# All EN Payments Call

 Transcript

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April 26, 2016

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Operator: Ladies and gentlemen, thank you for standing by. Welcome to the All EN Payments Call. During the presentation, all participants will be in a listen only mode. Afterwards we will conduct a question and answer session. At that time if you have a question, please press the star followed by the 1 on your telephone. If you need to reach an operator at any time please press star zero. As a reminder this conference is being recorded Tuesday, April 26, 2016. I would now like to turn the conference over to Shawn, please go ahead.

Shawn Walcott: Thank you, Stephanie. I am Shawn Walcott, EN Payments Manager and your host for the call today. Joining me in our McLean office is Debbra Tennessee, Ticket Operations Manager and on the line on behalf of the Social Security Administration I have Natalie Sendledorfer. Today we are going to discuss the SAM profile, learning opportunities, ticket portal tips and tricks and our question and answer forum. So let's get started.

 With our E-pay status. TPM is currently processing a new E-PAY file. The new E-PAY file contains a little over 14,000 SSNs as of Monday, April 25th. Our EN payment staff has processed 748 SSNs thus far. As a reminder, if you have evidence of earnings or approved earnings are available in our system, you may submit your ticket request through our ticket portal instead of waiting for e pay. An additional reminder, be sure your payment information is current. We reference is for confirmation of possible split payments. Verify your payment contact using the ticket portal by selecting new directory information about your EN or SVR from the main menu. To add or modify a payment contact, please send a request to EN service at SSA.gov and specify the name of the person and indicate the title you want them to have. All payment contacts must have completed suitability.

 As we proceed to the next slide, the system for award management, better known as SAM. SAM registrations must be renewed annually at [www.SAM.gov](http://www.SAM.gov). ENs must review their account information periodically and report any profile changes immediately. Social security and the U.S. Treasury cannot make payments to an EN if the SAM profile is not active or banking information current. To ensure your payments are sent to the correct account, notify SSA at en service at SSA.gov when changing your banking infomation.It is the EN’s responsibility to ensure that its SAM registration is current. Only ENs with active SAM registration are included in E-PAY. How can ENs assist beneficiaries in preventing overpayments? ENs can help beneficiaries by doing the following: encouraging beneficiaries to report their earnings in a timely manner, encouraging all beneficiaries that are self-employed to file their income taxes by April 15th and also familiarizing beneficiaries who are self-employed with pertinent tax forms. Encouraging beneficiaries to report their earnings directly to their claims representative and to request written documentation of their earnings as reported each month. Additionally, inform beneficiaries that they may contact the field office and voluntarily request suspension of benefits to avoid or reduce a possible overpayment. A voluntary request for suspension may be processed when the beneficiary commits the following: has completed the grace period after the trial work period, is not entitled to a trial work period, and is in the expedited reinstatement period. If the beneficiary thinks he or she should no longer get monthly benefits, he or she should always tell the field office. In addition, the beneficiary should hold the checks or deposit them in a separate bank account until it is clear whether or not benefits should have been suspended.

 Learning opportunities. The TPM and SSA wants you to thoroughly understand the new ticket portal and how to complete transactions in it. Your first training opportunity is the self-paced module that was created to offer a simulated experience of working within the ticket portal. This module allows you to go through the transactions as if you were really completing them. It is highly recommended that you work your way through the self-paced module as time allows to create a comfort level with performing transactions within the portal.

 Accessing the payment requests from the actions menu. You can access the payment request screen by selecting the actions menu from the list of beneficiaries currently assigned to your EN the more actions screen provides several options, including request a payment. Enter the payment month. The payment request screen will display. This screen is an input screen where the EN can request payment for a month based on the beneficiary selected from the beneficiaries currently assigned to on screen. If you have accessed this screen from the main menu, you will be prompted for the SSN again, only evidentiary payments are being accepted through the portal.

 Only one payment request can be submitted at a time because each payment request automatically creates a work case in SSA's system. If you submit multiple claim months for the same payment request by mistake, the additional months will be denied as a duplicate request. This chart provides guidance in how to select the appropriate claim month for phase 1 milestones. It is also included in the user guide. For example, if you are requesting a phase I milestone 2, then you would enter the third month or attainment month that qualifies you for payment.

 Select a payment type and add earnings. If phase 1 milestones are not available for the ticket you will not see the option to request a phase 1 milestone payment. Select the type of payment you are requesting and this click submit. Only phase ii milestones and outcome will display as choices.

