions where sometimes it can take three, four, five months for that closure to show up. And that obviously is frustrating for everybody involved but it also jeopardizes – the beneficiary is in jeopardy because if they are getting protection from the medical CBR, they've got 90 days from when VR closes them to when those protections stop. They need to get reassigned within that 90 days. And if they don't, they lose that protection and that can be an issue. So we need to look at why is that happening, why is it taking time for some people to show up as closed and can be assigned.

I do mentioned here field staff training, although we heard that that's not particularly a regulation thing, but we do want to – we have heard from some of our members that they are seeing definite improvement and they just hope that continues.

Collaboration. NENA strongly believes in collaboration between agencies. We particularly mentioned Vocational Rehabilitation because they are an active member of NENA. And we believe strongly in Partnership Plus and think that whatever efforts can go into making that more of a nationwide process that is common everywhere, that would be wonderful. We also support Joe's comment about developing effective payment models when services are shared. I mean, it's only fair and it's going to help the beneficiary. I don't have to say this to somebody, "No, I can't serve you any longer because you want to go to VR." It'd be nice if we have some other option in there. I don't want to have to un-assign somebody's ticket because now they need some services that VR can offer, if there is still something that I can offer too. And we also support Joe's comment about being able to reselect the ticket designations for individuals that they are serving in the VR system.

I do want to mention that NENA is also very active in terms of working with the AHACs. We have had trainings on Partnership Plus. We think – and on the AHACs, we've had lots of information out there at our annual conference. The collaboration is vital in order for us to continue to provide good, strong services for the people we're serving.

There was a question on – out of 1 of the 16, about the providing of ongoing support services and whether or not additional things should be added into our contract, in terms of what EN should supply. Our one recommendation in this area is that it needs to stay flexible. If we end up with a list of – you know, we need to A, B, C and D for everybody that is getting ongoing services, it may not always fit. Some of the individuals we serve really want to be independent. They don't want to feel like somebody is watching over them. They do feel – they do want to know that we're a phone call or an email away. That is very important. But they don't want to have to do certain things in order to stay in the program. So we just recommend that whatever ongoing services are considered

that it'd be as flexible as possible to meet the various needs of the different beneficiaries across the country.

Increasing beneficiary participation. We think one of the things that would be – in addition to the marketing, which will help increase beneficiaries coming in and the POC in getting the information, we also would recommend – and Joe referenced this also – simplifying the Good Newsletter. It now goes out as a three-page document. There is a lot of really good information in there. It's just – it shouldn't all be in one letter. It's too much for many people because, I mean, there's a whole section on [inaudible] information, which is great stuff. But I think if you're trying to mix it in with getting people interested in the Ticket program, maybe it could be a separate letter or put on the website or something.

We actually submitted a one-page idea to Social Security in terms of – this would be a great Good Newsletter. It's only about ticket, its one page. It will probably cost you a lot less per month, and we think it would work better. People wouldn't get confused trying to get through three pages of the document before they figured out what's going on. And then I'm going to just reemphasize the fact, understanding the marketing proof of concept so that more ENs have it accessible to them.

I think I am going to stop there. My information is at the very end. Anybody, please free to contact me. The NENA contact information is also there. I'll be glad to talk to anybody about these ideas or about NENA. Thank you.

Cheryl Bates-Harris: All right. Well, thank you. My name is Cheryl Bates-Harris and I work at the National Disability Rights Network, which is the protection and advocacy membership organization across the country.

So I'm probably coming at this from a slightly different perspective. Right up front, people don't come to us and tell us what a great and wonderful job we are, or anybody else, is doing. We hear

about the problems. So just kind of understand that that's where I'm coming from. And I want to thank Social Security for the opportunity to speak.

So we all know that the Ticket to Work and Work Incentives Improvement Act was about improving opportunities for services and improving work incentives to encourage people to try to work. And I'm all about work because work is part of the adult expectation that people are going to go to work.

But from a civil rights perspective, there are some issues with the structural design of the Ticket to Work program, particularly with the employment networks. While we understand that choosing to receive services is voluntary, and choosing to provide those services is voluntary if you're on employment network, a lot of it is still based on a very outdated medical model with stereotypic assumptions about what people can't do. And we continue to hear that employment networks will tell people that their job expectations are not realistic or they are not ready for work, which can be extremely discouraging to a beneficiary who's motivated; otherwise, they would not be seeking services.

But the real problem and the real concern that we have is that, oftentimes, the employment network are delving into questions and backgrounds that if they were asked by an employer would violate the ADA. And again, this is problematic when that information is being used to deny a service to an individual. We would like to see some stronger language around non-discriminatory practices and non-discriminatory information because we don't know that all of the employment networks, or even the VR agencies, know how to properly protect that information.

So the process of the ticket is all about finding vendor that will help someone go to work and reduce their dependency on benefits. But choosing an employment network can be a daunting process. We have a lot of employment networks that are out of state, that have 800 numbers, that are only available by the internet or access, and people aren't able to talk to a person or to a voice.

So they're a little concerned about, will this employment network really be able to provide services to me? So we really think that what needs to happen is there needs to be a better marketing campaign, a social marketing campaign that is not based only on the internet. People with disabilities and families with family members with disabilities are among the poorest in the country. They don't necessarily have access to the latest technology, the fancy phones or the internet services in their home. So right away, they're at a disadvantage in terms of seeking services.

