

TICKET *to* **Work** | **EN Essentials**

**Thank you for joining today's
EN Essentials Session.**

We'll begin at 1:00 p.m. ET.

**You will not hear audio or see captions
until we begin.**



TICKET | **EN**Essentials
to Work

Employment Network Payments Refresher

February 14, 2024



Agenda



Logistics and Introductions



Payments Terminology Review



Resources for Getting Started



Managing Payments



Questions and Answers

Logistics

- TPM is recording and capturing the transcript from today's meeting and will make it available on the Your Ticket to Work website at [EN Essentials Learning Events - yourtickettowork.ssa.gov](https://yourtickettowork.ssa.gov/EN-Essentials-Learning-Events).
- Per the Ticket Program Agreement (Part III, Section 11 subsection I), EN staff are not permitted to record this meeting nor capture the transcript.
- Please feel free to ask a question in the [MS Teams chat section](#).
- You may send additional questions or comments to: ENOperations@yourtickettowork.ssa.gov
- Closed Captioning is available for participants who join using the MS Teams Application or by using the closed captions link provided in the GovDelivery email announcement for today's call.
 - To turn on Closed Captions in MS Teams, go to the three ellipses at the top of the MS Teams window; click on "More"; scroll down the list to "Language and Speech" then click on "Turn on live captions."
 - When using the link option, paste the link in the browser and it will open a separate window to view closed captions.

Introductions

Moderator:**Derek Shields**

*Senior EN Development and Training Manager
Ticket to Work Program Manager*

Presenter:**Nicole Black**

*Payments Manager
Ticket to Work Program Manager*



Payments Terminology Review

Terminology Refresher

Question 1

*What do the acronyms
TWL and **SGA** mean?*



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Level of Earnings

- **Trial Work Level (TWL)**
 - Trial work allows Ticketholders to test their ability to work.
 - 2024 TWL – \$1,110 / month
 - Used for Phase 1 Milestone payments under the Milestone-Outcome system
- **Substantial Gainful Activity (SGA)**
 - 2024 SGA rates:
 - Blind – \$2,590 / month
 - Non-blind – \$1,550 / month
 - Used for Phase 2 Milestones and Outcomes
 - Typically, TWL and SGA rates increase each year based on the national average wage index.

Terminology Refresher

Question 2

*What are the **two** types of payment methods for ENs?*



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EN Payment Systems – Part 1

ENs must choose between two payment methods to receive payments.

Option 1: Milestone-Outcome Payment Method

- ENs can receive payment while the Ticketholder is still receiving a Federal cash benefit
 - Phase 1 – Earnings at **TWL** or above
 - 4 Milestones
 - Phase 2 – Earnings at **SGA** level
 - SSDI (Title II) – 11 Milestone payments
 - SSI (Title XVI) – 18 Milestone payments
 - Outcome – Earnings at SGA level after suspense of benefits due to work and earnings
 - SSDI: 36 payments
 - SSI: 60 payments

EN Payment Systems – Part 2

Option 2: Outcome Payment Method

- ENs receive payment when the Ticketholder is no longer receiving a Federal benefit.
 - Earnings at SGA level only after Ticketholder is in suspense of benefits due to work or earnings
 - SSDI: 36 payments
 - SSI: 60 payments

Terminology Refresher

Question 3

*What is the difference between **claim** month and **attainment** month?*



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Claim Month vs. Attainment Month

- **Claim Month**
 - The month a Ticketholder's work or earnings are used to satisfy the conditions of a payment request.

- **Attainment Month**
 - The month in which a Ticketholder attains the earnings necessary to meet a Phase 1 milestone requirement.

Example 1: Claim Month & Attainment Month

- To submit for a Phase 1, Milestone 2 payment, a Ticketholder must make at or above TWL earnings 3 months within a 6-month period.
 - If a Ticketholder achieves TWL earnings in January, February and June, those are the **claim months**.
 - June is the **attainment month** when the Ticketholder achieved the milestone.

- Submit the payment request for **June**, the attainment month.