 At this stage, the system is performing several checks and will provide an important information box with a message regarding what was found. The portal will perform a review to determine if there are sufficient earnings in SSA's records to pay this case. If there are sufficient earnings you do not need to provide evidence. In this example there are not enough earnings. Since the portal only accepts evidentiary payment requests, if there are not enough earnings in the SSA system is to pay the claim, you must submit evidence that the beneficiary is working at the level required for the payment type that you requested in the claim month you entered.

 If you do not have earnings evidence, select the close button to cancel the creation of a payment request. If you do have earnings evidence, select yes under add earnings.

 Enter earnings. Limit of 25 earnings per request. No need to enter earnings more than once. Must complete all fields marked with an asterisk. A ticket holder earnings box will display. You must complete all fields marked with an asterisk again.

 As we proceed to the next slide, review and verify earnings, when you click on the submit button you are automatically creating a case in SSA's system. A fax cover sheet is automatically general rated to associate your earnings evidence with the payment request you created in the ticket portal. If you have finished entering the earnings information, review your payment request to make sure it is complete and accurate. When you click on the submit button you are automatically creating a case in SSA's system. You cannot edit or delete a payment request once it has been submitted.

 You will notice there is a check box next to proof of earnings will be faxed in. This automatically generates a fax cover sheet that will associate your earnings evidence with the payment request you are creating in the portal.

 If you uncheck this box a cover sheet will not generate. You will need to generate an additional cover sheet to attach the earnings evidence to the work case you created. You also have the option to add a note by clicking yes. This is not viewable by the payment specialist that will process your request.

 Fax cover sheet. If you entered earnings on the previous page or manually checked the box to create a fax cover sheet, you will be taken to this page. Click download fax mail cover page to save a copy of the cover sheet. The cover sheet will generate your payment request has been created. Your payment request will now show up on the list of pending payments.

 There will complete the presentation portion of our call and with like to start our question and answer session. Debbra, do we have any questions presented in the chat room?

Debbra Tennessee: Yeah, a lot of questions in the chat room but I think I’ve been answering them as quickly as they are entered. (Inaudible) asks the question, how long will it take before payment is paid (inaudible) portal? Normally it can take 4 to 7 business days and I say that normally, but it can take a little bit longer. What we're seeing historically, however, is 4 to 7 business days.

Shawn Walcott: Thank you, Debbra.

Debbra Tennessee: We cannot hear Debbra talking. I will repeat my answer. It was a question Mary Lynn asked, how long will it take the ENs to see their payments paid or moneys posted in their accounts after they see the status allowed in the portal? It normally takes 4 to 7 business days. It can take longer but historically it has been 4 to 7 business days.

 Now, Elaine has the question can we use scanning email instead of faxing? If you're talking about faxing documentation or additional information into a payment request that you submitted through the portal, no. You should use that cover sheet that you printed when you originally entered your payment request through the portal. You could attach to that cover sheet anything that you want but you have to fax it back to the number that's listed.

 The reason for that is that cover sheet has a work case number. Once it's faxed back into SSA, that cover sheet and any information that's associated with that cover sheet will automatically associate to your work case and it makes it much easier and faster for us to work it.

 There's a question, if a fax cover sheet does not come up after entering the pay information is there any way to have the fax page I guess created? Whoever sent that question in, could you please send that in to our EN payments help desk if you have experienced that type of situation? Because you should be able to, once you have completed a payment request you should be able to fax that cover sheet. So there may be something else wrong there.

 I have a case -- this is from Robert. I have a case recently where I had 9 payments allowed and then reversed the next day. Any reason why this happened? Robert, again, this is a specific situation. You should send that in to the payment help desk and if you have work case numbers it will be helpful to submit those.

Shawn Walcott: Any additional questions, Debbra?

Debbra Tennessee: There's a question about TPRs. We don't have information on TPRs at this time but if you have a question send that up to our help desk and we will forward that to SSA. Okay, let's see. At one time we were receiving e pay payments quarterly but we have not received payments since December. Only thing I can tell you, Brian, based on the information we received, and we just received an updated quarterly file, we may find some payments you are eligible for this time around. If not and you believe you are due some payments, send them in by way of a payment request because, again, we process will create an e payment file based on records in the social security system.

 Someone else asked what was the help desk phone number and Janet cousins has provided the number, 866-949-3687. Thank you, Janet.