So you can't rely on the internet. We believe that there needs to be simple, printed, bold information that's readily available in the places that these individuals will be found; in churches, library, community centers, schools, and even Social Security offices. People are going to the Social Security office already; that's the perfect place to have information so they know about alternatives.

I want to focus for a minute of SSI kids. I understand that legislatively, ticket-eligible, you cannot be eligible for ticket under the age of 18. But when we have over five million children on SSI benefits, there needs to be a focus there. These families and these individuals need to know that work is an expectation of adult life and that the services and supports need to be consistent with IDEA. We educate children to prepare them for adult life with the Rehabilitation Act that requires transition plans and services in place, as certainly with the Workforce Innovations and Opportunity Act, which requires that 50% of the funds be made available to youth. To exclude this population from the Ticket program is doing a major disservice to the SSI kids.

So we also believe that the Ticket needs to be redesigned in a way to really meet the needs of individuals with intellectual and developmental disability. Families are the key decision-makers when it comes to their children and whether or not their children are going to participate in services or whether or not they're going to go to vocational rehabilitation. And families also have access to those hidden job markets that are not found in the classified ads that are not necessarily made by contacting lots of businesses. They know who their friends are. They know who their relatives are. They know where they work.

So families are the decision-makers. And there was recently a documentary released by Rooted in Rights from the Washington Protection and Advocacy Agency that exemplifies the employment opportunities and the employment capabilities of kids with significant disabilities, in spite of the helping professionals. Many of the stories in that are because the family persisted, because they were consistent in their efforts and consistent in their goals, and rather than because of helping professionals. So if families can do it on their own, they should certainly be able to do it with the assistance of the Ticket program and the helping professionals who are being paid.

We also believe and know that there needs to be much better coordination with community-based organizations and programs to blend the funding and to blend the opportunities. Again, going back to, we don't hear the great and wonderful things about what's happening out there. When I travel around the country doing training in multiple states, I continually hear from providers, community-based organizations, that they can't get VR to work with them, or they're trying to figure out how to develop an agreement or an arrangement with vocational rehabilitation. And we believe that it existed in the partnership program in the 2008 regulations. So we need to find a better way that programs and providers can work together and provide complementary services rather than do it as a competition. There's plenty of work out there to go around, and we need to figure out how to work so that we can complement each other and work together rather than compete.

So again, we can't talk about employment support without talking about the fact that employment supports do not exist in a vacuum. Management of the program is critical, particularly with regards to the work incentive that we promote to help people decide to choose work. And oftentimes when they choose work, choosing work backfires and has negative, detrimental effects on them. We understand the Social Security has staffing shortages and their staffing levels are lower than they've been in years. But that's no way to run a work incentives program. There are a lot of problems when the individuals go back to work. To talk about reporting requirements, reporting their wages, documents and brochures will say you need to report your changes by the tenth day

of the following month. Individuals, time and time again, come back to us where they have reported the changes and yet they are told: Don't do it this month, do it at the end of nine months. There's no consistency in the requirements of how wages are reported and how they're processed in the local Social Security offices. And it is a huge problem because urban myths fly high. And when the myth on the street is, if you go to work, you're going to owe Social Security \$16,423 and please remit in an enclosed envelop or give us your MasterCard number, people are scared to go to work.

So, again, this is an issue that needs to be addressed. There has to be adequate infrastructure to staff the program and operate it properly. Also, in terms of reporting information, the SSI beneficiaries are reminded on an annual basis to report their changes and to report their earnings. But that does not happen with the SSDI population. And we know that people will work for some months, not work for a few months, and go back to work. So there needs to be regularly – regular reminder. And again, there needs to be clear, established procedures on how the report should be made and how they will be reported. Paperwork gets lost all the time. And the paperwork needs to be entered into the system.

When I was a member of the Ticket to Work and Work Incentives Advisory Committee back in 2003, we saw a demonstration of an electronic system called eWork for wage reporting. And I was really, really excited because we thought that five years from that point, we are not going to be addressing overpayments. And in 2005, when the Social Security Protection Act required wage receipts be given to beneficiaries who work, we're like, this is it. They're going to get receipts, the overpayments are going to go away. And yet, we continue to hear all over the place that people are bypassing the eWork system and establishing other shortcuts to get the information into the system, if we're lucky. So, again, information is not properly processed by Social Security and overpayments pose a huge financial hardship to people with disabilities. They don't have the money to pay it back. They don't have the resources. And it's a continuing threat to the solvency of the trust fund.

So basically, the other piece is that there still continues to be a deficiency in the information of complex work roles; unclear directions on when to report, how to report and all of the complexity of the work incentive. The work incentives need to be simplified. Absolutely, it needs to be simplified. There are ways to do it.

And I think probably the other disturbing part about the Ticket to Work is one of the huge work incentives was the expedited reinstatements – the promise that if you were no longer able to continue to work, you could quickly notify the Social Security office and get reinstated to benefit with a provisional benefit while they reassess the continuing disability review. And yet, the payment center has a huge backup of expedited reinstatement payments. The payments are not coming quickly. They will come for a period of time and then inexplicably stop. And that leaves people sitting high and dry and extremely frustrated because the one promise was if you try this and you go back to work, we will make sure that you will not again become impoverished before your benefits can start. And so we're not keeping the promise of the Ticket to Work Program.