January	February	March	April	May	June
Claim Month	Claim Month				Claim Month & Attainment Month

Example 2: Claim Month & Attainment Month

- To submit for a Phase 1 Milestone 1 (P1M1) payment, a Ticketholder must earn at or above TWL for 1 month after Ticket assignment.
 - The **claim month** and **attainment month** is January.
- You can use claim months from one Phase 1 Milestone to satisfy the conditions of other Phase 1 Milestones. In this case, January was a claim month for both P1M1 and P1M2.

	January	February	March	April
Phase 1 Milestone 2	Claim Month	Claim Month		Claim Month & Attainment Month
Phase 1 Milestone 1	Claim Month & Attainment Month			

Applying Terminology (1 of 3)

In September 2022, Ticketholder Joe was assigned to your EN. Joe had been out of work due to his disability for over 2 years. Joe obtained a job working at a bakery and earned \$2,200 in January of 2023. In February and March, Joe was unable to work due to his disability, but worked again in April and May at the same pay rate as January.

- Are you eligible for a P1M1 payment?
 - If so, what is the claim month for P1M1?
- Are you eligible for a P1M2 payment?
 - If so, what are the claim and attainment months?



Applying Terminology (2 of 3)

- Can you submit for a P1M1 payment?
 - **Yes**
 - Joe has earned over the minimum TWL earnings required for a P1M1 payment and is still receiving Social Security disability benefits (current pay status).
- If so, what is the claim month for P1M1?
 - **January**
 - This is based on the rule that P1M1 payments are for 1 month of earnings after Ticket assignment.

Applying Terminology (3 of 3)

- Can you submit for a P1M2 payment?
 - **Yes**
 - Joe has earned over the minimum TWL earnings for 3 months out of 6.
- If so, what are the claim and attainment months?
 - ***January, April and May are the claim months.***
 - ***May is the attainment month.***



Resources for Getting Started

EN Payments Resources

These resources will help you get started:

1

EN Payments Checklist

2

Payments at a Glance

3

18-Month Lookback Tool

4

Proof of Relationship (PoR) Form

Resource: EN Payments Checklist

- This document reviews key exclusions and requirements for each payment type as well as many common payments issues.
- Locate the EN Payments Checklist:
 - www.yourtickettowork.ssa.gov
 - Resources > Resource Documents > Payment Resources

EN Payments Checklist				
Phase 1 Milestone 1	Phase 1 Milestone 2	Phase 1 Milestone 3	Phase 1 Milestone 4	Phase 2 Milestones
Current pay status without entering the Outcome period	Current pay status without entering the Outcome period	Current pay status without entering the Outcome period	Current pay status without entering the Outcome period	Current pay status without entering the Outcome period
The first month after the Ticket assignment month or any other month thereafter	3 months within a 6-month period	6 months within a 12-month period	9 months within an 18-month period	Any month after all available Phase 1 Milestones have been processed through to completion (<i>paid or denied</i>)
At or above TWL	3 months must have gross earnings at or above TWL	6 months must have gross earnings at or above TWL	9 months must have gross earnings at or above TWL	Each month must have gross earnings at or above SGA/Blind SGA
If the month prior to the Ticket assignment month has earnings at or above TWL, Phase 1 Milestone 1 cannot be paid.	If there are 3 months with earnings at or above TWL within 6 months prior to the Ticket assignment month, Phase 1 Milestone 2 cannot be paid.	If there are 6 months with earnings at or above TWL within 12 months prior to the Ticket assignment month, Phase 1 Milestone 3 cannot be paid.	If there are 9 months with earnings at or above TWL within 18 months prior to the Ticket assignment month, Phase 1 Milestone 4 cannot be paid.	
Proof of Relationship Required	Proof of Relationship Required	Proof of Relationship Required		

Website: www.yourtickettowork.ssa.gov | Email: ENPaymentshelpdesk@yourtickettowork.ssa.gov | Call: 1.866.949.3687 (toll-free)

Resource: Payments at a Glance

- This document is updated annually and shows payment rates for Outcome and Milestone-Outcome payment systems.
- Locate the Payments at a Glance:
 - www.yourtickettowork.ssa.gov
 - Resources > Resource Documents > Payment Resources