 Jennifer asked the question, if we call maximus to suspend a ticket, will the ticket holders still be protected from CDRs on a time frame that tickets are suspended? I don't think we suspend tickets. I think there's an inactive status. I have to confirm that, that there is an inactive status that we can place on a ticket and I’m not really sure about what happens with that. But, again, we can get the answer to that and get that answer for you, Jennifer.

 When is the quarterly file expected to be processed? It's not a quarterly file. I guess you mean the quarterly e pay file. If that's what you're referring to, when I say quarterly, I’m referring to the earnings file. That's when SSA tries to run an e pay file. They try run it in tandem with the quarterly earnings file that we receive so we will have the latest earnings information.

 We're processing that file right now. At the beginning of the presentation Shawn mentioned that we just got a file in. We have 14,000 SSNs so please be patient. We process these SSNs one at a time. I tried to put a little bit of this in the chat.

 When we have a claim on SSN we look of course to see what earnings have come in but we look back to see if any earnings have been posted for prior period, we see what has been paid, what has not been paid. So we work these claims almost as if it's a brand new claim coming in the door and even though there may be new earnings coming in, we look for old earnings as well.

 Anybody else with questions?

Shawn Walcott: Okay, at this time I'd like to open up our phone lines for our question and answer forum. Stephanie, please advise our audience our lines are open for any payment-related topics they would like to discuss.

Operator: Ladies and gentlemen if you would like to ask a question, please press star followed by the number 1 on your telephone key pad. One moment please for your first question and we have a question from Steve Gurkey.

Steve Gurkey: Hi, this is Steve Gurkey with key services in Colorado. When I have someone that's self-employed and they are do ago quarterly statement, I have heard conflicting information about whether they are supposed to send it in or not or whether I can send it in for them or not.

Debbra Tennessee: Let me tell you about SEI we don't have what we call certification payment requests anymore and what you are talking about is a certification payment request where ENs send in a payment request and attached to it is an SEI form where the beneficiary can fill out gross earnings, expenses and net.

 This is information that has not been reported to the IRS, Social Security doesn't have those earnings, and we don't know what taxes have been paid so we do not use that information. One other piece of information that Shawn mentioned at the very beginning was for self-employment income beneficiaries to file their taxes as soon as possible because that information goes to the IRS and we know what the net income is and what taxes the beneficiary was liable for. So that's considered evidentiary earnings or evidentiary -- it's evidentiary once we have the earnings posted to SSA's data base.

 If you have a payment request or a beneficiary who is self-employed more than likely for current claims you would not, we would not pay you because we would not have any earnings information in SSA's data base for those earnings.

 At this point I do believe that we do have, we start receiving some SEI earnings, posted earnings, in SSA's data base so we are paid for SEI cases now.

 You can also try if you are not sure whether or not the earnings are in SSA's data base, you can submit your payment request through the portal. At the point where you list the claim month you may get a message that earnings are already proven. In you get that message, even if you don't have any evidence of earnings, if the earnings are already proven that case can go through, you don't have to worry about submitting any evidence because it's already in SSA's data base, we will accept that claim and work it based on the earnings already in the SSA data base. At that point we will look at the payment status of the beneficiary to see what type of payment you might be eligible for, we will assess the claim from the very beginning.

Steve Gurkey: So it's not necessary for either myself or the beneficiary to send those statements in any more, they just need to do their taxes?

Debbra Tennessee: Exactly. Say, for instance, there's a beneficiary you've been working with for 2014 and they have earnings you could send that request in even if you don't have any evidence at all. By now we should have 2014 earnings posted. So more than likely if your beneficiary has submitted their, you know, their tax returns for 2014, the earnings are posted in SSA's data base.

Steve Gurkey: Then what's the procedure in terms of, I have an individual who has not been reporting his self-employment income. It's been two years.

Debbra Tennessee: I guess IRS will catch up with them eventually.

Steve Gurkey: Yeah.

Debbra Tennessee: You know, this is what this program is all about is, you know, getting beneficiaries back to work and based on their earnings, you know, we pay ENs when beneficiaries reach certain milestones but we have to have some evidence of their earnings.

So as much as possible, you know, they could even go into a field office I believe there are some SEI beneficiaries who report their earnings to field offices.

Steve Gurkey: Well, for what it's -- doing what he's supposed to do.

Debbra Tennessee: Because see on a quarterly earnings report is only based on what employers report. If you are self-employed that information doesn't come to us. We get our earnings information a number of different ways but if earnings are not reported we don't get it at all.

