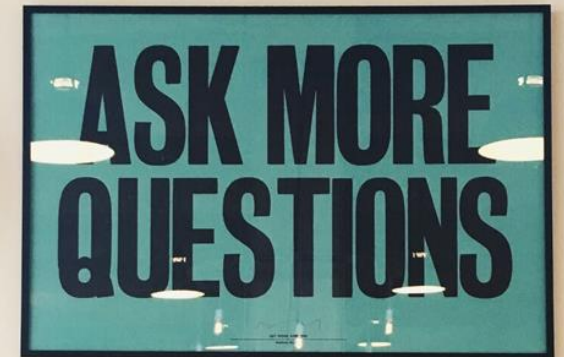
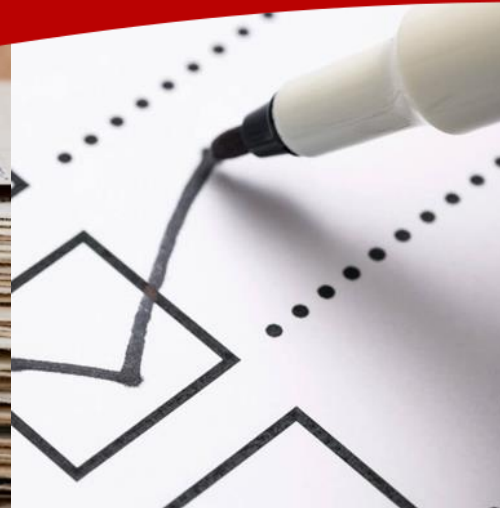


10/30/2018



Social Security's Ticket to Work

All EN Payments Call



Quarterly All EN Payments Call

Agenda

1. Phase 1 Milestone Relationship Requirements (PMRR)
2. Certification of Services (COS)
3. COS Statement Form
4. Ticket Program Available Resources
5. Questions and Answers



Phase 1 Milestone Relationship Requirement (PMRR)

Phase 1 Milestone Relationship Requirement

- Effective August 1, 2018 Social Security implemented a new policy:
 - In order to receive a Phase 1 Milestone payment, ENs **must** submit proof of a relationship in addition to meeting all other payment requirements.
 - If an EN cannot provide sufficient proof of a relationship by submitting the required documentation, the Ticket will be unassigned.

Phase 1 Milestone Relationship Requirement

- ENs should not request a Phase 1 Milestone payment without having proof of earnings and proof of a relationship readily available.
- Both proof of earnings and proof of a relationship must cover the entire Phase 1 Milestone period (e.g., 1 month for P1M1, 3 months for P1M2, 6 months for P1M3, 9 months for P1M4).

Phase 1 Milestone Relationship Requirement

- Please refer to the chart below to see all acceptable forms of evidence for proof of earnings and proof of relationship requirements.

| Acceptable Proof of Earnings | Required Proof of a Relationship |
|--------------------------------------|----------------------------------|
| Paystubs | None |
| The Work Number | Paystub or COS |
| Employer Prepared Earnings Statement | Paystub or COS |
| Already Established in SSA's System | Paystub or COS |

What is Proof of a Relationship?

Proof of a relationship can be either paystubs or documentation of intensive employment support services and monthly contact with beneficiaries during Phase 1 Milestone period.

- ENs **MUST** document all services, including dates ENs provided services to the beneficiary during the entire period of the claim using the COS form.
- Phase 1 Milestones require **monthly contact** with a beneficiary.
- Quarterly contact does not show proof of a relationship.
- If an EN is unable to establish proof of relationship at any point during the Phase 1 Milestone period, the Ticket will be unassigned.

PMRR Scenario 1

- An EN submits 2 claims based on the Portal message “Earnings Already Established”:
 - P1M1 for claim month 07/2017
 - P1M2 for claim month 09/2017
- There are 3 months of earnings to satisfy the earnings requirement. P1M1 requires 1 month of earnings (07/2017) and P1M2 requires 2 additional months of earnings (08/2017 and 09/2017).
- The EN is required to provide proof of a relationship for 7/2017, 8/2017 and 9/2017 by submitting paystubs or documentation with dates and a list of detailed services provided.

