All EN Payments Call Transcript
January 31, 2023

Katherine Jett: Thank you for joining today's quarterly All EN Payments Call. There is a short delay, but the call will start momentarily. Thank you.

Good afternoon, everyone, and welcome to the first quarterly All EN Payments Call for 2023. My name is Katherine Jett, the TPM Project Coordinator and your moderator for today's call.

Before we begin with our agenda and presentation, I would like to review a few logistics and housekeeping items:

- First, this meeting is being recorded and a transcription is being captured.
- Please remain muted at all times during the call unless called upon by the facilitator.
- Please feel free to ask a question in the MS Teams chat section.
- If joining via phone and you wish to ask a question, raise your hand utilizing star 5 and you will be unmuted by the facilitator. Then press star 6 to unmute yourself.
- Please limit questions to one per participant.
- Do not duplicate questions. Additional questions or comments can be sent to EN Payments Helpdesk at yourtickettowork.ssa.gov.
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Thank you in advance for your participation.

Today's quarterly All EN Payments Call is scheduled for 60 minutes and now to the agenda.

On our agenda today we will cover:

- Welcome A
- Announcements
- End of year stats
- 2023 Trial Work Level, SGA, and Blind SGA amounts
- 2023 Ticket Payment rates
- ePay file stats
- ePay reminders
- Payment reminders
- Resources, the question-and-answer forum

And at this time, it is my pleasure to introduce the TPM EN Payments manager and your host for today's call, Kimberly Cutler.

Welcome, Kimberly.

Kimberly Cutler: Thank you so much, Katherine. Good afternoon, everyone, and thank you so much for joining. As Katherine said, this is our first All EN Payments Call of 2023. That is interesting to say that we are already in 2023, but welcome to today's call. First, I want to go over an announcement. Some of you guys may have seen this already, but we sent out a GovDelivery message letting you know that the 2023 payments resources are now available on our website. That would be the 2023 Payments at a Glance, the 18-Month Look Back tool and the Monthly Earnings Estimator tool. Those are now all available on the Ticket to Work website.

You can actually download that information in the resource documents section of Your Ticket to Work website. So again, if you haven't seen it already, we sent out that GovDelivery message and you will be able to link over from that message to the Resource section on the Your Ticket to Work website. I know on the last quarterly call, and I think the All EN Call, there were a lot of questions looking for the 2023 Payments at a Glance.

So, we just want to let you know that this information is now available and if you have questions about your payment method, when you go look at the resource documents, please reach out to the EN Service team, and here on this slide you can see that email address. So, if you have questions about your payment method that you selected as an EN, you're going to reach out to EN Service@ssa.gov.

So now we are going to move into our agenda topics, starting with the end-of-year stats. So, for our 2022 end-of-year stats, the actual total dollar amount paid was $127,223,310. These are our end-of-year stats for 2022 total payments that were made last year. There were 186,859 payments made and 84,317 denials.

Of the denials, the most common denial reason that we see is the O2 Denial, which is the beneficiary receiving federal cash benefits. And of course, we see that a lot when ENs are requesting for a Milestone payment or if they are requesting for an Outcome payment and the beneficiary is still receiving a federal cash benefit. So that is the most common denial reason that we actually see. And that was the top denial reason in 2022.

We also like to let you guys know that the 2023 Payments at a Glance is now available. Also wanted to provide the 2023 Trial Work Level (TWL) and Substantial Gainful Activity (SGA) amounts. So, for 2023, the TWL amount is $1,050; the SGA or Substantial Gainful Activity amount is $1,470 and that's for non-blind blind beneficiaries. The SGA for 2023 is $2,460 for blind beneficiaries.

We just wanted to make sure that you have that information as well. That is your 2023 Trial Work Level and Substantial Gainful Activity amounts.

We also have a lot of information for you on today's call. We wanted to provide the 2023 Ticket Payment rates and you will be able to see this information on the Payments at a Glance. If you are under the Milestone Outcome method for payments, once your beneficiary reaches a certain milestone for SSI payments, for Phase 1 Milestones you will receive $1,645.00. Phase 2 Milestones is $277.00, and Outcomes is $277.00 as well. If you are servicing a SSDI beneficiary, once they reach certain milestones for Phase 1 Milestones, your payment as an EN would be the same, $1,645.00. So for Phase 2 Milestones it's $493.00 and Outcomes for SSDI payments is $493.00.

Now, if you selected your payment method as an EN for the Outcome-only method, then for SSI your payments would be $516.00 and for SSDI it's $918.00. Again, you will be able to see this information and how it breaks down on the Payments at a Glance, but we just wanted to make sure you have this available as well.

Now that we have given you all the rates for 2023, we want to go into the ePay file stats. This is a quarterly file that we receive from SSA. SSA and TPM staff process the ePay file. So, the last ePay file was completed in December of 2022.

We wanted to just provide some stats from that last ePay file. So, for processing totals, there were over 13,000 total claims that were processed, 4,294 SSN that were processed, and for that last ePay file that we completed in December, we paid out over $7 million. So again, each quarter once we complete the ePay file, we like to show you guys the results of that ePay file. And so this was from the last file and just want to note too that TPM started processing the January ePay file yesterday. So you should have seen a note in the Portal alerting you of the fact that we did start processing our first file of 2023 and that started yesterday.