Steve Gurkey: Thank you.

Operator: Our next question comes from the line of Lisa Politiano.

Lisa: Hi, this is Lisa Politiano, career source in northeast Florida I have a question about the work incentive planning and protocol. I know it's being worked on and do you have any updates for us? I will tell you my difficulty. I am no longer for a while now able to refer one of my customers to my local WIPA office to meet with a community work incentive coordinator.

Shawn Walcott: Local instructions are customers need to call the ticket to work help line. When the ticket to work customer calls the help line because they are connected with us, you know, we'd like them to do that before their ticket is assigned so we've met with them and provided some services even before the ticket is assigned. The information they get when they call the ticket to work help line is information about all other ENs and can they, you know, get a list of all the ENs, which is fine. Most of them have already done that. That's how they found us. And the Ticket to Work help line representative will not give them a referral to the WIPA office unless they are working or work is imminent or if they are in active job search.

Debbra Tennessee: Let me give you someone to send your inquiry to. It's actually the manager of our beneficiary help line where those beneficiaries are sending those inquiries. Send your question directly to, and I’m going to give you this name, Laurie Armstrong at maximus dot com. And Laurie should be able to answer that for you. Because the beneficiary help lines that have been trained on what the referrals and I cannot answer your question at this point but Laurie can look into that and answer it for you.

Lisa: I appreciate that. And I realize this is called a payments call so I kind of threw that one in there.

Social Security: Yeah, yeah, we try to -- we have someone you can contact on this.

Lisa: Right. And we do want beneficiaries to know how earnings will impact their benefits. It's such an important part of the program. So I will contact Laurie and I appreciate that.

Operator: Next question comes from the line of john stint.

John Stint: Okay, how you doing? I was just wondering since the e pay system has been implemented now would that system prevent overpayments, will there be any overpayments anymore?

Debbra Tennessee: It's always a possibility of overpayments because again let me tell you about this process. We should have, less but it is a manual adjudication process. There are a number of controls in place, we have what's called an end line review to reduce the number of overpayments.

 So the answer to that question is, yes, there will be overpayments but it should be less.

John Stint: Uh-huh. So this is not a closed case situation where we don't have to be concerned about overpayments anymore.

Debbra Tennessee: I think there should always be a concern there, but if you kind of know your beneficiaries that you are dealing with, you know they are working or if you know they are not working, we have had ENs who have sent us money back who have said I know for a fact this person isn't working. I have had ENs who have said I’m not doing anything for them. That's very, very rare and far between, but sometimes the EN has to give us information. I don't know of a situation where we would have paid an EN where the beneficiary was not working under today's e pay rules. It may have been under one of our older e pay processes when we were looking at consistent earnings, but there is still the possibility of an overpayment.

John Stint: Okay, great, thank you.

Operator: As a reminder, if you would like to register a question press star then the number 1 on your telephone key pad. Our next question is from Erin.

Erin: Hi, this is Erin from reability in Portland, Oregon. I have two questions, the first I think was already answered but I want to make sure because I heard something about 2014 tax earnings. I just wanted to make sure the most current quarterly earnings file is capturing the 2015 tax returns because I have a couple clients that really haven't been reporting their income like they should so I was just wondering if your most current quarterly earnings file is going to capture last year's tax income.

Debbra Tennessee: I know SSA is on the phone, but I can tell you if somebody from SSA could tell us what's the latest quarter that we've received, oxi earnings, I think it was the last quarter of 2015 but I’m not sure because this is just April, four months into the year and I’ve heard we could be 6 months behind getting those earnings.

Natalie Sendledorfer: This is Natalie at SSA, I believe we're working now on the fourth quarter.

Debbra Tennessee: In response to your question, if a self-employed beneficiary has filed their taxes in January we should have those earnings posted to -- we should have those earnings posted to SSA but right now I mean we are up to April 15th, 18th, I forgot what it was this year, you wouldn't have that information this soon. We might have it in another couple months. But we at least have a full calendar year of earnings through the quarterly earning process posted to SSA records.

Erin: Okay, great. And my second question is a little bit different. I got a call from someone interested in the ticket to work program who said he was actually getting, like, a percentage from his current EN it sounded like a kickback to me. To me I thought that was illegal, but is it permitted to give, like, monthly stipends to ticket to work clients?