2024 Payments at a Glance

OUTCOME PAYMENT METHOD

Payment Type	Beneficiary Earnings Required After Ticket Assignment	SSI Ticketholder (Title XVI)	SSDI Ticketholder (Title II)
Outcome	Earnings sufficient for "zero" cash benefits status	Up to 60 Payments of \$560/Month	Up to 36 payments of \$998/Month
Total of Outcome Payments Available		\$33,600	\$35,928

MILESTONE OUTCOME PAYMENT METHOD

Payment Type	Beneficiary Earnings	SSI Payment Amount (Title XVI)	SSDI Payment Amount (Title II)
Phase 1 Milestones**			
Milestone 1	\$1,110/mo. x 1 mo.	\$1,788	\$1,788
Milestone 2	\$1,110/mo. x 3 mos. w/in 6 mos.	\$1,788	\$1,788
Milestone 3	\$1,110/mo. x 6 mos. w/in 12 mos.	\$1,788	\$1,788
Milestone 4	\$1,110/mo. x 9 mos. w/in 18 mos.	\$1,788	\$1,788
Total Potential Phase 1 Milestones		\$7,152	\$7,152
Phase 2 Milestones	Gross Earnings > SGA (\$1,550/\$2,590)***	\$300/mo. for up to 18 mos. = \$5,400	\$536/mo. for up to 11 mos. = \$5,896
Total Potential Phase 1+2 Milestones		\$12,552	\$13,048
Outcome	Earnings > SGA (\$1,550/\$2,590)*** And federal cash benefit = \$0	\$300/mo. for up to 60 mos. = \$18,000	\$536/mo. for up to 36 mos. = \$19,296
Total Potential Milestone and Outcome Payments		\$30,552	\$32,344

*The payment rate in effect at the time the Milestone or Outcome is attained is the rate that will be paid for that particular month, regardless of when the payment request is submitted.

** Please contact the Payments Help Desk (at ENPaymentsHelpdesk@yourtickettowork.ssa.gov) for explanations to exceptions.

*** The 2024 monthly SGA amounts are \$1,550 for non-blind and \$2,590 for blind individuals.

Website: www.yourtickettowork.ssa.gov | ENOperations@yourtickettowork.ssa.gov | Call: 1.866.949.3687 (toll free)

Resource: 18-Month Lookback Tool

- Excel tool that determines eligibility for Phase 1 Milestones (Milestone-Outcome system) based on prior earnings.
- Locate the 18-Month Lookback Tool:
 - Go to www.yourtickettowork.ssa.gov
 - Resources > Resource Documents > Tools for Success

EN Name: _____ Beneficiary's Name: _____ 18-Month Look Back Tool
 PID: _____ SSN: _____

MILESTONE 4													Enter Ticket Assignment Date in Red Box Below MM/YYYY	Enter Date of Disability Onset in Red Box Below MM/YYYY	Enter Most Recent Date of Successful VR Case Closure in Red Box Below MM/YYYY					
						MILESTONE 3														
						MILESTONE 2			MILESTONE 1											
Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24		
Enter an X below each month with earnings above the Trial Work amount for that year																				

Milestone	Eligible?
Phase 1, MS 1	Yes
Phase 1, MS 2	Yes
Phase 1, MS 3	Yes
Phase 1, MS 4	Yes

Year	TWL	SGA Non-Blind	SGA Blind
2014	\$770	\$1,070	\$1,800
2015	\$780	\$1,090	\$1,820
2016	\$810	\$1,130	\$1,820
2017	\$840	\$1,170	\$1,850
2018	\$850	\$1,180	\$1,970
2019	\$850	\$1,220	\$2,040
2020	\$910	\$1,260	\$2,110
2021	\$940	\$1,310	\$2,190
2022	\$970	\$1,350	\$2,280
2023	\$1,050	\$1,470	\$2,480
2024	\$1,110	\$1,550	\$2,550

EN Signature _____ Date _____

Form: Proof of Relationship (PoR)

- ENs must provide proof of relationship with the Ticketholder when submitting for Phase 1 Milestones 1-3.
- Proof of a relationship can either be established by:
 - submitting paystubs *or*
 - completing a Proof of Relationship Form (PoR).
- Locate the Proof of Relationship Form:
 - Go to www.yourtickettowork.ssa.gov
 - Resources > Forms > Payments