So of course, you know now that we are processing the ePay file. We always like to provide the reminders right for processing ePay. So just remember that Phase 1 Milestones 4, are paid via ePay if it's available to your EN, but ENs must still submit payment requests for Phase 1 Milestones 1 through 3 through the Ticket Portal. Please remember when you're requesting Phase 1 Milestones 1 through 3, that you must provide your proof of relationship. Unassigned Tickets are not included on the ePay file. ENs must have passed their Annual Services and Supports reviews. The ePay file is processed in SSN order and not Provider ID or PID. And we always want to mention that because we do get some questions from ENs. Once we start processing the ePay file, you may see that you're getting a lot of payments.
Then you're not getting as many and then it picks back up and that's because we're not processing it based on PID. We are processing based on SSN.

Now please remember guys — and you have done an amazing job since we made this announcement about the ePay file —- but again, Phase 1 Milestones 4, Phase 2 Milestones and Outcomes are paid via ePay. So you guys are encouraged not to submit for those payment types via the Portal when we're processing the EN portion of the ePay file. Submitting for such payments actually slows us down because it causes duplicate months. Remember, for Phase 1 Milestones 4, Phase 2 Milestones and Outcomes, we're going to use the information that's available to us in SSA database and we're going to make those payments for you. And so, we do ask that you let the ePay file take its course. And as I mentioned before, we will place a note in the Portal that we've started processing the file, the EN tab. And then once we've completed the EN tab, we will also post that information in the Portal as well.

So, we just encourage you to let us process those payments rather than you submitting them through the Portal. Now if you do submit such payment; Phase — 1 Milestone 4, Phase 2 Milestones or Outcomes during ePay — that SSN will not be processed until it comes up on the ePay file. So just let it take its course with those types of cases. That's why we just wanted to add that as a note. Thank you, because we announced this and encourage this, I think a couple of ePay files ago and we actually were able to see a difference because when we are processing the ePay file, we are still processing Portal submitted claims.

I don't want you guys to think that everything stops because we're processing ePay. We do have dedicated staff that process Portal claims and ePay claims at the same time. So, we just wanted to kind of put that out there as well.

I am going to move on to my next slide with the continuation of the ePay reminders. Please note that PII violations will remove you or remove your EN from the ePay file for three months or one ePay file. During this time you will have to submit all of your payment requests through the Portal. So, your Phase 1 Milestones 1 through 4, Phase 2 Milestones and Outcomes will all have to come through the Portal for payment request. You may ask, OK, Kim, so when you say remove for three months or for one ePay file what do you mean? So, if an EN violates the PII rule while the file is currently being processed.

So, let's say like right now we've started the ePay file in January. Let's say that your EN has a PII violation in February. You’re already on the start of this ePay, so we will finish this ePay file. So, your EN will be removed from the next ePay file. So, the ePay files are like we said, they're quarterly. We process the ePay file each quarter. So, the example I gave, if we are in the middle of our January file and if there's a PII violation then your EN will be removed from the next file, which will run in April. So that is the example we just wanted to provide. Just remember guys, please do not email any personal identifiable information. If you have questions about a payment request or a denial, please you can email the Helpdesk using your Work case number or the SSA Reference Number from the Portal, but please do not email any PII. You cannot attach it and it cannot be in the body of the email.

Now we wanted to provide you all with just some friendly reminders when you're requesting payments. Just remember that ENs shall request a payment no later than 24 months following the month the Ticketholder’s work and earnings meet the criteria for SSA to make the payment. As soon as you have that information available, please make sure you are requesting it because we do have an aged claim rule. If you're requesting a claim month that's outside of the 24-month window from when they actually earn the money, then your case will be denied. So please make sure you are very mindful of that.

Please note for Phase 1 Milestones 1 through 4, there may be exclusions when requesting those payments. Phase 1 Milestones 1 through 4 are not available if the State Vocational Rehabilitation agency or the VR received a Cost Reimbursement payment. If the state VR received a Cost Reimbursement payment for that Ticketholder, then that will exclude all of the Phase 1 Milestones. You as an EN, of course, can assign the Ticket and still receive payment, but your agency would start with your Phase 2 Milestones and eventually move to Outcome payments. Phase 1 Milestones are off the table if the Vocational Rehabilitation agency successfully closed the case within 18 months prior to Ticket assignment to your EN. So, two things that involves the VR. If the VR received a Cost Reimbursement payment or if the VR closed the case successfully within 18 months prior to you as an EN assigning the Ticket. So those are two things that will remove your Phase 1 Milestones 1 through 4. Also, earnings at or above Trial Work Level that they are found within 18 months prior to Ticket assignment date. The difference with that is if there's VR involvement with a Cost Reimbursement payment or successful closure within 18 months, that excludes all of the Phase 1 Milestones from an EN for payment. When it comes to earnings, we look at an 18-month period of earnings. If there are prior earnings within an 18-month period, it depends on when the Ticketholder actually earned the money that may exclude all or some of your payments. And I'm pretty sure you guys have seen that; when you submit payment and there are prior earnings, so Phase 1 Milestones 1 and 2 may be excluded because of the window of time within that 18 months where the earnings of the Ticketholder actually fall. Those earnings may exclude you from Phase 1 Milestones 1 and 2, but then you would be able to get Phase 1 Milestones 3 and 4, as long as all other payment criteria are met. So just wanted to explain the difference. Just know if you as an EN request payment for Phase 1 Milestone, we will do our due diligence. We will complete the 18-Month Look Back tool based on earnings that you guys send (pay stubs, The Work Number report, Employer Prepared Earnings Statement) along with earnings information that is available to us in the SSA database. We will use all of that information to complete the 18- Month Look Back. If you're not entitled or eligible to receive some or none of the Phase 1,2,3 or 4 Milestones, we will go in and deny those Milestones. You may only request Phase 1 Milestones 1, but again, we're going to do our look back based on the earnings we have available, and it may show that you are not eligible for any of them. Then we will create those cases and deny them.