So that's – thank you.

MJ Willard: My name is MJ Willard and I was asked to talk about the ticket regulations from the perspective of an employment network. I'm affiliated with four employment networks. One is National Telecommuting Institute and we work with people who have physical disabilities, who have chosen, or because they need or require home-based work. And so we train in place about 500 beneficiaries each year into home-based call center or tech support jobs.

Now, the other three employment networks that I'm affiliated with are all using some variation of the client-directed services model, the CDS model. And for those of you who are not familiar with it, it's a model where we focus on people who have indicated that they're going to find their own job. They're capable of doing it and they know what they're going for, or they have already found

their own job but what they're seeking from these ENs are work-support payments. They're looking for support in helping them maintain that job.

The rationale behind the CDS model is that if you've been unemployed for years and you are going back to work, you're going to encounter all sorts of challenges. And some portion of those challenges can be addressed with money. And if you don't have it, you're not going to address them. And it's things like, how am I going to get to work when my car is on the very tail end? And if it breaks down, I'm going to lose my job. If my mother has been babysitting for my kids and she gets ill, I'm going to need the money to pay somebody to step in for a few weeks and help out until she can take over again. I'm going to perhaps need some clothing to go to work. I've never had business clothing in five years. There's a whole host of challenges that go hand-in-hand with going back to work. And some of them can be addressed by money. And so under the CDS model, part of the ticket payments are shared with the beneficiary.

Much of the 2008 regulations deals with incentives for state VR agencies and employment networks. I want to talk first about the outcome payment system. As most of you know, if you're an EN and Suzy becomes your consumer, and Suzy is able to go back to work and maintain employment for 36 months, your EN can receive approximately \$28,000, which is a hefty sum. If Suzy was on SSI, that same amount can be distributed over five years. What I find interesting is those payments are level-funded through the entire three-year or five-year period. And yet the challenges confronted by Suzy are probably clustered toward the very front end of the process. We see this at NTI all the time. We sort of have a saying, if you can get them through the first three months, the attrition drops dramatically. I think this is something both rehab agencies are very familiar with. They won't close a case until at least 90 days after employment has begun. I was talking to Dave Stapleton, who has done much of the research on the Ticket to Work evaluation, and he also said – he commented on the charts which show tremendous drop-off during the first three months or so. That's when you have a lot of people who are trying a serious attempt at work and yet they are not making it. They are failing and losing the jobs fairly quickly.

What I'm going to suggest is in a cost-neutral fashion, you frontload the outcome payments. You basically make the payment amounts sort of match the curve of the drop-off rates for beneficiaries over time. If they're dropping off most significantly at the beginning, in the first three months is where you want to have larger payments. If those beneficiaries are on a CDS model, that means they're going to receive the biggest share of the payments during the time at which they are experiencing the most significant and intense challenges. The fact that to make it cost-neutral, you're going to have to drop very low the payments in the middle and the tail end of the three to five years really is not terribly important. After the first six months or so, most people will have worked out a system of management to handle most of these challenges. It's at the very beginning which is really problematic.

There are some interesting research, two particular studies that I want to mention, that demonstrate why the sort of assumption that getting off benefits is almost sort of like crossing the finish line because it takes so much effort to get people to the point where they do leave the benefit roles. However, it's not the finish line. You know, in 1991, there was a study where they followed beneficiaries for 10 years and they basically found that beneficiaries leaving the rolls, 66% went back on the rolls. What happened to those 66%? Well, about half of them made multiple work attempts and eventually got off for the duration of the 10 years. The other half may have tried but they never got off. So it was their big work opportunity, and if they missed it, that was it.

David Stapleton did another study in 2010, the same sort of longitudinal study, and found a very similar pattern. About 62% went back on benefits. The point I'm making is that there's a lot of struggling going on after you have gotten off benefits. And there's a lot of failure. And therefore, there is much to be thought about in terms of shifting the payments to the portion of the struggling in which you're going to get the biggest bang for your buck.

Milestone payments. Milestone are already frontloaded to some extent. And I think that's the acknowledgement that it's hard to go from no work to a fulltime job. And many people are doing part-time work. I'm still going to recommend that those payments potentially be modestly frontloaded even further. And there's a couple of reasons. One, for an employment network, the cost of getting someone into trained and placed into a part-time job is exactly the same of getting them trained and placed for a fulltime job. And yet, the payments are 20% of what you get if somebody goes fulltime. And so there is a disincentive to ENs to take those who come to you and say, "Well, I want to get off benefits but I want to start with part-time work." There's less of an incentive to take on that consumer and go all-out on their behalf.

At NTI, we do both fulltime and part-time and we know the costs are exactly the same. Now, from the government's perspective, does it make sense to frontload the milestone payments even a little bit more? I would argue yes for a couple of reasons. One, all the evidence is that people who work part-time are much more likely to proceed to full-time employment if they have that recent earning experience. And so it's a probability game. But you also need to take into account the fact that part-time workers are paying taxes. They are paying into the social security fund. They are reducing – their wages are reducing their SSI Benefits. And when you take all of these contributions made by beneficiaries who are working only part-time, it somewhat offsets the fact that they've not gone completely off benefits, but they are making a contribution.