The screenshot shows the 'Proof of Relationship (PoR) Form' from the 'TICKET to Work' website. The form includes the following fields:

- EN Name:
- PID Number:
- Ticketholder Name:
- Ticketholder SSN:
- Ticketholder Telephone:
- Ticketholder Email:
- Ticketholder Address:
- Ticket Assignment Date:
- Ticket Unassignment Date (if applicable):
- Phase 1 Milestone Number (check one):
 - 1
 - 2
 - 3
 - 4

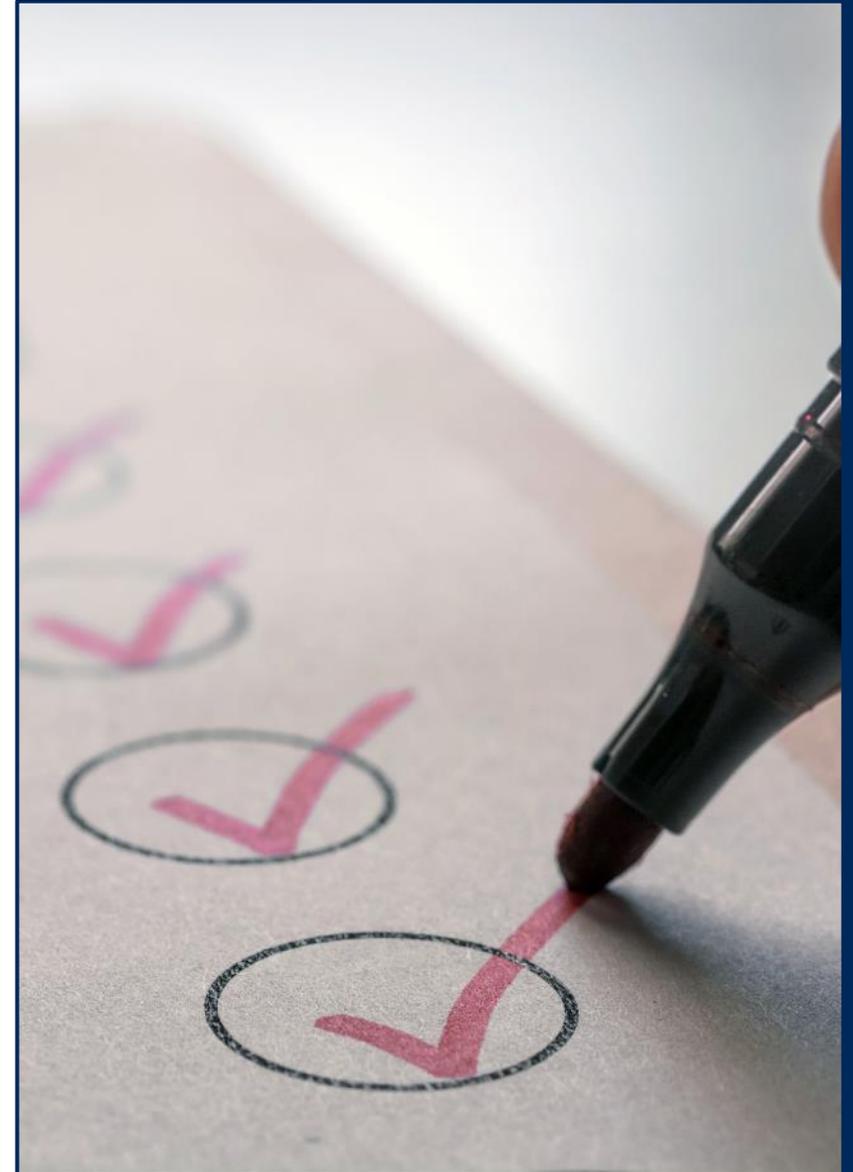


Managing Payments

124,000	35,000	101,000	50,000
105,450	83,000	101,962	68,700
		2,747	

Preparing to Submit a Payment

- Have these items ready:
 - Ticket Portal credentials
 - Payments resources to reference
 - Proof of Relationship
 - For Phase 1 Milestones 1-3
 - Evidence of Earnings
 - Paystubs
 - Employer Prepared Earnings Statement
 - Work Number



Best Ways to Get Paid

Ticket Portal

- View pending and processed payment requests.
- The fastest and recommended way to manage payments.
- Requests processed within 30 calendar days of receipt.

ePay

- SSA processes payments quarterly.
- Phase 1 Milestone 4, Phase 2 Milestones and Outcomes are paid via ePay.
- Processed in SSN order, not Provider ID (PID) so ENs may not see all payments processed at the same time.