Debbra Tennessee: It's not a stipend. There are different types of business models with ENs. We have traditional ENs and those ENs where the beneficiary goes to work, the EN provides different services and support and the beneficiary goes back to work and once the beneficiary has achieved a certain level of earnings, the EN receives maybe, you know, Phase 1 milestones, phase ii milestones, or outcome payments depending on the payment status and dependent on the earnings level.

 We have different models, we have employer ENs and we have something called consumer directed service ENs. These ENs provide a service, and it's legal, by the way, beneficiaries go to work and the support that is actually provided are in things like transportation -- it's a number of items that the EN can reimburse the beneficiary expenses for. So that's what it sounds like.

Erin: That's good to know because I was pretty surprised when I heard it. They were currently assigned to an EN, wanted to come to someone else but then they said, well, I’m getting payments, how much are you going to pay, basically.

Debbra Tennessee: Yeah, that's under a specific business model.

Erin: That's good to know, thank you.

Operator: There are no further questions.

Shawn Walcott: Do we have any other questions in the chat room?

Debbra Tennessee: Yeah, I have two that I want to address. One is from Teresa. Her question is I have a beneficiary that is a 1099 but she has assigned document from her employer bimonthly showing her wages. How do I submit? A 1099, that's a contractor, withholdings are not made so we treat that as self-employed. So it would be the same way we would treat any other self-employment claim. You could submit the claim through the portal if the earnings are posted to social security's system and it meets the criteria for that payment we will pay. If not, you will have to wait till that beneficiary files taxes.

 (inaudible) asked the question can you clarify working in the fourth quarter of 2015? Does that mean earnings as of 12-13-15 or earlier? It means the fourth quarter of 2015 covers October through December 31st, 2015. So when I say that we have in the fourth quarter of 2015, that quarter is October through the end of December. We have already had prior quarters for 2015 and so what I’m saying to you, now we have a full year of earnings for all of 2015. The latest earnings that we have cover October through December. Okay?

Shawn Walcott: Okay, so no more questions?

Operator: We do have a question from Janet.

Janet: I was just wondering if there is a possibility of doing a combination of traditional and consumer directed services.

Debbra Tennessee: Okay, let me -- Janet, what state are you in?

Janet: Oregon.

Debbra Tennessee: Do you know who your ENSB analyst or specialist is that works at social security?

Janet: No.

Debbra Tennessee: Okay, what I’ll do is I’ll send your inquiry to social security. Every EN has a representative from the EN Services Branch of the Social Security that you can call with any questions about the Ticket program and this group also works on contracts. So I’ll send the inquiry up to whoever -- you said Oregon?

Janet: Uh-huh.

Debbra Tennessee: Okay, I’ll send this inquiry up to find out who has Oregon and send the inquiry up to that person to get back to you.

Janet: Okay, thanks. Can I ask you one more question? I guess I always assumed if somebody went all the way through the program, all the payments, all the phase ii payments, even if some of them came in a receipt tremendous check, outcome payment, this had somebody who terminated prior to getting all those payments. She terminated because she was working and her extended period of eligibility was over and I mean she was doing good. But I felt like I missed a few payments at the end there. Is that typical? I guess I just can't get my head how around that happened.

Debbra Tennessee: I don't see that many situations where there's a termination of the beneficiary. If you look in the regs, I believe it's only in the regs. You can get paid as long as the beneficiary is eligible for the ticket program. Is this a medical CDR, they are no longer disabled is one reason. If they reach a certain age they are no longer disabled, they are in the age door, old age survivor's insurance trust fund. There are a number of reasons, 3 main reasons, I believe, but I’ve never seen a situation or if I have it may have been one or two situations where it was a medical CDR so the beneficiary was no longer eligible for ticket to work.

 The other situations I’ve seen where that particular ticket did not go to the full payment is if the beneficiary had a new date of disability onset. They may have applied for an expedited reinstatement claim and it was approve and if it was, if that situation happens, then the old ticket is no longer valid, it should be terminated, a new ticket should be created, a new IWP should be signed with the beneficiary, the beneficiary can go to a different EN because it's a new ticket, it has a new value.

 So those are the situations I know where, you know, you may not get the full amount.

Janet: Go back through 3xr, I’m still trying to get why she terminated from the local office.

Debbra Tennessee: I’ve seen some other things too because, you know, you have title 16 title to SSI, SSDI recently I’ve seen a situation where it was an SSI beneficiary went into a non-pay status because they requested to voluntarily to be terminated from the program.