I was told that I really needed to focus on regulatory issues, which I have, which is the payments and the sort of schedule – the distribution of the payments over time. But if I had a few more minutes, I could address a big picture – one or two big picture questions, such as those that were released in the federal register. And one of them asked, how can the Ticket program attract more organizations to participate as employment networks? From my perspective, it's not how can you attract more, because frankly, a relatively small group is doing the majority of service providing. They have the majority of the tickets. There are a lot of people out there that signed up and never

get any tickets or get a handful. And frankly, this was not really their game but they didn't know it until they got into it.

But there is a population out there that I think is – there would be enormous synergy between the Ticket program and between the AbilityOne program. I don't know how familiar you are but in a nutshell, the AbilityOne program has been around since the 1930s. And the government has set aside – at this point it's about \$2.3 billion worth of federal contracts – every year that amount goes through the program – federal contracts which can only be performed by contractors who have a direct workforce, at least 75%, people with severe disabilities doing that work. According to their website, they – the AbilityOne program currently employs 45,000 people with severe disabilities on government work. It pays well. It provides good benefits. The AbilityOne program has a lot of jobs. The Ticket program has a lot of severe – people with severe disabilities who need employment. Last time I checked in, a few years ago, fewer than half of the large contractors had even signed up for the Ticket program. And in fact, last year, the program – the AbilityOne program got a lot of bad publicity because there were whole questions about, are they really hiring the target population?

Well, the Ticket program has the target population. And with this recent proof of marketing program, they have also the means to bridge the AbilityOne contractors' need for workers, with an easy way to find people within the disabled population that can actually hold those jobs. So for example, if a contractor says, "I have four facilities in these locations," the Ticket program has the ability to say, "Give us the zip codes and every month, we can send you lists of people on benefits who live within commuting distance of your work facilities. It's going to be – we're going to make it easy for you to reach out to them." The easier it is for these contractors to find our population, the more likely they're going to get hired into these government work jobs, which again pay well. So that's it. Thank you so much.

Andrea LaVant: Okay, let's see here. Can I be heard? Okay. Wonderful. Good afternoon, my name is Andrea LaVant and apparently I am a success story, the Ticket to Work success story, which is interesting because I don't necessarily feel like my story is unique. My experience as a woman with a disability is quite similar to my peers, I feel. I was raised in a great home that valued work ethic and making a difference. My parents groomed both my sister and I – and my sister does not have a disability – with the same principles. My mother, with some serious love in her heart, would often say, "Well, when you turn 18, I don't know where you're going to go but you got to get up out of here." That was – and so, you know, years later, I learned that my mom actually didn't necessarily believe that was – that I would ever gain the support to live independently but she never told me that. And so to me, my goal remained to pursue college and a career that would be bring me fulfillment.

And so at 16, I was connected with my vocational rehab counselor in high school. And her name was Vicky, Vicky Wang. And I'll never forget her. She would be the one to facilitate a portion of, you know, receiving funding for college and money for my first adaptive vehicle and ultimately connected – basically stayed with me through the process of working and getting full-time employment. So I did go away to college. At that point, when I turned 18, I became I recipient of SSI, which was incredibly helpful for me in my day-to-day needs because while most of my friends were able to kind of have the typical college retail type jobs, that didn't particularly work for my physical needs. So SSI was helpful for that. And Vicky and I, you know, continued to work together throughout my college experience. You know, and I heard the term, you know, Individual – the IPE and things of that nature. Following college, I decided to serve four years in AmeriCorps member in Tennessee and that was great because it allowed me to keep my SSI. And that was when I passed into Medicaid to provide my personal care services, which are – which I need in order to literally get out of bed in the morning and do what I needed to do.

So at that time, that's when we really started talking about my, you know, goals and what I wanted to do. I was a PR major. Had really connected with the idea of working in the non-profit sector.

And so that's where I looked. And what was great was, even though – I pursued – after that time period, I started to look for a job actually in BC, in the nation's capital, after I had done a visit here. And after applying for and accepting the offer, I realized that my private insurance was not going to pay for my personal care services that I would need in order to maintain my employment. And thankfully, that's when I learned that I could still go to work and receive Medicaid through what I now know as 1619(b). I didn't know that at the time.

So if we were to fast-forward years, I've been in the area now almost a decade. I live in Maryland, I'm a Maryland resident, and have, you know, connected – as soon as I moved here, connected with the [inaudible] here. And really, I went to this – I literally went to the Social Security office the day that I moved here, you know, to let them know. So I've had three fulltime jobs, all focused in development leadership and obviously, have really been able to maintain those – and to maintain my independent life because of the support that I had transition to work.