PMRR Scenario 2

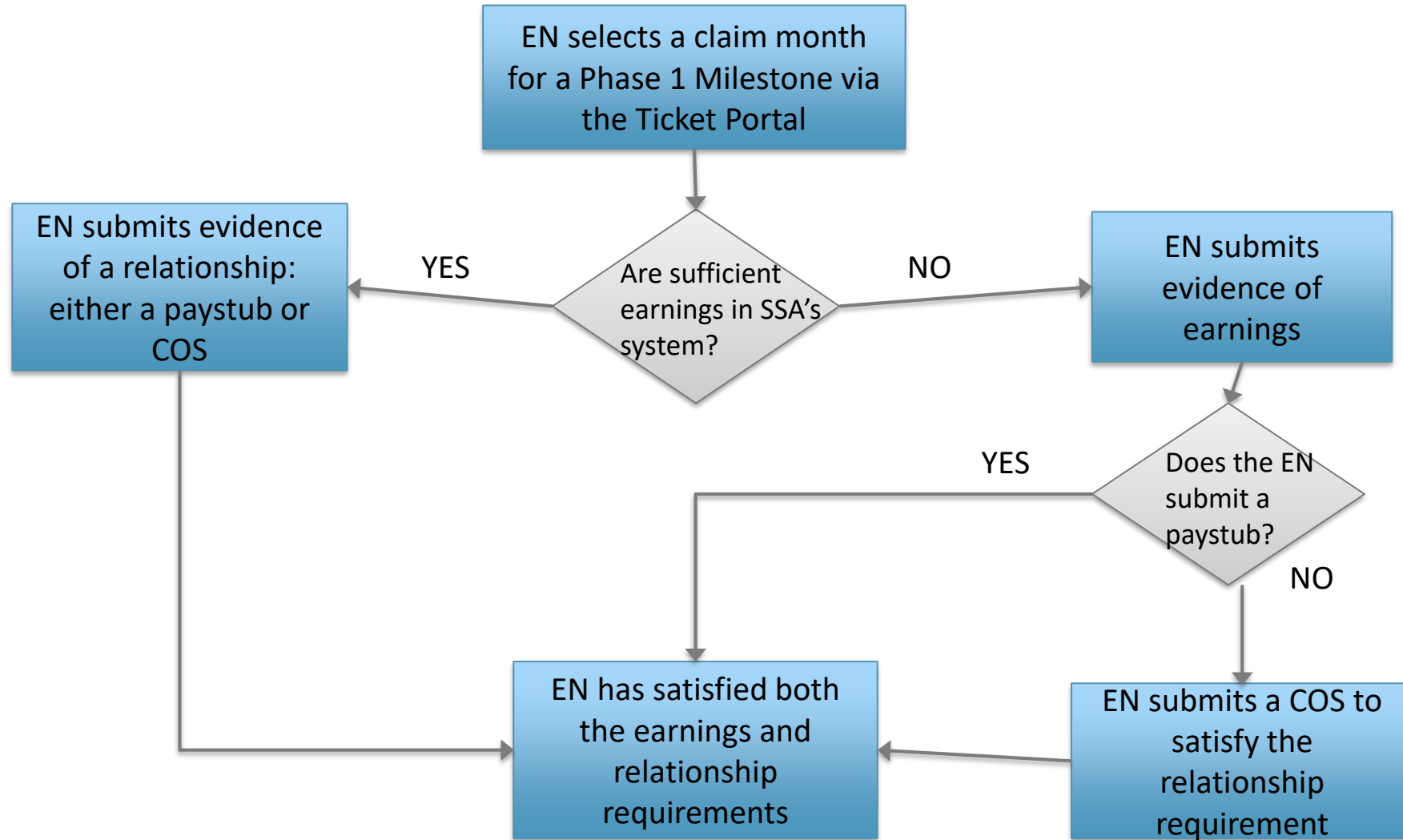
Payments already made to EN prior to the implementation of the Phase 1 Milestone Relationship Requirement (PMRR)

- P1M1 for claim month 02/2018 based on earnings from The Work Number
- P1M2 for claim month 04/2018 based on earnings from The Work Number

EN submits a claim for P1M3 for claim month 07/2018 and includes paystubs for 05/2018, 06/2018 and 07/2018.

- The earnings requirement for P1M3 is 6 months within 12 months. There are 6 months of Trial Work Level (TWL) earnings in the system to satisfy the earnings requirement but only 3 months of paystubs (05/2018 – 07/2018) to satisfy the PMRR requirement.
- The EN is required to provide proof of a relationship for 01/2018 – 04/2018 by submitting paystubs or documentation with dates and a list of detailed services provided during the milestone period.

PMRR Flowchart



Certification of Services (COS)

What are Certification of Services?

