



Quarterly All Employment Network (EN) Payments Call

April 24, 2018 • 3:00 – 4:00 p.m. ET

Participant Dial-in Number: (888) 394-8218 • Conference ID: 197-9120

Quarterly All EN Payments Call Agenda

1. Announcements
2. Reconciliation Payments
3. Submitting Payment Requests
4. Submitting Manual Payment Requests
5. Erroneous Unassignments or Ticket Terminations
6. 18-Month Lookback Tool
7. Most Common Payment Denials
8. Ticket Program Available Resources
9. Question and Answer Forum

Announcements

Ticket Portal Secure Training Site

- The Ticket Portal secure training site is no longer available
 - Does not impact the Ticket Portal
- To request a copy of the Ticket Portal user guide or for questions about the Ticket Portal, contact the Provider Support Helpline
 - **Email:** ENSystemsHelp@yourtickettowork.ssa.gov
 - **Phone:** 866-949-3687, Monday - Friday from 9 a.m. - 5 p.m. ET.

CCR SAM Registration

- Central Contractor Registration (CCR) System for Award Management (SAM) registration must be renewed and validated at least every 12 months

Reconciliation Payments

- Ticketholders move into Outcome payment phase when they continue to work and have monthly earnings at or above Substantial Gainful Activity (SGA) level and are no longer receiving Federal cash benefits
- If a Ticketholder moves into the Outcome payment phase before an EN receives all available Milestone payments, Social Security Administration (Social Security) processes a reconciliation payment
 - Social Security processes a reconciliation payment after TPM processes the 12th Outcome payment
 - The one-time, lump-sum payment will be equal to any unpaid available Milestone payments that would otherwise have been available to the EN with the Ticket assignment
- ENs do not have to submit for a reconciliation payment
- Unavailable Phase 1 Milestone payments due to Look Back earnings and State Vocational Rehabilitation (VR) agency successful closures are not included in the lump-sum reconciliation payment

Reconciliation Payments Scenario

SSDI Ticketholder

Phase 2 Milestones: Up to 11 months

- **Ticket status:** Receiving Federal cash benefits
- **Payments received by EN:** Phase 1 Milestones 1 – 4 and Phase 2 Milestones 1 – 5
- **Ticket status changes:** No longer receiving Federal cash benefits due to work and earnings but continues to work and have monthly earnings at or above SGA or SGA Blind
- Ticketholder moves into the Outcome payment phase
- **Outcome payments received by EN:** Outcomes 1 – 12
- Social Security processes a reconciliation payment equal to the amount of the 6 unpaid Phase 2 Milestones (Phase 2 Milestones 6 – 11)

Submitting Payment Requests

- To reduce Employment Networks' (EN) administrative burden of creating and submitting payment requests to the Ticket Program Manager (TPM), Social Security implemented an automated payment process called E-PAY
 - The intent of the E-PAY process is to provide ENs a means to obtain payments when unable to obtain earnings evidence once Social Security eliminated the Certification Payment Process (including Self-Employment Insurance (SEI) claims)
 - This automated payment process does not replace the process of ENs submitting payment requests via the Ticket Portal
- Submitting payment requests via the Ticket Portal if ENs have primary evidence should be the first option for submitting payment requests to TPM
 - Due to Social Security rules, some potential claims will not be eligible for payment under the E-PAY process

Submitting Manual Payment Requests

- Effective September 4, 2017, all payment requests must be submitted through the Ticket Portal
- There are some instances when an EN may not be able to submit a request through the Ticket Portal and must submit the request to TPM manually via fax or mail such as:
 - Claims that have previously been denied due to missing documentation or an inadequate Certification of Services (COS)
 - Some Phase 1 Milestones due to system pulling information from unverified earnings
- When submitting a payment request manually, ENs must complete Form 1391: EN Payment Request Form <https://yourtickettowork.ssa.gov/information-center/forms.html> and provide evidence of earnings

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Erroneous Unassignments or Ticket Terminations

- If you believe that a Ticket was erroneously terminated or unassigned from your EN, please contact the Program Integrity team to research the issue at ProgramIntegrity@yourtickettowork.ssa.gov
 - Securely submit the Ticket information and supporting documentation, such as an Individual Work Plan (IWP), to the in-box to confirm if the unassignment or termination was due to a systems error
- The Ticket information and any submitted documents should be encrypted using your EN's TTW PIN i.e., TTWE + the last four digits of your award number

18-Month Lookback Tool

18 Month Prior Earnings Look-Back Worksheet																																																																																			
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18-Month Lookback Tool Rules

- If a beneficiary had Trial Work Level (TWL) earnings during some or all of the 18 months prior to the first Ticket assignment and after the Date of Disability Onset (DDO), some or all of the Phase 1 Milestones may be excluded from payment
 - The earnings criteria used for payment of Phase 1 Milestones are reversed to determine eligibility for payment based on the 18-month Lookback rule
- If the DDO is within the 18 months prior to Ticket assignment, then the lookback for TWL earnings ends at the DDO date

