Welcome

Kimberly Cutler welcomed everyone to the call. She provided insight into payment processes including: ePay file stats, ePay reminders, proof of relationship requirements, and failed proof of relationship.

Resources were available at the end of the presentation, as well as the Question-and-Answer forum.

Announcements

Failed Proof of Relationship

SSA sent out a GovDelivery message on October 20, 2022, informing ENs that in order to receive Phase 1 Milestone 1 through Phase 1 Milestone 3 payments, ENs must submit proof of relationship with their Ticketholder, in addition to meeting all other payment requirements.

- Showing proof of a relationship with the Ticketholder can be accomplished through submitting pay stubs or a completed Proof of Relationship (PoR) form that documents intensive employment support services and monthly contact with the Ticketholder during the Phase 1 Milestone period.

- The PoR form must list services and dates of services provided to the Ticketholder during the Milestone period.

- ENs will have three opportunities to provide the required proof of relationship for the requested Milestones before the Ticket is unassigned.

ePay File Stats

TPM completed the last ePay file in September 2022, with the following results:

- Processed SSNs: 14,475
- Paid SSNs: 4,412
- Total amount paid: $7,992,149

ePay Reminders

Kimberly informed the ENs that the next ePay would start the week of October 31 and provided the following reminders:

- Phase 1 Milestone 4 is paid via ePay, but ENs must still submit payment requests for Phase 1 Milestones 1-3 through the Ticket Portal with proof of relationship.
- Unassigned Tickets are not included in ePay.
- ENs must have passed their annual Services and Support review.
- The ePay file is processed in order by SSN not Provider ID (PID).
- Phase 1 Milestones 4, Phase 2 Milestones and Outcomes are paid via ePay. ENs are encouraged not to submit for these payment types via the Portal when the ePay file is being processed. Submitting such payments slows down processing and causes duplicate claim months.
- If you submit a request for Phase 1 Milestone 4, Phase 2 Milestones or Outcomes during ePay, that SSN will not be processed until it comes up on the ePay list.
- Please allow TPM to pay all available claims via ePay before requesting via the Portal.
- Personal Identifiable Information (PII) violations will remove your EN from ePay for three months or one ePay file.
  - During this time, you must submit payment requests via the Ticket Portal.
- **Example:**
  - If an EN violates the PII rule while a file is currently being processed (i.e., November), they will be removed from the next ePay file (January).

What is Proof of Relationship?

The next few slides covered proof of relationship requirements when requesting payments for Phase1 Milestones payments.

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

- ENs must document all services, including dates the EN provided services to the Ticketholder during the entire period of the requested claim month(s) if using the PoR form as proof of relationship.

- Phase 1 Milestones require monthly contact with a Ticketholder.

- Quarterly contact does not show proof of relationship.

- If an EN is unable to establish proof of relationship with the Ticketholder at any point during the Phase 1 Milestone period, the Ticket will be unassigned.

Proof of Relationship

All acceptable forms of evidence for proof of earnings and proof of relationship requirements are indicated on the chart below:

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

Proof of Relationship Examples

1. EN submits a payment request for P1M1 @ 04/2022 based on the Portal message "Earnings Already Established"

    - The EN is required to provide proof of relationship with the Ticketholder for 04/2022 by submitting paystubs or completed PoR form that lists services provided during the month of April 2022.

2. EN submits a payment request for P1M2 @ 06/2022 with The Work Number Report as evidence of earnings. Months included in the Milestone period are 04/2022, 05/2022 and 6/2022
    - The EN is required to submit a completed PoR form that lists services provided to the Ticketholder for at least one of the two additional months (i.e., May or June 2022).

3. EN submits a payment request for P1M3 @ 9/2022 with The Work Number Report as evidence of earnings. Months included in the Milestone period are 04/2022, 05/2022, 6/2022, 07/2022, 08/2022 and 09/2022.

    - The EN is required to submit a completed PoR form that lists services provided to the Ticketholder for at least one of the three additional months (i.e., July, August, September 2022).

Kimberly provided examples of a PoR form that passes review.