You know, when we think about – you know, we're making comments in terms of improvement, the interesting thing is that although I've heard things like, you know, individualize, you know, the plan for employment and stuff like that, I never actually heard you're enrolled – you're in this program called Ticket to Work. It wasn't communicated with me in a specific way. It wasn't until started working in disability that I understood, okay, that this is what I was a part of. The other thing is that, even though to – I think it was Cheryl's point earlier – even though, you know, Vicky told me to make sure to go to my SSI – my Social Security office right away to let them know, okay, you're working full-time, I still – and I did that, I still ended up having an overpayment because it took a while. And I didn't know I was – what? – 24 at the time. At that point, I'm like, well, they're still giving me money. They didn't tell me that I – you know, that I went and told them that I'm working and they didn't say, okay, hold it, don't spend it and so I was still getting it. And then, you know, months and months later, I received a letter saying that I had to pay it back.

So in terms of the kind of that aspect, that's just – the honest part of, you know, where clearly there's room for hopeful improvement. But obviously I'm grateful for the opportunities that I've had to contribute to society, as I have because of Ticket to Work, so thank you.

Melanie Porter: Okay, on behalf of Social Security, I just wanted to thank all of our presenters today for putting together their very thoughtful comments and sharing them with us today. So without your input, we would not be able to make improvements. It's been invaluable and so we wanted to thank you again. And now I'm going to turn it over to Jim Borland for a quick announcement before we open it up for questions.

Jim Borland: So I want to thank – I too want to thank our panelists. Most of all, I'm standing up here because I want to thank you for being right on time. We have about 15 minutes left. If we run a little bit over, I'm going to ask your indulgence. If you have to leave, obviously, you have to leave. Those folks on the phone, we are going to go a little bit over and it's largely because of people like me who are acting and who are still trying to figure out how to run one of these things. So with that, I'm going to turn it over to Renee. She's going to start out with some questions that we've received during the forum on Twitter. And if anyone in the audience has questions, comments, throw your hands up and we'll have folks with microphones come to you. Thank you.

Renee: Hi, everyone. We receive a question from Lisa Wilson. Lisa asked: if the beneficiary is a Ticket to Work participant through VR, do they receive the same protection? While all VR participants aren't Ticket to Work participants, those who are have protection from medical disability reviews if they're making appropriate progress. This is the only question we've received so far. I just did want to give Joe the opportunity to speak, if you wanted to add anything. If a beneficiary is a Ticket to Work participant through VR, not through an EN, do they receive the same protections?

Joseph Ashely: If the question is, if a person participating in VR has their ticket assigned to VR, yes, they do get the same protection. I understand.

Renee: Thank you, Joe.

Joseph Ashley: If you're an employment network, they would, of course, have the same protection.

Renee: Thank you. Does anyone in the room have a question?

Sherman Gifford: Hi, my name is Sherman Gifford. I'm with the Choice Group in Richmond, Virginia.

And thank you very much for the opportunity to ask this question. I'd like to commend Rob and the team in Social Security. There have been huge improvements over the last few years, it's amazing. And there are still some things that we can do to improve. And Joe had talked about timely resolution of issues and keeping the momentum going. And I would really like to encourage you to look at some way that we could implement something like an AWIC program for other issues just so we can address issues that come up that are not really work incentive issues. We have access to the AWICs. In Virginia, they do a wonderful job but there are issues we're running into with training and so on at local field offices there are beneficiary getting inaccurate information. They're getting – we've seen a huge surge in cessation and termination letters and spend a lot of time dealing with that. It could be wonderful if there was somebody that we could have a contact person at Social Security to fast track these for those folks who were impacted negatively as they're trying to go to work.

And the other thing is we've talked with Rob about trying to nail down those CDR dates. We have people who we have assigned their tickets and they think they have protection, and find out that several months previous, there was a CDR initiated in the system. And they end up going through and sometimes they end up losing their disability benefits. And that puts us in a very awkward position when we've committed to them to work with them with these protections. So that's it. Thank you.

Melanie Porter: Thank you. We'll alternate between questions in the room and, operator, if you could give the cue on the phone for anyone who may have a question.

Operator: Yes, ma'am, absolutely. If you'd like to ask a question over the phones, please signal by pressing star one on your telephone keypad. If you're using a speaker phone, please make sure your mute function is turned off to allow your signal to reach our equipment. A voice prompt on the phone line will indicate when your line has been opened. If you would just state your name before posing your question. Once again, that's star one for any questions.

And we did have a couple of callers on the phone lines, ma'am, if we'd like to move to those.

Melanie Porter: Okay, yes, please.

Operator: All right, we'll take our first question. Please go ahead.

Melanie Porter: Hi, your phone may be on mute.

Speaker: You are right. Thank you. My question is in terms of the WIPA projects and the CWIC staff. I work in the disability community and know many, many people who are interested in going to work but just need to know a little bit more about benefits. And what we're hearing from the WIPA projects is we don't have the bandwidth to just give out general information. The only people we can talk to are those folks who are actively applying and looking for employment. Is there any way we can get more funding for the WIPA projects?

Robert Pfaff: So, Melanie, I can address that a little bit. We've trained a call center to address general inquiry questions that are received and to help triage the beneficiary to the right service provider. Part of the challenge was when we re-competed the WIPA projects, we built a business model that was focused more directly on providing services to those beneficiaries who were most ready to

return to work. So the difference that we have now is if you have general questions about Ticket to Work, what is Ticket to Work, what are the services available, etc., we try not to have those folks go to the WIPA unless we know that they're engaged in working, they have a job offer, etc. We try to answer the general programmatic questions through the call center and then triage them accordingly.