18-Month Lookback Tool Exclusions

Phase 1 Milestone 1

- P1M1 is not available if a beneficiary worked with earnings above the TWL in the calendar month immediately prior to Ticket assignment

Phase 1 Milestone 2

- P1M2 is not available if a beneficiary worked with earnings above the TWL in 3 of the 6 months immediately prior to Ticket assignment and after the DDO

Phase 1 Milestone 3

- P1M3 is not available if a beneficiary worked with earnings above the TWL in 6 of the 12 months immediately prior to Ticket assignment and after the DDO

Phase 1 Milestone 4

- P1M4 is not available if a beneficiary worked with earnings above the TWL in 9 of 18 months immediately prior to Ticket assignment and after the DDO

Disability Onset Date

- The DDO is the date at which an individual became unable to work as a result of a disabling medical condition
 - Social Security determines the DDO
- A new DDO may be established after an approved Expedited Reinstatement (EXR) of benefits or when Social Security approves a beneficiary's new disability application
- If Social Security establishes a new DDO, a new IWP is required for Ticket assignment
 - No payments are available on the old Ticket
 - The 18-month lookback tool includes both the Ticket Assignment Date (TAD) and the DDO
- ENs can obtain a Benefits Planning Query (BPQY) by submitting two Consent for Release of Information forms (SSA-3288) <https://www.ssa.gov/forms/ssa-3288.pdf>.
 - Both forms must be appropriately signed by the beneficiary
 - An electronic signature of the beneficiary is not acceptable

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Using the 18-Month Lookback Tool (1 of 2)

- The 18-Month Lookback tool (Excel spreadsheet) allows ENs or TPM EN Payments staff to enter a Ticket assignment date (far right column) mm/yyyy
 - The tool then populates the 18 months prior to the Ticket assignment date by month/year
 - TPM staff or EN representative will enter an “X” under each month that the beneficiary earnings were at or above TWL

18 Month Prior Earnings Look-Back Worksheet																		Enter Ticket Assignment Date in Red Box Below MM/YYYY	Enter Date of Disability Onset in Red Box Below MM/YYYY				
EN Name:						Beneficiary's Name:						DUNS:								SSN:			
MILESTONE 4																		MILESTONE 1	MILESTONE 2	MILESTONE 3			
Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18						
						X	X	X	X	X	X		X	X			X						
Enter an X below each month with earnings above the Trial Work amount for that year																							

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Using the 18-Month Lookback Tool (2 of 2)

- If a Phase 1 Milestone payment is not available, the color of the Milestone will turn from green to red and a 'No' will populate in the chart below (far left)
 - The 18-Month Lookback tool has the functionality to allow users to enter the DDO and make the calculations
 - With this feature the 18-month period between the DDO and TAD is calculated correctly

18 Month Prior Earnings Look-Back Worksheet

EN Name: _____ Beneficiary's Name: _____
 DUNS: _____ SSN: _____

MILESTONE 4												MILESTONE 3				MILESTONE 2			MILESTONE 1		Enter Ticket Assignment Date in Red Box Below MM/YYYY	Enter Date of Disability Onset in Red Box Below MM/YYYY
Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Jun-17			
									x	x			x	x			x					
Enter an X below each month with earnings above the Trial Work amount for that year																						

Milestone	Eligible?
Phase 1, MS 1	No
Phase 1, MS 2	No
Phase 1, MS 3	Yes
Phase 1, MS 4	Yes

Year	TWL	Non-Blind	SGA Blind
2006	\$620		
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2009	\$700	\$980	\$1,640
2010	\$720	\$1,000	\$1,640
2011	\$720	\$1,000	\$1,640
2012	\$720	\$1,010	\$1,630
2013	\$750	\$1,040	\$1,740
2014	\$770	\$1,070	\$1,800
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2017	\$840	\$1,170	\$1,950
2018	\$850	\$1,180	\$1,970

EN Signature _____ Date _____

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18-Month Look Back Scenario 1

- TAD is 03/2018 and the DDO is 6/2017. Earnings exist above TWL for months 9/2016 - 2/2018
 - User will need to enter an X under each month that TWL earnings exist
- All Phase 1 Milestones would have been denied based on TWL earnings but Phase 1 Milestone 4 is still available because the look back of TWL earnings ended at the DDO (6/2017)

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EN Name:				Beneficiary's Name:															
DUNS:				SSN:															
MILESTONE 4																		Enter Ticket Assignment Date in Red Box Below MM/YYYY	Enter Date of Disability Onset in Red Box Below MM/YYYY
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X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	Enter an X below each month with earnings above the Trial Work amount for that year	

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18-Month Look Back Scenario 2