Passed PoR (1 of 2)

Proof of Relationship (PoR) Form

EN Name: ABC

PID Number: 123456789

Ticketholder Name: John Doe

Ticketholder SSN: 111-11-1111

Ticketholder Telephone: (000) 111-1111

Ticketholder Email: JD@yahoo.com

Ticketholder Address: 1234 Somewhere Over the Rainbow Sunshine, USA

Ticket Assignment Date: 12/13/2021

Ticket Unassignment Date (if applicable):

Phase 1 Milestone Number (check one):

☐ 1   ☒ 2   ☐ 3   ☐ 4

Passed PoR (2 of 2)

Document Contact and/or Services Provided:

Please list the dates and a description of the contact or services that your EN provided to the Ticketholder. 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.

Date	Description of Services Provided or Contact
12/16/2021	Met with Ticketholder and developed resume
12/18/2021	Spoke with Ticketholder and answered questions about work incentatives
12/21/2022	Called Tickholder and walked him through applying for jobs
02/04/2022	Ticketholder called to let us know he got a job
03/08/2022	Spoke with Ticketholder and things are going well with his job
04/12/2022	Emailed information about how to get bus tokens to help get to work some days
05/10/2022	Checked with Ticketholder to see how things were going with his job
06/25/2022	Emailed Ticketholder holder with requested information for reporting wages to SSA.

Social Security may verify the information above with the Ticketholder.

TICKET to Work

During the call, Kimberly also shared an example of a failed PoR form.

Failed PoR (1 of 2)

Proof of Relationship (PoR) Form

EN Name:	ABC
PID Number:	123456789
Ticketholder Name:	John Doe
Ticketholder SSN:	111-11-1111
Ticketholder Telephone:	(000) 111-1111
Ticketholder Email:	JD@yahoo.com
Ticketholder Address:	1234 Somewhere Over the Rainbow Sunshine, USA

Ticket Assignment Date: 12/13/2021

Ticket Unassignment Date (if applicable):

Phase 1 Milestone Number (check one):

☐ 1   ☒ 2   ☐ 3   ☐ 4

Failed PoR (2 of 3)

Document Contact and/or Services Provided:

Please list the dates and a description of the contact or services that your EN provided to the Ticketholder. 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.

Date	Description of Services Provided or Contact
12/16/2021	Met with Ticketholder and developed resume
12/18/2021	Spoke with Ticketholder and answered questions about work incentatives
12/21/2022	Lvm for Ticketholder to call me back
02/04/2022	Sent email to Ticketholder to mail in paystubs
04/08/2022	Spoke with Ticketholder and discussed how to get bus tokens for transportion to work
06/06/2022	Called but was unable to leave a message because vm was full

Social Security may verify the information above with the Ticketholder.

TICKET to Work

Failed Proof of Relationship

Kimberly provided information about what happens if an EN is unable to establish proof of Relationship with their Ticketholders:

- If an EN is unable to establish proof of relationship with the Ticketholder at any point during the Phase 1 Milestone period, the Ticket will be unassigned.

- If an EN submits for a Phase 1 Milestone payment and the PoR submitted has failed the PoR assessment twice:

    - TPM will reach out to the EN to submit a new payment request with proof of relationship.
    - Failure to provide proof of relationship with the third payment request will result in the unassignment of the Ticket.

All EN payments forms are located on the Ticket to Work website
- https://yourtickettowork.ssa.gov/resources/forms.html

Payments Topic

Kimberly invited ENs to share topics that they would be interested in discussing through this forum. Kimberly reminded ENs that the goal of the quarterly All EN payments call is to help educate ENs and provide clarification on processes and procedures related to payments. She encouraged ENs to send their topics to the EN Payments Help Desk at enpaymentshelpdesk@yourtickettowork.ssa.gov.

TPM Resources

- Phone
    - Monday through Friday 9 a.m. – 5 p.m. ET
    - Toll Free: 866.949.3687 / TTY: 866.833.2967
        - Option 1: Beneficiary Help Desk; Option 2: Payments Help Desk; Option 3: 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

Questions and Answers

A question-and-answer period followed, which is part of the call recording and transcript.