 Now, this is something, if that beneficiary had had high level earnings where outcome payments could be paid, it all depends on the reasons for their request to terminate from the program. If it was a situation due to their work or earnings they were making enough money and they just did not want to be bothered with, you know, the program any more, they felt that they were self-sufficient, we still can pay you outcomes on those. So it all depends on the reason and the program. The rules for SSI and SSDI can be different.

Janet: So I’m best off either getting the information why she terminated first.

Debbra Tennessee: I’m sorry, what did you say?

Janet: I should find out why she terminated first.

Debbra Tennessee: Yeah, maybe it was a mistake. You can check into that. Sometimes a record is terminated and should be terminated again for SSI but the ticket is incorrectly terminated. So you may just want to check into that.

Janet: Okay, thanks.

Operator: as a reminder if you would like to ask a question, please press star followed by the number 1. Our next question comes from Tina.

Tina: I was just calling, I wanted to ask about the terminations that she was just talking about. Okay, one thing that I have seen and we haven't got payments because of terminations, is because the local office doesn't have contact information on them. So we've been denied payment even though we've had earnings because the local office for some reason can't get in touch with the client.

Debbra Tennessee: Okay, that's a valid reason for not paying. We don't call it terminate, we might say suspended because for all we know that beneficiary is deceased.

Tina: Right, but in the past we've had the earnings and we've been denied payment and maybe their address isn't on are earnings that we have.

Debbra Tennessee: We make payments to you, there are certain rules we have to follow. Basic payment status that we follow is the beneficiary is in a current pay status, we pay you milestones, phase 1, possibly phase ii, based on the earnings. Or the beneficiary is in a nonpay or suspense due to work or earnings. Those are the only two reasons for suspense and non-pay. If there is a reason for nonpay or suspense other than those more than likely based on the rules we do not pay you.

Tina: Right, it was the reason for denial was, you know, suspense due to other than earnings. But it was simply they didn't have the guy's updated information.

Debbra Tennessee: Well, get in contact with that beneficiary, please, ask them to go to social security to update their mailing or their address information.

Tina: Tight. But it just seems, you know, because we've got the earnings to prove it, they are not due the social security benefit, they are probably getting direct deposit and we're being denied because the person doesn't tell social security they moved.

Debbra Tennessee: You know, that pretty much, as far as I remember, I used to work at social security at one time. Even program benefit payments were suspended at some point and I understand what you're saying. You know they are not deceased because they are still working and you see the pay stubs or whatever. But that's even a rule not only for ticket payments but for program payments. If the address is not updated and SSA knows that, they will put a code there to suspend any type of payment.

Tina: But now once they do, if they ever do get the updated information, will they go back and pay those months?

Debbra Tennessee: Yes. This is what happens with e pay, by the way. E pay is good. Again when I mention how we process a claim, we not only look at the current earnings or the current pay status, whenever we look at each SSN on our file, we do a full review of that SSN we go back. There have been some beneficiaries that have been in current pay sometimes for a couple years with high earnings and SSA may retroactively place that beneficiary into suspense due to work or earnings. We have gone back and paid 24 months, 36 months.

Tina: No, I’ve seen that. I actually with ours what I don't think a lot of people realize is they are waiting around for e pay but you don't have to.

Debbra Tennessee: You don't have to and that's why we mention that you can continue to submit your payment requests and especially -- I mention SEI because a lot of times SEI ends with SEI clients, they don't have evidence, it was just that form we had to use at one time where the beneficiary could submit their gross and net earnings. But, you know, if you believe they are working, if they have said even to you I’ve already been paid for a lot of our clients up through December because the information's there, you just haven't processed the file yet. So I’m pretty much caught up, up until at least December for the ones I don't have earnings for. The information is there and you don't have to wait for the e file if you go in and start the payment request, as long as there's established earnings you process it and I’ve gotten, I’m pretty current.

Tina: Okay. And other ENs, that's why we wait for that updated quarterly file to work an e pay file, we get more bang for the buck.

Debbra Tennessee: Right, it doesn't sound like from some of the questions so. ENs don't realize you don't have to wait for the e pay to come out. So that was just something to get out there, that you can go and if you know, check and see if there's established earnings. You don't have to wait for the e pay to come out.