We are proactively using earnings information to address all of your Phase 1s, because payments must be made in order. So, if you see that your request for a Phase 1 Milestone 1 was denied and you do not see that Phase 1 Milestones 2, 3 or 4 were denied, then you would go ahead and request for your next Phase 1 Milestones if it's denied based on an exclusion. Let me just say that you can see your denials in the Portal, so you would know exactly what the denial reason is for. Just wanted to make sure that you all know that is what we do. We perform an 18-month look back using the earnings that we have available.

One other thing I wanted to mention as a reminder is when there are multiple Ticket assignments to different ENs, the 18-Month Look Back tool is based on the first Ticket assignment date. So, we did have some ENs with questions about that. So if the Ticket is assigned to ABC EN and then EFG gets the Ticket, we're going to do our 18-month look back from the very first Ticket assignment date.

I know that some ENs may say, hey, I know I'm not entitled to get Phase 1 Milestones because I have prior earnings. But it's earnings prior to right when they assign the Ticket, but we're going to look at the Ticket assignment date from the first time the Ticket was assigned. Just want to put that as a reminder.

ENs must provide proof of relationship with the Ticketholder when requesting payment for Phase 1 Milestones 1 through Phase 1 Milestone 3. I know we've mentioned this a few times but just really want you to know that when you are requesting for Phase 1 Milestones 1 through 3, please make sure that you are submitting your proof of relationship. Proof of relationship can be established if you are submitting pay stubs because pay stubs are a standalone as proof of relationship.

So, if you're requesting payment for Phase 1 Milestones 1 through 3 and you're submitting your pay stubs, that is proof you have a relationship with the client and you're contacting them and you're talking to them because you were able to get their pay stubs. So that is your proof. You can use pay stubs or you can use a completed Proof of Relationship form, also known as a PoR form. If you're submitting evidence of earnings and using The Work Number report or the Employer Prepared Earnings statement, then you want to send in the PoR form. We will look at evidence submitted to see if it satisfies the earnings requirement. But then you also need to send in a completed Proof of Relationship form or PoR. So please make sure that you all are doing that. ENs will have three opportunities to provide the required proof of relationship for the requested Milestone period before the Ticket is unassigned. So again guys, we do have the denial reasons. If you are not providing proof of relationship, your case will be denied, and you will see that denial reason in the Portal. If we deny that case, you'll have three times to show us the proof. If you are unable to establish proof of relationship, then the Ticket will be unassigned. Payments must be made in order so, if you're requesting a Phase 1 Milestones 1 payment, but you are unable to establish proof of relationship with that Ticketholder then we're not able to say, oh, they can't show proof for Phase 1 Milestone 1 so let's move to Phase 1 Milestone 2 because payments must be made in order. If you are unable to establish proof of relationship you will have three times of submitting a request and then that Ticket will be unassigned.

Next reminder, once the Ticketholder enters the Outcome period, which means no longer receiving a federal cash benefit, then Phase 1 Milestones and Phase 2 Milestones are no longer available. Any missed Milestones will be picked up at reconciliation once the EN receives the 12th Outcome payment. I should have said any missed a*vailable* Milestone payments. So again, just wanted you to know you may receive Phase 1 Milestones 1 and 2 and then the benefits go into suspense because you're doing such a good job with your services provided to the Ticketholders working and so the benefits go into suspense due to work or earnings and they are no longer receiving a federal cash benefit. As long as they are meeting the earnings requirement of SGA, then your EN will be able to receive Outcome payments. Once your EN receives the 12th Outcome payment, any Phase 1 Milestones or Phase 2 Milestones that were missed, you will receive those in a reconciliation payment. I wanted to mention, if the Phase 1 Milestones were excluded because of prior earnings or VR involvement, then they are excluded. They are always off the table, so those would not be picked up in reconciliation payments. It's only the Phase 1 Milestones and Phase 2 Milestones that you were eligible for. Once benefits go into suspense, we cannot go back and pay Milestones through a regular payment request. But they will be picked up after a 12th Outcome payment has been made to the EN.

We have an amazing Payments Helpdesk, right? I know you guys are familiar with them. You can contact them via phone, or you can email them. When the Payment Technicians need additional information before we can make a payment determination, we will perform an outreach via email to the EN for additional information. When we send that outreach to you guys for that additional information, ENs must provide the required information within nine business days of receipt of the email or the case will be denied. Once it is denied, you would have to resubmit your payment request again. So please just be very mindful of the outreach emails that come from the Helpdesk. The outreach email provides you with the information that we need. We will place that case in what we call a diary status while we are waiting those nine business days for you to send that information in. If we do not receive that information within nine business days, then your case will be denied. And of course, I encourage you to look at your denial reasons because you will be able to see why it was denied. Please make sure that your contact information is current and that whoever in your organization is responsible for payments know that this as one of their tasks and be ready to respond to such requests. Please make sure we have that updated information on file so that the emails are getting to the right person, and we can get that requested information so that we can process your case through completion.

OK. So those were just a few things we wanted to just cover since it's the first of the year. Sometimes we have changes, and some stuff remains. We just want to put that back in the forefront of your mind and make sure you remember those things. Of course, when you submit payment requests, we want to have all of the information because we want to be able to process that case right through. We don't necessarily want to have to place the case in diary status. We want to go ahead and pay or deny it. We want to go ahead and process it through. So, we just want to give you a few of those reminders.