Speaker: Thank you.

Melanie Porter: Operator, we'll take the next question.

Operator: All right. Caller, please go ahead.

Sam Litz: Hi, my name is Sam Litz. I'm representing a task force of the National Council for Independent Living, NCIL. Mr. Pfaff specifically asked me to make a – it's not a question actually, but a comment – that Mr. Pfaff specifically asked me to present this comment for the record. We had spoken to Mr. Pfaff previously. It is regarding a statutory change but Mr. Pfaff said he wanted us to comment anyway. It's not regulatory, it's statutory. Regarding the 1999 Ticket to Work Act and the MBI language, the language that authorizes Medicaid buy-ins in the Ticket to Work Act. Currently, the language terminates MBIs at age 65 and the NCIL task force is asking for a policy change to conform to MBI authorization language in the Balanced Budget Act of 1997, which eliminates that termination age at age 65. So I'm just submitting that proposal, as Mr. Pfaff recommended, for the record.

Melanie Porter: Thank you –

Sam Litz: Yeah, thank you very much for giving me the opportunity.

Melanie Porter: Thank you. We appreciate your comment. And I know that we have some more questions in the room and I'm visually impaired, so I will miss you raising your hand unless you're standing up and dancing. So if you could just walk to the microphone. If you prefer, we bring it to you. That's not a problem; just let us know.

Tom Scheurich: Tom Scheurich with Maryland Division of Rehabilitation Services, and I'd like to second what Sherman here mentioned a moment ago. I'd like to, you know, compliment Social Security on a vast improvement in the Ticket program over the last 15 years or so, from the first iteration of the program rates. And my question is in regards to the program rates and that is, can you give us an idea of the timeframe moving forward? And also in the current regulatory environment, given the President's order, how that might affect the implementation of rates? Thank you.

Robert Pfaff: Well, we happen to have OMB in the room, so. Do you want to wait? Would you like to make a comment or do you want me to just speak in – okay.

Speaker: [Inaudible] out there, so the [inaudible] around change that I'd like to see in this program and it will be, you know, continuing to engage you to drive this forward.

Robert Pfaff: Melanie, I think we can take some more calls from the phone.

Melanie Porter: Okay, operator, could you please provide the prompt again for questions on the phone?

Operator: Absolutely. Ladies and gentlemen, as a reminder, that is star one for any questions. And we'll move to our next caller.

James Turner: I think it's me. This is James Turner from LINC Center for Independent Living. We have – we understand there's a bit of work in signing 1999 but the employment rate for people with disabilities in America is still abysmally low. And we understand that the nature of the Ticket to Work and the policy there is very strong, but we're curious to know what SSA – how they may play a more affirmative role in identifying the two primary causes that we know with regards to the unemployment rate for people with disabilities, one being transportation and two being the abject bigotry and bias that workers with disabilities face across the nation. So we're curious to know what role the Ticket to Work might play because we know the Ticket will never really fire on all cylinders until these very important questions are addressed.

Melanie Porter: James, your phone was cutting in and out, so it was difficult to hear you. But was your question – are you asking, given the unemployment rates for individuals with disabilities, how Ticket to Work could help with that? Is that your question?

James Turner: Well, we've identified –the Independent Living movement have identified the two primary causes for disability unemployment in America, transportation being the first one and then the second thing being bigotry and bias against workers with disabilities and applicants with disabilities. Do you understand that a Ticket will never really succeed when we address these issues? And we're curious to know how the SSA may play an affirmative role in ending the bigotry and bias that applicants often face.

Melanie Porter: Would anyone like to translate that?

Robert Pfaff: Well, I think – and I would turn it over to Cheryl, if you have some thoughts on that.

Cheryl Bates-Harris: This is Cheryl Bates-Harris from the National Disability Rights Network. And my Executive Director says discrimination is our business and business is good. So it's something that we are constantly combating. But when you talk about transportation, less than 55% of this country

has any form of public transportation and yet people find ways to go to work. Once they get employed, they car-pool, they'll see somebody walking, they'll pick them up. A few years ago, when Walgreens opened their distribution center in Anderson, South Carolina – I always get these north, south, east, west states confused – there was a lot of concern about requiring overtime and people wouldn't have transportation. And yet it's worked out amazingly well because natural support stepped up and stepped into the plate. So I think that we can't diminish the effect that once we get somebody into employment and they're viewed as just another worker, and not another worker with a disability who needs special treatment or needs special something, that the employment rate is going to increase and people are able to maintain employment. I don't know that that answers your question.

The other thing, and I just have to say this because it's a pet peeve of mine, it's not that the unemployment rate of people with disabilities is so much higher, it's the lack of workforce participation. Less than 25% of people with disabilities are in the workforce as opposed to 75% of their non-disabled peers. And again, I really believe that that goes back to attitudes and stereotypes about what people with disabilities can't do, rather than what they can do. And so that's why I think it's really important that we start with youth and particularly that 15 to 18 age bracket. Get them before unemployment is a lifelong cycle for them.

Melanie Porter: Thank you. Do we have any other questions in the room, before we move back to the phone?

Speaker: Yes, Melanie, we have one.

Speaker: I think we – hang on one second.