Manual Payments

- Submit a Manual Payment if your EN is terminated or there is a technical issue using the Ticket Portal.
- Fax or mail form SSA-1391, evidence of earnings and Proof of Relationship (PoR) for Phase 1 Milestones 1-3.

SOCIAL SECURITY ADMINISTRATION	Form Approved OMB No. 0960-0644
Employment Network Payment Request Form	
This form may be used to request Evidentiary Payment Requests (EPRs) or Certification Payment Requests (CPRs)	
To Ensure Prompt And Accurate Payment To Your Employment Network, Please Complete The Following Form And Attach Any Acceptable Earnings Information Required	
I. Employment Network Information	
EN Organization Name: _____	
DUNS Number: _____	
Is the financial institution and bank account information provided to SAM.GOV current?	
<input type="checkbox"/> Yes <input type="checkbox"/> No (if No, please contact SAM @ 1-866-606-8220 before submitting this request)	
Incorrect Or Outdated Information May Delay Or Prevent Payment Issuance To Your Employment Network	
II. Ticket-holder Information	
Ticket-holder's Name: _____	
Ticket Number/Social Security Number: _____	
Name of Ticket Holder's Employer: _____	
Employer's Address (if available): _____	
Payment method for this Ticket Assignment:	
<input type="checkbox"/> Outcome Payment Method <input type="checkbox"/> Milestone-Outcome Payment Method	
III. Phase 1 Milestone 1 Earnings Information	
Select one option only if requesting a Phase I Milestone 1 payment.	
<input type="checkbox"/> The beneficiary achieved Trail Work Level (TWL) earnings during the calendar claim month.	
<input type="checkbox"/> The beneficiary achieved less than TWL, but expects to achieve TWL earnings within the next 2 months.	
<input type="checkbox"/> The beneficiary achieved less than TWL earnings and is not expected to achieve TWL earnings within the next 2 months.	
Form SSA-1391 (02-2013)	Page 1

Eligibility for ePay

- ENs are not eligible for ePay if:
 - They have not passed their annual Services and Supports review
 - Are on Hold or Terminated
- Additionally:
 - Unassigned Tickets are not included in ePay.
 - Initial Personally Identifiable Information (PII) violations will remove your EN from ePay for 3 months or one ePay file.
 - During this time, ENs must submit payment requests via the Ticket Portal.

Phase 1 Milestones

- Use the **18-month Lookback Tool** with your Ticketholder to help you gauge which Phase 1 Milestones you may be eligible for.
- TPM will complete their own 18-month Lookback Tool using earnings available in SSA's database, so the Ticketholder may be eligible for fewer Phase 1 Milestones than anticipated.
 - **Example:** There may be TWL earnings one month prior to Ticket assignment date that will exclude Phase 1 Milestone 1.
- **Note:** If applicable, after a Phase 1 Milestone has been requested, TPM will automatically deny all ineligible Phase 1 Milestones due to 18-month look back or VR involvement:
 - Successful closure within 18 months prior to Ticket assignment date or Cost Reimbursement payment.

Phase 1 Milestones and PoR

- ENs must complete and submit the PoR form when submitting for Phase 1 Milestones 1–3 if earnings are based on the Work Number Report, Employer Prepared Earnings Statement or earnings already established in the Portal.
- ENs must document all services on the PoR Form for the milestone period and provide specific dates for all services provided.
- ENs can use their own form to document services with dates, but the form must be signed by the EN.