When we started out the call today, we had our agenda topics, but we would like to invite you to share topics that you would be interested in discussing through this forum. Our goal is to help educate you and provide clarification on processes and procedures related to payments. So again, if you have a payment related topic that you would like for us to discuss in this forum, please send your topics to the EN Payments Helpdesk. You can see here; you can send that to ENpaymentshelpdesk@yourtickettowork.ssa.gov. We would love to hear from you and what topics you would like for us to cover.

And as always, we want to provide the resources that you have available to you. I did mention early about the amazing Helpdesk that we have. So, you do have the resources available Monday through Friday here on the screen. You can see the different phone number and different options. You can also email payment issues and you have the email address there. If you have questions and issues related to Ticket assignment, the Service Provider website, or the Ticket Portal, you can also contact the Helpdesk there. Please remember again, when sending in your emails to the Helpdesk, you are not sending any PII. You are making sure that you use your SSA reference number, or your Work case number and we will be able to look that information up using that number. Or you can also pick up and call. But when emailing please do not send any PII.

And with that, I'm going to hand it back over to Katherine so that we can open up for questions and answers. Katherine.

Katherine Jett: Yes.

Thank you, Kim, for those very informative updates. We will now transition to the open Q&A period.

As a reminder, to ask a question over the phone, please raise your hand on Teams by dialing Star 5, and when you're called on, you will be unmuted by the facilitator and then press star 6 to unmute yourself.

For participants joining on the Teams application, there's an icon at the very top of the screen middle of the screen. You can just raise your hand and you're going to identify yourself by name and please limit your questions to one per raise hand.

At this time, we will ask our facilitator, Keitra, to help us identify our first participant with their hand raised.

Keitra.

Keitra Hill: At this time, I am not seeing any hands raised.

Katherine Jett: OK.

We will go to Jennelle for questions from the chat.

Jennelle Bratcher: Hello, Katherine. So, we do have a few questions in chat.

One question is from Wendy Zorman.

When do Ticketholders get their status updated to the proper payment Milestone on the SSA website? Many of my clients seem incorrect.

And Wendy, if you would like to clarify or the question is not clear, then you can raise your hand to speak as well.

Kimberly Cutler: Thanks, Janelle, and I am not sure when it gets updated. I know in the Portal they can check for payments made to me, so I am not sure if that's the question. So, thank you for asking Wendy to kind of raise your hand so we can make sure. But if she's talking about when you're looking at payments and you want to know what phase or where you are, if you look at payments already made to your EN, I think there she will be able to see what has been paid and then using the Payments at a Glance she would know what to request next. If that wasn't clear, Wendy, if that's not what you're looking for, please, as Jennelle said, please raise your hand so that we can make sure to get your question answered.

Thanks, Jennelle.

You said you had a couple of questions?

Jennelle Bratcher: Yes, I do. Thank you. So, the next question comes from Sandra Alfaro, and I apologize if I'm saying your name incorrectly, but Sandra's question.

Are there payment guidelines for ENs with two business models (traditional EN and employer EN)? Occasionally we assign people to the traditional EN. If Goodwill employs the person, then we are required to transfer to the employer EN. However, sometimes we have issues with the payment request due to the assignment date.

Kimberly Cutler: That's a very good question! When we start talking about business models, I would encourage the EN to reach out to EN Operations and talk about the different business models because that's kind of on the back end. Of course, when it comes to payments, when we get a request for payment, we're looking at who the Ticket is assigned to at the time and then we will process the case accordingly. But if it's something on the back end, how they're working it out, then I would just say reach out to EN Operations team to talk about the different models that they have and work out how and who would submit for payment. When it comes to us and requesting payments, we just again look at who's requesting the payment and look to see who the Ticket is assigned to and move forward. So, I would suggest that they at least reach out to EN Operations for some type of clarification on that.

Jennelle Bratcher: Thank you, Kim. So, we do have another question from Kim Gonzalez.

Are there any exceptions for Workforce ENs not to have to submit a PoR (stubs or the form for P1M1 through P1M3)?

Kimberly Cutler: So, for Workforce Investment Board, right, you know.

Jennelle Bratcher: For a Workforce EN; that is what she said.

Kimberly Cutler: Right. So, for Workforce ENs we pick up payments for you guys on the ePay file because your agencies are trusted partners, we do process all available payments. You should see those come through when we start processing the ePay file. So yeah, Workforce ENs do not have to request through the Portal. We pick up all payment types through the ePay file.

Katherine Jett: Thank you, Jennelle.

Kimberly Cutler: Because they are trusted partners.

Katherine Jett: Thank you, Kim.

Kimberly Cutler: All right. Thanks, Jennelle.

Katherine Jett: We have a few questions Kim, with their hands raised. Keitra, can you identify?

Keitra Hill: Yes. Our firsthand is raised with Casey.

Casey, you can go ahead and unmute yourself, and you actually have the ability to open your camera as well if you like, but you can go ahead and ask your question, please.

Casey Rehg: Hi ladies. My question was kind of on the first slide there with the statistic of code 2 being the most common denial reason. Is there a specific plan in place for SSA to update the Portal in a more timely manner. That is what we're seeing most of the time. Is the Portal showing that yes, or no, they are not in pay status, and we're still being denied months and months later?

We do SSA conference calls to try to get their pay status corrected. We do a lot of things like sending their 821s. But there does seem to be a little bit of a disconnect on the code 2 being denied for several months in a row when they're showing not in pay status.