Tina: But, yeah, that was just another termination reason that I’ve seen in the past and that I just didn't understand why if it was just because of contact information when we had established earnings, we had the earnings in hand, we just didn't have the current address. Because the guy won't give it to us. I don't know if he's paranoid or -- he won't give it to us. That's it, thank you.

Operator: Our next question comes from Donna Connelly.

Donna Connelly: Hi, this is Donna Connelly, goodwill original county, California. I just had a general question. Shawn mentioned earlier the learning opportunity through the self-paced module for the ticket portal. Is that accessed through the actual ticket portal or is that outside the ticket portal? I’m fairly new to the program and was hoping to get some, you know, some type of tutorials, a good look at the Ticket Portal while I’m going through the suitability process. Can I access this without actually being in the Ticket Portal?

Debbra Tennessee: We have someone from our training department here who can answer that question for you.

Alexa Valencia: To access the Ticket Portal or any module, that's actually on the secure site. We have a separate site on our public web site that's specific to ticket portal web sites so you need ticket portal access. If you are unsure of those steps you can either contact whoever your EN consultant is here at TPM or your ENSB representative.

Donna Connelly: I do have the SSA account with the extra security set-up. We're pretty much just waiting for the final clearance. We understood there was some training and some things we should be doing while we are waiting.

Alexa Valencia: Yeah, apparently on the public site of your ticket to work dot com there is minimal resources about the ticket portal. However, to view the actual screens that you will view within the ticket portal, how to process payments and all of that information, you won't have access to that information until you pass the requirements necessary.

Donna Connelly: Understood. Okay, thank you so much.

Operator: Our next question comes from Gloria Hopkins.

Gloria Hopkins: Hi yes, thank you. I have maybe two questions. The first question is I recently submitted a request for payment for a beneficiary and they had established earnings in the portal. And I got denied, I think it was a number maybe 21, I’m not for sure, but they were saying they were waiting on documentation such as the EN service certificate. However, this is a beneficiary from, like, 2009 or 10 and we didn't fill that document out at that time.

Debbra Tennessee: Are you saying the request was for EN’s supplemental earnings?

Gloria Hopkins: No, not supplemental earnings. I think they were request asking me for, like, certificate of services.

Debbra Tennessee: That is an optional process. If you did get something about requesting that, I need you to send your request into our EN payments help desk to check that. I’m not sure, maybe the wrong denial reason was sent to you but that process for EN certification services is obsolete. So I’m not sure why you got that denial reason.

Gloria Hopkins: So you want me to send the actual request where?

Debbra Tennessee: You can send inquiry into our EN payments help desk.

Gloria Hopkins: Okay. Help desk.

Debbra Tennessee: if you still have any of those work case numbers --.

Gloria Hopkins: Yeah, I still have the work case numbers because --.

Debbra Tennessee: Okay, put that in your email, your request. Due to PII you shouldn't put the name, but if you list the work cases that were denied and the reason was the request for EN cost or certification of services, send that request up so that the provider support manager or one of the staff can take a look at that and investigate.

Gloria Hopkins: Okay, great. My next question, what happened, I went to put in, in the portal a request for payment for one of the beneficiaries and he was no longer in my portal. I’m, like, I didn't understand what happened to that person. So what I did, I even put his social security number in there and it came back, the ticket is unassignable and has been terminated. So he actually called me the same day, he said what's going on because social security called me in and they're going to take me off social security because they said I’m able to work. Now is that a case where the case is just closed and I just on my end just close the file?

Debbra Tennessee: Sounds like to me -- again, not knowing everything I really can't give you a good answer. But what it sounds like, it sounded like it was a medical CDR but if they had a ticket assigned they should have been excluded from that. So I don't know. Again, you would have to send that specifically as an inquiry into our payments help desk so we can research that particular item.

Gloria Hopkins: Oh, okay. Thank you so very much for your help.

Shawn Walcott: Stephanie, I was just asking if we had any additional questions.

Operator: We do have a question from William.

William: Hello. My name is Bill Temple, I’m calling from Staten Island, New York, and I’m calling about the policy relative to the resources that a person can be disclaimed from their waiver can be issued and if a person has been for instance hypothetically we have seen a couple instances where a person is starting to work and make ago very significant salary and as a result of it they started to put some money in the bank and shortly thereafter they were told that they had exceeded the amount, I think it's $2,000 and that these resources could preclude them from receiving any further help from social security as well as the EN of course does not receive any further remuneration for their efforts on their behalf. And I’m wondering if that policy is being read properly because it seems to be in contradiction to the (inaudible) you -- 9 months you can earn as much as you can, rebudgeting happens after 9 months if I understand properly.