Proof of Earnings and Relationship: Phase 1 Milestones 1-3

Acceptable Proof of Earnings	Required Proof of Relationship
Paystubs	None
The Work Number	PoR Form
Employer Prepared Earnings Statement	PoR Form
Already Established in SSA's System	PoR Form

Phase 1 Milestone Exclusions - Part 1

- Prior Earnings
 - **Code 12** – Not Eligible for Payment Due to Look Back Earnings
 - This code applies only to Phase 1 Milestone requests. It indicates that TPM found evidence that the beneficiary had monthly earnings at or above the TWL during the 18-month period immediately prior to the Ticket assignment month and after the date of disability onset.

Phase 1 Milestone Exclusions – Part 2

- VR Involvement
 - **Code 7** – Payment Made Under VR for Same Period
 - This code indicates that the Vocational Rehabilitation (VR) agency received a Cost Reimbursement payment for this beneficiary. No Phase 1 Milestones can be paid.
 - **Code 8** – Due to VR Services Phase 1 Milestone Can't Be Paid
 - This code indicates that there is evidence in SSA's database that the beneficiary had a record of a successful case closure within 18 months prior to Ticket assignment date with a State VR agency. No Phase 1 Milestones can be paid.

Monitoring Payments Requested/Made

- Before submitting a new payment request, review key screens on the Ticket Portal:
 - “List SSA Beneficiaries Currently Assigned to Me”
 - “View Ticket payments already made to me”
 - “View all pending Ticket payments for me”
- Verify payment requests are being made in order.

Phase 2 Milestones

- SGA earnings are required for Phase 2 Milestones.
- Claim months from Phase 1 Milestones cannot be used for Phase 2 Milestones.
 - **Example:** Even though Joe had earnings above SGA in January, since those earnings are used to satisfy P1M1, they cannot be used again to submit a claim for the first Phase 2 Milestone.
- Phase 1 and Phase 2 Milestones are no longer available once a Ticketholder reaches Outcome status.

Outcome Payments

- Outcome Period:
 - When a Ticketholder is in suspense of pay for benefits due to work or earnings and
 - Has SGA earnings.
- Once a Ticketholder reaches the Outcome phase, remaining Phase 1 and 2 Milestones cannot be paid.
 - Any eligible milestone payments remaining can be paid out during a reconciliation payment after the 12th outcome payment is processed.
 - Even if a Ticketholder moves back into current pay status, Phase 1 and 2 Milestones can no longer be requested.
- ENs should encourage wage reporting.



Tracking Payment Status

Track the status of submitted payment requests using:

- Ticket Portal (preferred)
 - Provides real-time updates.
- EN Payments Help Desk
 - For tracking payments older than 30 days from when they were submitted.
 - Send requests using the Work Case (WC) number:
 - Email:
ENPaymentsHelpDesk@yourtickettowork.ssa.gov
 - Call: 1-866-949-3687
 - Allow 5 days for response.



Questions

Questions

- Please feel free to ask a question in the MS Teams chat section.
- If joining via phone and you wish to ask a question:
 - Press *5 to raise your hand and we will unmute your phone.
 - Press *6 to speak.
- If joining via MS Teams and you wish to ask a question aloud:
 - Raise your hand and we will unmute your mic.
- Please limit questions to one per participant. You may send additional questions or comments to: ENOperations@yourtickettowork.ssa.gov

Payments Resources

Find the following payments related resources at [Resources - yourtickettowork.ssa.gov](https://yourtickettowork.ssa.gov/resources)

- [Forms - yourtickettowork.ssa.gov](https://yourtickettowork.ssa.gov/forms)
 - Proof of Relationship (PoR) form
- [Resource Documents - yourtickettowork.ssa.gov](https://yourtickettowork.ssa.gov/resource-documents)
 - EN Payments Checklist
 - Payments at a Glance
 - 18-Month Lookback Tool

Upcoming Events

- February 28: WISE
- March 13: EN Essentials: Taking a Deeper Dive into Payments
- March 19: Quarterly All EN Call
- May 7: Quarterly All EN Payments Call

2024 Calendar of Events:

- [Calendar of Events - yourtickettowork.ssa.gov](https://yourtickettowork.ssa.gov/calendar-of-events)

Email the EN Development and Training Department at ENOperations@yourtickettowork.ssa.gov with feedback, recommendations or ideas for future EN Essentials events.

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