Patrice McQueen: Thank you. Good afternoon. My name is Patrice McQueen, I'd like to direct this question to either MJ Willard, Judy Sanderson or Joe Ashley. You guys are participating in at least

one or more of the proof of concept that we're – we've initiated in the – in Social Security. And I wanted to know if there was any experience that you could share for the benefit of other ENs who might be looking to participate or are not sure exactly what we're offering just yet. If you had any experience that you could share.

Judy Sanderson: Hi, this is Judy Sanderson. I'm Granite City Independent Living and we are fortunate in that we are participating in all three of the POCs. The first one was the BB and the ability to send in a request to a central location. And almost before you walked away from a fax machine, it was back. That's gotten a little bit longer now because more and more agencies are signing on to this project. But even so, as Joe mentioned, maybe three days, and that would be a long time. It is a tremendous help, particularly if you have got somebody who has just gotten overpayment notice and is absolutely panicking, or somebody who's had a job offer and is also absolutely panicking. That kind of information – a WIPA person, no matter how well they're trained, can't do much without those pieces of paper. So it's extremely valuable. I have not heard of one negative thing about it from any of the agencies that we have, that are NINA.

We are also in the marketing POC. We had our first – we do robocall and we had our first files back in November and we did it. And we had an increase – from the number of contacts we were getting and that actually ended up the assigned tickets, we had just from that about a 30% to 35% increase from the robocall. So we definitely see that it's been successful. We look forward to getting our next files of names so we can follow up. And know that we're also in the paced up POC. But we haven't actually really been participating yet. There's a training that we're supposed to go to first, before we actually kicked that into gear. But we really are looking forward to that one because of the fact they can reduce the number of overpayments. So that's going to be huge to the people they get in touch with us and say, "I've got this letter from social security, they say I owe them some huge amount of money. How did this happen? You know, they kept sending me the checks." Like, "Well, yeah, did you tell them you were working? Did you submit your pay stub?" "Well, yeah, sort of."

But for whatever reason, they've got the overpayment, whatever we can do to stop that, it will be huge because people will quit. They'll just walk in and quit that day because they can't do deal with it. That's been my experience.

Speaker: We have a comment from Amy right here.

Amy Wallish: Hi. I'm Amy Wallish from Full Circle Employment Solutions. And Patrice, we are part of the POC for BPQIs and also for wager reporting now as well. And I cannot thank you guys enough, the BPQI especially is super, super important. And being an EN in multiple states, you know, we try to make the connections with the local offices. Just one example, in Orlando right now, there's an issue apparently with pulling BPQIs, their system, something with – they have incorrect stuff. So we can get that through you guys instead, so it's really great.

And as long as I have the mic, can I make a couple of comments? Okay. As I was sitting here, I – first of all, thank you guys for your comments. The panelist is very appreciative. I want to reiterate just a couple of things. One of the questions – and I went through and looked at their questions through the registry too – was about how can we increase EN participation. And I'm not sure that's the right question to be asking. As an administrative employment network, as a partnership plus employment network, as a regular employment network, we do have rating. And I think looking at these admin employment networks is a great way to be looking at participation because I can tell you, we have ability one contractors under our EN model that worked with us. We support people through that. They get quite a bit of payments back through our participation, but they're not an EN, so they don't necessarily count. We have several other agencies throughout the different states that we work in as well that serve VR and we're a partnership plus EN in several states as well. And we – you know, we can grow – there are ways to grow without necessarily becoming an EN.

And then one other question – one other thought I wanted to mention is transition youth. So we also work under the PROMISE demonstration, which is for youth. They had to enroll when they were 14 to 16. But I would encourage Ticket to look at the younger people as well in some way. Yeah, and I think it was Cheryl – someone mentioned the Transition Youth. But it's a super, super important group of people to look at because really if you can get the education, the information to them and help promote that work at that younger age, they're more likely – and I know there's research out there – to be successful later on.

Speaker: Hi, Melanie, we have one more question in the room. We got it from IdeaScale. I'm going to address it.

Speaker: Good afternoon. So from IdeaScale, we received a question that asked whether or not there was a way that we could be more – that ENs and benefit counselors can be more in tune with what wages SSA has received for their beneficiaries so that they can be ahead of the overpayment situation. Someone talked a few times about the wage reporting proof of concept. As our current concept is throughout our field offices and payment centers, when we receive wages from the beneficiary or from their employer, we enter it into a system. However, it does – it goes from a Ticket program manager into one of SSA's internal systems. But the actual verified wages are not made available immediately. So we implemented the wage reporting proof of concept so that we could scan those wages and then send a notification to our field offices.

That's helps the employment network because they'll know exactly what SSA is receiving on behalf of that beneficiary. They can help them to track their trial work payment and see when they're going to continue to work their possible cessation month. And it allows the beneficiaries to report their wages and receive a receipt immediately. In our office, we have our Ticket program manager individuals entering the wages directly into a system that's going to be accessed by our field offices, but we've taken it a step further to make the actual wages available. So the field office and the payment center will then be able to make an adjudicated decision immediately upon receipt of our

notification that we've received wages from that beneficiary. So it cuts out a lot of the lag time and it eliminates duplicate work of having to request wages that were already received in some way from a beneficiary.