Debbra Tennessee: It sounds like you are talking about a SSI recipient and there are rules about SSI again, there are two different programs. SSI is a needs-based program and it's based, eligibility for the program is based on resources.

 So, you know, for title ii you could be SSDI, have money in the bank and it might not be an issue but for SSI it is an issue. Before the federal government makes these payments they are looking at all your resources so that situation sounds like it could happen. And if it did happen again it sounds like it was an SSI recipient, so that beneficiary -- and, you know, I don't know right now whether you have someone in your, I guess it was c wick or someone, who would it be in the social security office who could educate the en's on the rules for the different programs? Because it sounds to me like this is an SSI case.

>> Stephanie, let me interrupt for a second. It would seem to me as though, if we have an SSI applicant that it seems to be suggesting that we, contrary to what we normally would suggest if they start making a decent salary, that they put aside a little bit for a rainy day and that rainy day may come around more quickly because of exceeding that $2,000. Should we suggest they tuck away the amount of money in a mattress so they are not being disclaimed, in other words, it becomes a disincentive, I would think.

>> I think that beneficiary -- I can't give you the rules on that because I’m not knowledgeable about what an beneficiary under SSI can earn and what other resources they may have. It could be other things other than cash that may affect their benefits. And if you don't know what the rules are that beneficiary should maybe check our beneficiary hotline, call that, maybe what wipa referral to educate them on the rules for SSI as far as what you can have and under what situations your benefits would stop and what resources you are able to have.

I think there's a certain dollar amount but I’m not sure what it is and I don't want to give you wrong information. But there are limits.

William: I can understand one of the things if they would hit the lottery or be named as an heir in a settlement of an estate that there's certainly go diding -- going to be a review of their assets. But by the same token I would think if it's money from the job we placed them in, that we put some effort into placing them, we should not be held to task as well or punished by virtue of the fact that our remuneration discontinued, is discontinued at that point. All right, I guess I have to call the help desk.

Debbra Tennessee: I think in this situation it would be the beneficiary help line.

William: Very good. Thank you.

Operator: We have a follow-up question from Lisa.

Lisa: Hey there again, thank you very much. I just wanted to clarify. So if a ticket to work participant with my EN receives services, goes to work and then becomes homeless where they don't have an address or we've also had that where they don't, where a person may not want to tell me their address, that the payments stop to the EN because the local SSA office does not have a current and correct address for the beneficiary?

Debbra Tennessee: I’m saying social security may place that beneficiary into a status if they don't have an updated address for the beneficiary. I know that there are homeless recipients and some use local field offices for addresses. I just know that this is just a rule or policy with social security, that the beneficiaries that social security serve, they must have a way to get in touch with them. It may not be a matter of mailing them a check because a lot is direct deposit but there's other information that social security needs to have contact with the beneficiary and again we have a number of situations -- this is program information that I’m talking about now -- there are a lot of payments that go out to deceased beneficiaries every year, every month. The only way social security knows someone has died is for someone to tell them. Another way used to be for returned checks from the post office because it would be marked on the envelope. But today since most of the payments are direct deposit there is very few methods or resources for social security to get that information for. But social security needs to have a current address for all beneficiaries.

Lisa: Okay, so that's something we would add to our information to program participants is not only report your wages every month but make sure, make sure, make sure that the SSA local office has your current address.

Debbra Tennessee: Yes.

Lisa: Otherwise you may lose program protection.

Debbra Tennessee: Yeah, and they can call the 800 number just to report a change of address. They don't even have to visit the social security office for that.

Lisa: Okay, thank you.

Operator: There are no further questions.

Shawn Walcott: Okay, as a reminder, the TPM provides an opportunity to all ENs to discuss payment related topics on the last Tuesday of each month during the all EN payments call at 3:00 pm eastern standard time. A full transcript and audio for the all EN payments call are all available on the ticket to work web site under the events and archives section. We encourage our EN community to take part in all the call sessions.

 The next all EN payments call is scheduled for Tuesday, may 24th, at 3:00 pm eastern standard time. This will conclude our presentation for today. Thank you all for listening. Your attention and participation during the call, please have a great evening and we look forward to our next presentation on May 24th.

Operator: Ladies and gentlemen, that does conclude the call for today. We thank you for your participation and ask that you please disconnect your line.

[CALL ENDED]