Kimberly Cutler: All right, thanks, Casey. And I am not sure I think, Katie, we have someone from SSA on the line, but I do know that the Portal is real time. It's based on information as it's entered and there's Katie. So, I'll pass it over to someone that can give you a complete answer.

Katie Striebinger: That’s it Kim. Keep going. You have the answer.

So, the Portal is real time. It is capturing what our staff uses to process payments also right in real time. We look at SSA systems. I am not sure what you are looking at to determine if something's in current pay or not in current pay before you submit the payment request.

Casey Rehg: The Portal. SSA Portal.

Katie Striebinger: So, are you talking about the boxes?

Casey Rehg: I am talking about the SSA Portal that shows that they are in current pay status and not in current pay status.

Katie Striebinger: You cannot rely on that box. We actually have been trying to get that box removed because you cannot rely on that box. The ultimate real-time decision is when it comes over here, and we look at it to make your payment request.

When we review your payment, the status at the time we look at it is what we use, no matter what the Portal said at the time.

So even if you were using, you know, you were going to try to submit that as evidence, we cannot use it. We look in our system, the system in real time.

I hope that helped.

Casey Rehg: So, how do we see that? How do we see what you are seeing? Because why would we request a payment if we know it is going to be denied?

Katie Striebinger: You cannot see what we see. We cannot give you that kind of beneficiary PII. It is not something that we share with you in the Portal. The Portal is not supposed to be giving that kind of detailed level of information.

Casey Rehg: OK.

Katie Striebinger: I think we said this a while ago Kim. If your Ticketholders are already in Outcome status, that's where we do encourage you if you have the ability to rely on ePay because we will make all available Outcome payments based on what's in our system. We will pay the Outcome when everything matches up in the system when there are earnings, and the payment status is correct. If you're finding that you go in each month and request the same Outcome and you get the same thing, you know it's still in current pay.

If you wait for ePay, you will see that we will make it as soon as it's available in the next ePay file because we do ePay quarterly.

So yes, if you are just going to submit it without knowing their status, you know there is the chance that you will get that denial.

Casey Rehg: OK.

That leads me to a really quick question. If we request three in a row, then the Tickets are unassigned?

Or that is only for if we're not providing proof of earnings and it's denied three times in a row, that right?

Got it.

Katie Striebinger: That is, in the Phase 1 Milestones. I was talking to the Outcome phase. They already received an Outcome payment, and you are trying to figure out when the next Outcome is available, right? Unassignment is for Phase 1 Milestones 1 through 3 where you need to submit the proof of relationship. Those cases are in current pay. So, we are talking two different payment statuses. Go ahead.

Casey Rehg: Ok, so there is really no way. Yeah, I am sorry about that. There is really no way for us to see in real time if they are in current pay.

Katie Striebinger: No, there is not.

Katherine Jett: Thank you, Casey.

Casey Rehg: Ok. Thank you. Thanks ladies.

Katherine Jett: Thank you.

Striebinger, Katie: I hope I at least made some of your payment points like a little clearer, you know; that you thought you had some information that you did not. I hope that helps a little bit.

Kimberly Cutler: And I think too, Kate, if I could add Casey when you said there is no way of knowing if they're in current pay, I think I'm going to loop that background to proof of relationship, right. If you're in a meeting with your client, talking to your Ticketholder, those are things to ask. If they are receiving a check once a month. That may be a way to just confirm. Just a thought.

Katherine Jett: Thank you, Kim.

Kimberly Cutler: All right. Thanks Katie.

Katherine Jett: Keitra. Do we have anyone else?

Keitra Hill: Yes, we do. We have Barbara Valmont.

Your line is now open for you to go ahead and ask your question. You can unmute yourself.

Barbara, you would now need to unmute yourself to ask your question allowed.

Katherine Jett: Barbara, if you click the microphone up top, it will be up the top.

Click on that to unmute.

Katherine Jett: While we are waiting on Barbara, Keitra.

Keitra Hill: Yes. Next, we have a question from Sandra Abbott.

Sandra, you are now able to ask your question. Please unmute yourself.

Katherine Jett: Hi Sandra — if you will click your microphone up top.

And just unmute you are unmuted.

OK. Well, while Sandra is unmuting, Keitra do we have anyone else with their hands raised?

Keitra Hill: Yes, we do, Casey Hunter.

You are now able to go down and unmute yourself and ask your question.

Very sorry.

Carrie Hunter (Guest): Yeah, it is Carrie.

Keitra Hill: Very Sorry.

Carrie Hunter (Guest): I have been having to submit my payment request manually because I'm a new EN and I haven't accrued 10 Ticketholders and all that stuff, and I've been having issues with one.

Sometimes, I guess my payment requests are not received, so I feel like I've been annoying the heck out of them; asking every time I submit a request whether it was received and then there were times where I get confirmation that it was received. But then I get to that 30-day period where it's still not showing up as pending in the Portal and I call to find out what's going on and they can't find it. Or I'm being told it hasn't been received and I tell them I received confirmation that it was received and then they look into it further and they'll say, ohh yeah, it hasn't been assigned to anyone yet. We'll send it to a manager and get that processed. I just feel like I'm having to stay on top of every single step of that. And I'm wondering if I'm doing something wrong or if that's an issue or just the way that it is on y'all's end. I have just had a lot of issues with that, consistently every payment request.

Kimberly Cutler: Hi.

Carrie Hunter (Guest): Uh, yeah.

Kimberly Cutler: So yeah, I'll go ahead.

Carrie Hunter (Guest): Hi.

No, go ahead.