And I think that pretty much responds to their question. The Wage Reporting Proof of Concept is only open right now to about 28 employment networks, but as resources allow and if we can get some additional resources, we hope to expand that to all the employment networks so that we can ensure that timely adjudicated decisions are made to reduce or eliminate overpayments to the best of our ability.

Speaker: I just want to add that that's a much better explanation of the Wage Reporting Proof of Concept than the one I gave earlier. So I like to put that in the record.

Speaker: Before we take another question, Joe, did you want to respond to that?

Joseph Ashley: Yeah. I would say that the issue – I support what you're doing with the Wage Reporting Proof of Concept and I think that's an excellent strategy. The other piece I might suggest, if you really want to have an impact on this is take a look at the regulations and set it up so that if an individual is charged with an overpayment but they have proof that they have submitted their pay stubs to a social security office, it's forgiven. If you did that, it would up the priority of putting the data in. So I mean, I'm just thinking out loud here. But I think that would have more impact. It has to be more important. And I think the steps you're taking going to put it in that way and I support that wholeheartedly. But there are some regulation opportunities too.

Melanie Porter: Thank you, Joe. Operator, can we open the phone lines once again?

Operator: Yes, ma'am. And we'll go to our next phone question. Please go ahead.

Susan Webb: Hello. This is Susan Webb from Ability360 in Phoenix, Arizona. And I'm representing the Employment Network Advocacy Coalition. The 16 questions that were asked in this forum are the same questions that were in the advance notice of proposed rulemaking from 10th February of last year. Those of us who commented on those, including the Employment Network Advocacy Coalition, submitted some very comprehensive responses to those questions. And I'm curious, since it was so long ago and you're asking the same questions, are those comments still relevant that you're still considering those? Or should we consider resubmitting in some way? I guess it's a question for Rob.

Robert Pfaff: Yeah. Thank you, Susan. Those comments are still relevant. And the purpose of the forum today is to enhance those comments, add any additional comments, or other non-regulatory suggestions or enhancements to the Ticket to Work program. So I hope that answers your question.

Susan Webb: It does. Thanks, Rob.

Operator: And at this time, it looks like we have no further questions over the phone.

Melanie Porter: Okay. James or Renee, have you received any questions?

Speaker: We have one question over here.

Speaker: Hello. Thank you, everyone. So I heard from the panel a number of suggestions to kind of loosen kind of the payments around Phase 1 and kind of – and I see this kind of from the OMBI perspective, that would probably increase the payments from Phase 1. Is there a way that you feel that we could loosen those payments, but also increase accountability on the backend to ensure that there was more outcome payments, to say that people actually return to work completely? So if you – we loosen on the frontend, if we increased on one level, how can we make sure that on the

frontend or on the backend that we actually have more accountability from the employment network to actually continue following these folks, to ensure that they're in work? So I think there's a little give and take there.

Speaker: Can I paraphrase that as, would that give us more return on investment, where we need to do that?

Judy Sanderson: I – just off the top of my head, my first reaction is that if we are going for Phase-1 payments, then they are already employed and working at least the trial work level. I don't know – off the top of my head, I'm not sure what kind of ongoing proof that we can provide that will balance out any additional payments we might get at this point. I think I'd have to take it back to the NINA and we'll talk about it. But right now, other than the fact that they're already employed and we wouldn't be asking for those payments. We started the process and hopefully, they're going to continue.

Melanie Porter: All right. And being mindful of the time, we are going to – are there any other last questions in the room? We've taken that as a 'no.' I'd like to turn it over to Marianna LaCanfora who is our Acting Deputy Commissioner for Retirement and Disability Policy to provide our closing remarks.

Marianna LaCanfora: Good afternoon. Thank you very much for sitting through quite a long discussion, but really an engaging and beneficial one. I'm standing – we're about ten minutes over. I'm standing between you and your next engagement, so I'll take no more than 30 seconds to mention four very quick things:

- Number one, the IdealScale engagement remains open for another two weeks, through 25th April. And with respect to the question about what we're doing with the comments, I want to assure you that we're reading every single one in great detail, not only the ones that have already been submitted through the AMPRM but also the IdeaScale comment, taking into consideration this

discussion. And the reason we're continuing the discussion is to make sure everyone has had a chance to have input, because there are so many different perspectives. And we're very grateful for your input as we try to strengthen the program.

- Number two, you're also going to receive a survey about the forum itself. Please take a few minutes to fill that out. We want to keep the forum going and cover a variety of different subjects. Jim mentioned this is our sixth one. We have other ideas about program changes and improvements we'd like to make that we'd like to engage you on. So we need you to stick with us. And if there's ways we can improve the forum, we welcome your thoughts on that.
- Number three, I just want to thank a lot of special guests who took time out of their busy schedules to be here. You know, the RMB team, some of those folks are here. We have staff from Ways and Means, from Senate finance. There's a lot of Hill involvement and engagement and interest in supporting our beneficiaries' return to work goals and we're just very grateful for you all being here, in addition to our distinguished panelists who all presented great information to us.
- Last but not the least, the Office of Communications and the staff across my shop, in the policy shop, in SSA who all worked on this. There's quite a lot of effort that goes into making it happen and thanks to all of them.

And with that, that concludes our sixth National Disability forum. Have a wonderful day everyone.

Thank you.