- TAD is 1/2017 and the DDO is 2/2015
 - Earnings exist above TWL for 9/2015, 10/2015, 12/2015, 2/2016 - 4/2016, 7/2016, 9/2016 and 12/2016
- None of the Phase 1 Milestones are available because all the months with TWL earnings are prior to the TAD and after the DDO

MILESTONE 4																		Enter Ticket Assignment Date in Red Box Below MMYYYY	Enter Date of Disability Onset in Red Box Below MMYYYY	
MILESTONE 3												MILESTONE 2				Enter an X below each month with earnings above the Trial Work amount for that year	Jan-17			Feb-15
						MILESTONE 1						Jan-17	Feb-15							
Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16			Jul-16	Aug-16					
		X	X		X		X	X	X			X		X				X		

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2009	\$700	\$980	\$1,640
2010	\$720	\$1,000	\$1,640
2011	\$720	\$1,000	\$1,640
2012	\$720	\$1,010	\$1,690
2013	\$750	\$1,040	\$1,740

The Most Common Payment Denials

- When TPM denies a payment request or claim, staff assigns a payment denial reason in iTOPSS for each claim
 - Each denial appears in the Ticket Portal under the “List Payments Already Made to Me” screen when ENs select the option “Include Denials”, using the Reference Number or Work Case Number associated with that particular payment request (claim)
- As a part of the process for preparing and submitting payment requests, EN staff should research the following items before submitting a payment request:
 - Ticket Assignment
 - First Available Claim Month
 - Prior VR Services
 - 18-Month Lookback Tool
 - Earnings Documentation

Tips for Avoiding the Most Common Payment Denials (1 of 2)

Code 2 - Beneficiary Receiving Federal Cash Benefits

- In some situations, a beneficiary could have earnings above the SGA level and the EN could have received all Phase 2 Milestones but the beneficiary is still receiving a monthly disability benefit as a result of his/her use of Social Security work incentives
 - Work incentives are special rules that allow a beneficiary to reduce his/her countable income based on things such as work-related expenses or putting money away to fund a Plan to Achieve Self-Support (PASS)
 - The beneficiary may also remain in current pay status until Social Security performs work Continuing Disability Reviews

Tips for Avoiding the Most Common Payment Denials (2 of 2)

Code 12 - Not Eligible for Payment Due to Look Back Earnings

- During the intake process, ENs should discuss each beneficiary's work and earnings history during the prior 18 months
 - While details on earnings during this 18-month period are not required, ENs are required to explore a beneficiary's earnings during the 18 months immediately prior to Ticket assignment as part of the process for developing the IWP
- Once the requesting EN has an indication of the beneficiary's earnings during the 18 months prior to seeking services from an EN, use the handy automated tool that TPM created to assess the potential availability of the Phase 1 Milestones based on the 18-Month Lookback Tool exclusion

Available Ticket Program Resources

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Available Ticket Program Resources

- The Ticket Portal
- Ticket to Work Home: <https://yourtickettowork.ssa.gov>
 - Information Center
 - Upcoming Events
 - Training
 - Resource Documents

EN Payments Help Desk (1 of 2)

- The preferred method of tracking the status of submitted payment requests is to use the Ticket Portal and take advantage of the real-time updates
 - However, if an EN is unable to use the Ticket Portal for any reason, it also has the option to send manual payment status inquiries to the EN Payments Help Desk
- EN Help Desk can be reached by
 - Email: ENPaymentsHelpDesk@yourtickettowork.ssa.gov
 - Toll free: 866-949-3687
- Email inquiries must be password-protected (encrypted) with the EN's personal identification number (PIN) that is on file with the TPM
 - Inquiries must include the EN's DUNS, beneficiary's SSN, and the claim month(s)
 - Allow 5 or more business days for a response

EN Payments Help Desk (2 of 2)

- ENs can also obtain clarification on payment-related issues or explanations of how EN Payments staffs apply Ticket policies and procedures
- EN Payments Help Desk staff perform the following tasks to assist ENs with payment-related issues:
 - Answer EN payment inquiries received through the Payments Help Desk phone line
 - Submit requests to the EN Payments staff for payment reconsideration or for Payment Supervisor review of a payment issue
 - Outreach to ENs to obtain payment-related documentation when EN Payments staff report missing or incomplete information from payment requests ENs submit

TPM Phone & Email Resources

- Technical Assistance
 - Monday thru Friday 9 a.m. – 5 p.m. EST
 - Toll Free: 866-949-3687/TTY: 866-833-2967
 - Option 1: Payments Help Desk
 - Option 2: Systems Help Desk
- Email:
 - enpaymentshelpdesk@yourtickettowork.ssa.gov for payment issues
 - ensystemshelp@yourtickettowork.ssa.gov for questions and issues related to Ticket assignment, the service provider website, and the Ticket Portal



Questions?