Correct.

Kimberly Cutler: Oh, oh, sorry. I was hearing the echo. Yes, so that may be an isolated incident. So, you are sending in your payments manually, right? So, you are mailing them or faxing them. Right, Carrie?

Carrie Hunter (Guest): Faxing, yes. I faxed them and then I am having to follow up right after saying was it received. Sometimes they will say no, it was not received so I will resend them. But there's been times where I go almost 30 days waiting for it to hit the Portal and I'm not seeing anything, so I contact them and they'll say no, it wasn't received and then I have to resubmit it and wait another 30 days.

Or I'll get confirmation that yes, it was received, but then it's coming up on that 30-day period where it's still not showing up as even pending in the Portal. And I'll be told it hasn't been received and I'll say, well, I received confirmation that it was received and then they'll have to look into it further and then find it somewhere. I guess that it was received. It just seems like there is some disconnect there and like I said, it's happening enough that it's become an issue to the point where I feel like they're getting annoyed by me contacting them at every step of the way and having to find out what's going on with my payments and why they're not being processed or whatever the case is.

Kimberly Cutler: OK. Jennelle, I see you turned your camera on. You wanted to say something? Go ahead.

Carrie Hunter (Guest): Uh-huh.

Jennelle Bratcher: Yes. So, our Provider Helpdesk Manager did have to step away from the call. So, my apologies. I know she would address this directly with you, Carrie. I am the Ticket Operations Manager. I am going to make sure that I look into this for you. If there are some sort of business process breakdowns, then it's something that I want to look into immediately. But first and foremost, I want to let you know that they are never annoyed to assist you. So, call many times as you need to call to make sure that we can get things remedy for you.

Carrie Hunter (Guest): Thank you.

Jennelle Bratcher: Please do so, but I will make sure after the call that I'll look into this with Sharday Jenkins, who's the manager, and we'll try to work on some sort of mitigation for you because that is definitely a process breakdown. We do make sure that we process all faxes within 24 hours. So that is very concerning for me. But thank you for reaching out.

Carrie Hunter (Guest): Thank you so much. I appreciate it.

Jennelle Bratcher: Absolutely.

Kimberly Cutler: Thanks, Jennelle.

Katherine Jett: Thank you.

Thank you, Carrie.

Keitra, do we have any more raised hands?

Keitra Hill: Yes, we do. We have Mary Lynn ReVoir.

You are now able to unmute yourself and ask your question.

Mary Lynn ReVoir: Good afternoon. This is Mary Lynn with the American Dream Employment network. It is not necessarily a question, but Kim, when the comment was made about the history that you have for whether they are in cash pay status or not, and maybe that would go away. I think there was a quite a few comments in the chat as well.

I just would like for consideration be given to not remove that. I do think most of the time it seems to be correct and it's very helpful from the EN standpoint and for your team you might get a lot more requests that are going to be time consuming for you because of not having that information that we can see. So, I just wanted to voice that concern if you remove that part from the Portal. Thank you.

Kimberly Cutler: Thank you. Thank you, Mary Lynn.

Katherine Jett: Thank you, Mary Lynn.

Keitra, do we have any more hands raised?

Keitra Hill: Yes, we do. We have Sonya Harrison.

You can now unmute yourself and ask your question.

Sonya Harrison (Guest): Thank you so much. Thanks, you, guys. My name is Sonya Harrison with Maryland New Directions. My question is, if you are denied when you are putting your pay stubs into the Portal and it says it is due to the Milestones, does that mean I need to reenter the payments?

For our previous Milestone, am I going too far ahead of myself for the Milestones and that's why I'm being denied payment?

Kimberly Cutler: I think I would have to know exactly what the denial reason is. So, if you are requesting a Phase 1 Milestone 2 is the denial for that is that payments must be made in order? Is that what you are getting?

Sonya Harrison (Guest): Yes.

Right.

Kimberly Cutler: Right. So yes. We have to make the payments in order. So, if you are requesting a Phase 1 Milestone 2 and Phase 1 Milestone 1 has not been addressed yet, which means it's not excluded due to VR involvement or prior earnings, then yes, you have to request your Phase 1 Milestone 1. Earlier we talked about the 18-Month Look Back tool. So, if you request for Phase 1 Milestone 1, we are going to do a look back. So, if you can get Phase 1 Milestone 1, we will process it accordingly. But if you are not eligible for that or any of the Milestones, we will deny them. If your first payment request is for a Phase 1 Milestone 2 and we have not addressed that Phase 1 Milestone 1, then yes, your case will be denied. So, you want to make sure you go in order.

The Payments at a Glance is a great resource to show you the order that you would go in right; your Phase 1 Milestone 1, Phase 1 Milestones 2, Phase 1 Milestones 3 and 4. That order will only change up if there is an exclusion. So that denial is because you are requesting for a payment prior to the first payment being addressed.

Sonya Harrison (Guest): Will I have to resubmit the payments?

Kimberly Cutler: Yes, if you are asking for and I am just using this example. If you are asking for Phase 1 Milestone 2 and you have not requested Phase 1 Milestones 1 yes, you're going to need to request the first payment.

Sonya Harrison (Guest): OK.

Thank you.

Kimberly Cutler: You're welcome.

Katherine Jett: Thank you, Sonya.

Keitra, do we have our next participant with the question?

Keitra Hill: Yes, we have Sandra Abbott.

You are now able to unmute yourself and ask your question.

Sandra again, you have been promoted to be able to unmute yourself and go ahead, ask your question aloud.

Sandra Abbott (Guest): Ohh.