- **Certification of Services** – Documentation of services provided to Ticketholders.
- ENs must submit a detailed list of services provided to Ticketholders for 3 purposes:
 - Annual Services and Supports Review
 - Providing proof of a relationship for Phase 1 Milestone payments in lieu of paystubs.
 - Requesting payment after Ticketholder unassigns Ticket.

Certification of Services (COS)

COS for EN Payments vs. Services and Supports Review

| Question | EN Payments | Services and Supports Review |
|---------------------------------------|---|---|
| When do you submit the COS? | To provide proof of a relationship for Phase 1 Milestone payments in lieu of paystubs and when requesting payment for a Ticket that was unassigned by the Ticketholder. | During annual Services and Supports review OR by special request from SSA/TPM |
| How do you submit the COS? | Fax number listed on the Ticket Portal-generated fax cover sheet or 703-893-4020 if manual request. | Fax to 703.893.4020 "ATTN: Services and Supports" or email encrypted attachment to ProgramIntegrity@yourtickettowork.ssa.gov |
| What time period should my COS cover? | All the months required to cover the milestone period or period that is requested for an unassigned Ticket. | Lifetime or the entirety of the Ticket assignment |
| What should you include with the COS? | Date and detailed description of services provided to the Ticketholder during this period. Contact dates and types during the Phase 1 Milestone period | <ul style="list-style-type: none"> Detailed services and supports provided to the Ticketholder throughout the duration of the Ticket assignment Contact dates and types for the duration of the Ticket assignment to confirm maintaining mandatory contacts |
| Who do I contact? | ENPaymentsHelpDesk@yourtickettowork.ssa.gov | ProgramIntegrity@yourtickettowork.ssa.gov |

Acceptable Services for Employment Support (1 of 2)

| Services | Description |
|-------------------------|---|
| Career Counseling | EN must provide one-on-one sessions to assess the beneficiary's skills and educational background to find jobs/trades for which they are qualified. This includes at least one hour of career counseling and guidance. |
| Job Accommodations | A job accommodation is a reasonable adjustment to a job or work environment that makes it possible for an individual with a disability to perform the duties of their job. The EN will consider the beneficiary's limitations along with the job tasks and provide the necessary equipment and/or modifications to assist the beneficiary in performing the job function. This may include providing a ride to and from work, computer equipment/software, or a vehicle modification. |
| Job Training / Coaching | EN can provide comprehensive job training prior to job placement or ongoing training during employment. This training should help the beneficiary excel in a particular set of skills or craft that enables the beneficiary to be placed in employment or retain employment. |

Acceptable Services for Employment Support (2 of 2)

| Services | Description |
|----------------------------|---|
| Job Placement Assistance | <p>Unless the beneficiary was working at Ticket Assignment, the EN must contribute to placing the beneficiary in a job. For example, the EN should provide professional advice regarding resume writing, interview skills, and job search techniques. It can also provide the beneficiary with individualized job leads or establish a relationship with employers to secure a job placement.</p> |
| Ongoing Employment Support | <p>Ongoing support is anything that helps the beneficiary go back to work or keep his or her employment. EN must maintain periodic communication with the beneficiary to encourage and support his/her work efforts.</p> <p>EN should also provide other employment support services that include but are not limited to: giving monetary funds to purchase uniforms or arrange transportation, ongoing training to advance skills, counseling intervention to foster health work relationships, and helping the beneficiary acquire life skills that are critical in sustaining work outcomes (conflict resolution, financial management, etc.).</p> |

COS Statement Form

Example of Passing COS (1 of 3)

EN Name: ABC Employment

DUNS Number: 111222333

Ticketholder Name: Joe Smith

Ticketholder SSN: 123-45-6789

Ticketholder Telephone: (703) 111-2222

Ticketholder Email: SmithJ@email.com

Ticketholder Address: 123 Main Street, Hometown, USA

Ticket Assignment Date: 03/01/2018

Ticket Unassignment Date (if applicable):

Example of Passing COS (2 of 3)



Individual Work Plan (IWP) Addendum: Statement of Services

Please list all services that your EN provided (include date) to the Ticketholder to date. These services are those agreed upon in the IWP to help the Ticketholder reach and sustain his or her long-term employment goals since both parties signed the IWP.

- 02/27/2018 - Developed IWP
- 03/09/2018 - Meet with client to complete resume and job search skills.
- 04/03/2018 - Spoke with client regarding job search
- 04/05/2018 - Sent job leads to client.
- 04/10/2018 - Client called that he started working at \$12.00 / hour.
- 05/29/2018 - Spoke with client how to submit pay stubs.
- 06/11/2018 - Client called to discuss his benefits check. Provided benefits counseling.