Katherine Jett: We can hear you.

Sandra, you are unmuted.

OK, Keitra do we have anyone else with their hands raised?

Keitra Hill: We do not have any other raised hands at this time.

Katherine Jett: Well, on behalf of SSA and the Ticket Program Manager, I would like to thank our presenters and everyone attending today for this informative and interactive session.

The Recap, PowerPoint presentation and audio from today's call will be available very soon on our Ticket to Work website. Now looking ahead, we will have the next call

Keitra Hill: Hey, Katherine.

Katherine Jett: Our next, All EN Payments Call is April 25, 2023, from 1:00 to 2:00 p.m. Eastern Time. Thank you again for attending and have a good rest of your day.

Keitra Hill: We actually had two people that just raised their hand. I know we have about 5 minutes. Do we have time to take those two?

Katherine Jett: Yes, we do.

Keitra Hill: OK.

All right. The first question or hand raise is from Linda Benedict.

You are now able to unmute yourself and ask your question.

Linda Benedict: You can hear me.

Keitra Hill: Yes.

Katherine Jett: Yes.

Linda Benedict: All right. Thank you very much. We are new. We are a Workforce Board and we just recently got permission to get our payments via ePay. We have a lot, and we were trying to use the Portal. There is a lot of denials for various reasons like out of order or did not have the PoR form. Do I need to go back and correct all those now?

Kimberly Cutler: No. If you are eligible for ePay and like I said, we just started the ePay file this week, so any of your missed payments or any payments that are available to you, we should pick those up on this current ePay file.

Linda Benedict: Yeah.

Kimberly Cutler: And you said Linda, I think that was your name. Sorry. You said you guys were just approved to be on ePay? Is that what you said?

Linda Benedict: Yes, we were just approved. I do not know why we've been doing this for three years, but we didn't realize we could be paid. So, we submitted a request and got an email that we would be on ePay last week.

Kimberly Cutler: OK.

Linda Benedict: And they did not know if I had to go back and work through all those errors.

Kimberly Cutler: Oh, not at all. ePay will take his course and like I said, we will make a note in the Portal when we are processing ePay. So, we do ask that you just be patient because you are a Workforce. And so, when we start processing those cases, you will start to see payments. If you have available payments, then we will start making those payments to your EN. And we usually take, I don't really like to say how long, but it could take a couple of months. So just know, if you do not start to see something within the next month, I'll say then please reach out. If you guys are ePay eligible, then we will make all available payments based on the information we have in SSA system.

Linda Benedict: I want to thank you for this.

This is a very informative seminar, so thank you very much. You answered so many of my questions.

Kimberly Cutler: Thank you so much.

Katherine Jett: Thank you, Linda.

Keitra, do we have another individual with a question?

Keitra Hill: Yes, we do, Anthony. You are now able to unmute yourself and ask your question.

Katherine Jett: Anthony, go ahead.

Keitra Hill: Again, Anthony. Yes, if you could go ahead and unmute yourself at this time.

The microphone option is at the top right next to leave.

So again, you can unmute yourself and ask your question.

Katherine Jett: OK. Do we have any other participants with questions, Keitra?

Keitra Hill: We do. We have Heather Miller.

Heather, you can now unmute yourself and ask your question.

Heather Miller: OK, thanks. You can hear me, right?

Kimberly Cutler: Yes.

Katherine Jett: Yes, ma'am.

Heather Miller: OK, this is in regard to when I am submitting some of the Phase 1 payments. If I know that my client is not going to be eligible for some of the payments and I have those previous pay stubs, I will typically attach them to my pay request so that it can be seen that that there are Trial Work Level earnings before Ticket assignment that will exclude some of those.

It is about a 50/50 miss, though, that they get caught. And half the time they will get denied and I have to resubmit it. Is there something special that we can do to call that out so that gets caught the first time around.

Kimberly Cutler: Umm.

Heather Miller: Because I am providing proof that we are not due something.

Kimberly Cutler; Right. Hi Heather. Thanks.

Heather Miller; Yep.

Kimberly Cutler: Yep. So, you and I have talked about it. What happens is and again, I do not want to just narrow it down, but a lot of times what we see is just that where there was a prior assignment, and you're submitting your earnings information and thank you, we appreciate that. What we're doing is we're looking at the entire history of the Ticket and if there was a previous assignment or prior assignment then we use that Ticket assignment date for exclusion of earnings, so that may be what you are seeing.

And that's why we wanted to add that as a reminder, just because I don't think a lot of ENs know that, but that's what it's based on. So, if you assign the Ticket say January and you have December earnings, so you're like oh, let me send this in because I know we can't get Phase 1 Milestone 1 because it was one month prior to assignment. If there was another assignment, then we're going to do an 18-month look back based on that. So, the earnings that you're sending for the month prior would not affect the 18 -months look back earnings.

Heather Miller: Right. We do understand that now and I am glad you brought that up because I did not know that.

After all my years in this program, but for the ones that have no previous assignment, do we just put a big note on there that says hey, please deny Phase 1 Milestone 1 and here are the pay stubs to show you we're not do that.

Kimberly Cutler: You know you can always make a note. We appreciate the note, but yeah, we will make sure that we're doing our due diligence. So, any information that comes in with the payment request, any type of earnings information that comes in, we're going to enter that information. So yes, it's always very helpful that if you have up-to-date information, right, because it may be something that was not reported to the field office just yet. So, they may not have it. So yes, please, when you are requesting a payment, please send in earnings information that you have so that we can enter it into the system. We will use that information, you know from your pay stubs, to populate the 18-Month Look Back tool and that will help determine any Phase 1 Milestones exclusion. So yes, please continue to send that in Heather, if you have that.