Example of Passing COS (3 of 3)

Did you attempt to contact the Ticketholder at least quarterly?

Yes

Dates of contact: See dates listed on page 2.

No

By signing below, the EN affirms having provided the services above to the Ticketholder.

Bob Brown

EN Representative's Name

EN Representative's Signature

Date 06/15/2018

Example of Failing COS (1 of 3)

EN Name: EN Employment Services

DUNS Number: 222333444

Ticketholder Name: Debbie Jones

Ticketholder SSN: 999-88-7777

Ticketholder Telephone: (301) 111-2222

Ticketholder Email: JonesD@email.com

Ticketholder Address: 987 1st Street, Hometown, USA

Ticket Assignment Date: 06/01/2018

Ticket Unassignment Date (if applicable):

Example of Failing COS (2 of 3)



Individual Work Plan (IWP) Addendum: Statement of Services

Please list all services that your EN provided (include date) to the Ticketholder to date. These services are those agreed upon in the IWP to help the Ticketholder reach and sustain his or her long-term employment goals since both parties signed the IWP.

05/27/2018 - Developed IWP

06/09/2018 - Left voice mail message.

08/01/2018 - Left voice mail message.

09/15/2018 - Called client.

Example of Failing COS (3 of 3)

Did you attempt to contact the Ticketholder at least quarterly?

Yes

Dates of contact: See dates listed on page 2.

No

By signing below, the EN affirms having provided the services above to the Ticketholder.

Robert Smith

EN Representative's Name

EN Representative's Signature

Date 09/25/2018

Frequently Asked Questions (1 of 3)

Q: Can I use the same COS form for all Phase 1 Milestones?

A: Yes, as long as the COS provides evidence of a relationship for each month(s) of the payment being requested. You must submit a COS with each Phase 1 Milestone (1-4) payment request (even if it is the same one used before, with the correct months documented).

Q: How should ENs submit Phase 1 requests?

A: ENs must submit Phase 1 milestone payment requests via the Ticket Portal. In some instances, Phase 1 milestone payment requests must be submitted manually (e.g., Portal will not accept the claim month submitted)

Frequently Asked Questions (2 of 3)

Q: Are there any changes to the acceptable forms of primary evidence for payment?

A: No. ENs can still submit paystubs, Employer Prepared Earnings Statements, or The Work Number if earnings are not already in SSA's systems.

Q: If the Ticket Portal shows "Earnings Already Proven", can we continue to request a payment without submitting a paystub?

A: ENs requesting Phase 2 Milestone and Outcome payments do not need to submit a paystub. ENs requesting Phase 1 Milestone payments must submit either a paystub or a COS as proof of a relationship, even with earnings proven on SSA's system.

Q: If we can submit a COS instead of paystubs, how would we know when they actually meet the TWL for a particular month?

A: A COS is not a form of primary earnings evidence. A COS cannot be submitted in lieu of paystubs.

Frequently Asked Questions (3 of 3)

Q: What happens if an EN submits the Phase 1 milestone for the wrong attainment month?

A: TPM will adjust the claim month to ensure the milestones are evaluated for the correct attainment month. The payment request for incorrect claim month will be denied and TPM will create a payment request for the correct month and diary the case. An EN will have 30 days to provide paystubs or a COS for the correct month.

Q: If TPM unassigns a Ticket due to a failed COS determination and the beneficiary requests that the same EN reassign his/her Ticket, what happens with the Phase 1 milestones since the EN previously failed the COS determination.

A: If the Ticket is reassigned to the same EN and the EN is able to submit proof of a relationship with a Phase 1 Milestone payment, the EN is allowed to receive the payment.

Conclusion

TPM Resources

- EN COS Form
 - <https://yourtickettowork.ssa.gov/resources/forms.html>
- Phone
 - Monday thru Friday 9 a.m.–5 p.m. ET
 - Toll Free: 866.949.3687/TTY: 866.833.2967
 - Option 1: Payments Help Desk
 - Option 2: Systems Help Desk
- Email
 - For payment issues:
enpaymentshelpdesk@yourtickettowork.ssa.gov
 - For questions and issues related to Ticket assignment, the service provider website and the Ticket Portal:
ensystemshelp@yourtickettowork.ssa.gov



**ASK MORE
QUESTIONS**

Questions?