Heather Miller: Thanks, Kimberly. Appreciate you.

Kimberly Cutler: You're welcome. Thank you.

Katherine Jett: Thank you, Heather.

Keitra.

Keitra Hill: Yes.

Katherine Jett: Anymore participants with their hands raised?

Keitra Hill: Yes, we do. We have Sandra Abbott. She came back in. So, we are going to try to get her to unmute her mic and Sandra, you can go ahead now, and unmute yourself and ask your question.

Again, you are unmuted now.

Katherine Jett: Mm-hmm.

Sandra Abbott (Guest): My point?

Katherine Jett: We can barely hear you.

Kimberly Cutler: Yeah. I cannot hear anything.

Sandra Abbott (Guest): Do you hear me now?

Katherine Jett: Maybe I will.

Katherine Jett: I cannot either, just a little bit louder.

Keitra Hill: Sandra, do you possibly have on a headset and the MIC is up?

Katherine Jett: OK.

Well, we can go to the next participant.

Keitra Hill: Yes, that's Natalie Harrison.

You now can unmute yourself and ask your question.

Natalie Harrison, CESP: Good afternoon, ladies.

My question is regarding pay stubs. I remember it was stated not to allow or discouraged beneficiaries from bringing actual pay stubs to the field office. Are they able to resume doing that, or no?

Kimberly Cutler: Hi Natalie. I did not see anything mentioning that they could resume. But I will ask. I do not know if Katie, if you are still on. Have you received any updated information to the previous instructions about sending paystubs to the field office?

Katie Striebinger: No, I am not aware of any updated guidance.

Natalie Harrison, CESP: So still discourage?

Katie Striebinger: The message that we sent was about Employment Networks submitting paystubs to the field office. So that stands.

Natalie Harrison, CESP: OK. So, can you just clarify that just kind of repeat that statement so that I can fully understand because what I've been doing is beneficiaries are saying they want to submit paper stubs to the field office and from my understanding of the email that came out, it's kind of inundating the team and they're not able to keep up with the paper. So, I've been telling them to try to set up their myssa.gov accounts and, you know, report them to us. We can submit for them. But what is the actual rule right now?

Katie Striebinger: So. The message was about Employment Networks. We discouraged Employment Networks from submitting pay stubs to the field office on behalf of their Ticketholders. We encouraged ENs to reach out to their Ticketholders, and like you are doing, try to encourage them to make my SSA accounts or to use the phone. So, it was a GovDelivery message that went out and we gave you other ways to report that would be more timely.

So, I am trying to think of the message in my head. I don't have it in front of me.

Natalie Harrison, CESP: Yes.

Katie Striebinger: But ENs, by providing pay stubs to SSA through the Ticket to Work Program right when you submit pay stubs as part of your proof of relationship, or just with your payment request to us through that method, through the Ticket to Work Program, then you do not need to and should not be sending those pay stubs to the field offices. Now beneficiaries should, but you should not. ENs should not be reaching out to the field office because the duplication that we were trying to avoid is that you're sending to our program pay stubs as proof of relationship or to assist in a payment because you have earnings that you have in your hands that we don't have in our system yet. By sending that to us, your EN does not need to submit those then to Social Security. We encourage you to get your Ticketholders into a *my* SSA account.

Natalie Harrison, CESP: OK.

Katie Striebinger: Then I get all that Kim?

Kimberly Cutler: Yeah, I actually pulled it up too.

Katie Striebinger; It is the best I could have like my memory.

Like a quiz.

Kimberly Cutler: That was really good. Yes. So, I did pull it up. And that's exactly right, Katie. It is just that we do not want Employment Networks to send or take the beneficiary's pay stubs. And you are exactly right, we want to encourage them to use the different methods for reporting wages, which is a *my* SSA account, which is the mobile wage reporting smartphone app or by calling. So that is exactly right, which is why we encouraged ENs not to submit. It is the responsibilities of the Ticketholder to report that information.

Natalie Harrison, CESP: So, they can still send drop off paper stubs then even though we want to kind of guide them toward the other formats, they can still do paper stubs?

Kimberly Cutler: Yes

Natalie Harrison, CESP: OK.

Katie Striebinger: Yes. And like I said, unless they have some kind of guidance that they've received from their own local field office. Speaking for the Ticket to Work Program as a whole, the guidance that we have is that it is the beneficiary responsibility to report their earnings and ENs, we ask you to help them and support them in doing that if they have something specific. You said you had something about not reporting the pay stubs. I am not aware of anything. Like I said the GovDelivery message was about ENs submitting pay stubs.

Natalie Harrison, CESP: OK.

Kimberly Cutler: Because it does say it was an increase in Ticketholders going in. So, they just did not want ENs sending all of the paper paystubs because they just did not have the capacity. So, you were right, Katie. So that has not changed.

Natalie Harrison, CESP: OK. Thank you.

Kimberly Cutler: All right. So, Katherine, I think we can go ahead and wrap it up.

Katherine Jett: Thank you, Natalie.

Exactly. Thank you, Kim. Thank you, Katie. And looking ahead, we will have the next All EN Payments call April 25th, 2023, from 1:00 p.m. to 2:00 p.m. Eastern Time. Thank you again for attending and have a good rest of your day. This concludes the All EN Payments Call.

Kimberly Cutler: Thanks everybody. Thank you, Katherine.

Katherine Jett: Thank you.