



ALL EN PAYMENTS CALL TRANSCRIPT

MAY 6, 2025

Katherine Jett: Good afternoon, everyone, and welcome to the quarterly All-EN Payments Call. My name is Katherine Jett, and I will be your moderator for today's call. Now, before we get started and name our presenter, we will cover a few logistics and the agenda.

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Now for logistics. Now, this call is being recorded and transcribed, and EN participants are not permitted to record the meeting nor capture the transcript, per the Ticket Program Agreement Part 2, Section 11, Subsection I. All post-call items, including the recap, the transcript, the audio reporting, and the PowerPoint presentation from today's call will be available in a few weeks on the Your Ticket to Work website. If you go to the website, you will click "Training and Events", "Archives", and look under the "National Calls" section, you will see the "All EN Payments" calls by year.

There will be an interactive question and answer session during today's call, and we want to let you know the chat is not active, but during the Q&A; to ask questions, if you join via the MS Teams application, you will need to click the "raise hand" icon at the top of the screen. You will be called upon by the facilitator and will be given access to audio. You will then need to click the mic at the top to unmute. Now if you join via the phone, you will click star 5 to raise your hand, you will be called upon by the facilitator and given audio access. You will need to click Star 6 to unmute yourself.

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We will have the Q&A session today. During the Q&A session, please ask only one question for each raised hand. Please do not give Ticketholder specifics. You will send those questions or additional comments to the ENPaymentshelpdesk@ssa.gov. Closed captions are available today in the MS Teams application. Now, to turn on live captions, click "more" at the top of the screen and select "language and speech", then "turn on live captions". The closed caption link to access the closed captions via the browser was provided in the GovDelivery blast.

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Now for today's agenda, our presenter will cover January ePay file statistics, ePay reminders, Payments Helpdesk reminders, EN Payment reminders, and resources. Then we will transition



to the question-and-answer session and then move on to closing remarks. And I see our presenter. It is now my pleasure to introduce our presenter, the TPM EN Payments Manager, Nicole Black. Take it away, Nicole.

Nicole Black: Thank you, Katherine. Welcome, everyone.

Next slide, please.

To start off the call, we will go over the January ePay file statistics. The last ePay file was completed in March of 2025. For the processing totals, there were 10,470 total claims paid, 3,172 total SSNs paid, with a total amount paid out at \$5,884,727. And SSA has started processing the April ePay file.

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A few ePay reminders for you. Phase 1, Milestone 4, is paid via ePay, but ENs must still submit payment requests for Phase 1, Milestones 1 through 3 through the Ticket Portal with proof of relationship. Unassigned Tickets are not included in ePay, and ENs must have passed their Annual Service and Supports review. The ePay file is processed in SSN order, not in Provider ID or PID order. And 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 without earnings evidence when the EN portion of the ePay file is being processed. Submitting for such payments, slows down processing and causes duplicate claim months.

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Please allow TPM to pay all available claim months via ePay before requesting payment via the Ticket Portal. An initial PII violation will remove the EN from ePay for three months or one full ePay file. During this time, the EN must submit payment requests via the Ticket Portal. For example, if an EN violates the PII rule while a file is currently being processed, then in February, they will be removed from the next ePay file.

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Moving on to the Payment Help Desk Reminders. As a reminder, for payment inquiries, all communication regarding Ticketholders and Employment Networks must be with suitable EN staff. So, that is your approved Portal users, program contacts, and signatory authorities. And for personally identifiable information, PII, if an EN submits or needs to submit PII, that submission must be done via fax or mail. Please do not send PII via email. ENs should use the SSA reference number when emailing payment inquiries to the Payments Help Desk.



Next slide, thank you.

A few more additional reminders regarding the Payments Help Desk. The Payments Help Desk staff cannot provide the following information. That information includes anything regarding a Ticketholder's benefits, inquiries, or disputes, information on earnings in SSA's records, claim months needed to complete the proof of relationship, information regarding the Ticketholder's current entitlement, and claim months for payment. What the Payments Help Desk can help you with is the reason for the denial or an explanation for an outreach email.

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Transitioning on to the EN Payments reminders. For Unassigned Ticketholders, Tickets that are unassigned by the EN per Part 3, Section 5D, 2.A.1 of the Ticket Program Agreement, while an EN may unassign a Ticket at any time, doing so means that this EN is no longer providing services or ongoing employment support to that Ticketholder. Ongoing support or the availability of ongoing support is a requirement for continued payment. When the EN unassigns the Ticket, SSA will cease Ticket payments to the EN effective the month prior to the month of Ticket unassignment. So, if you unassign a Ticket in April, your last payable month would be March. So, it is the month prior to the month of unassignment. The EN will not be eligible for future payments, including split payments for subsequent work and earnings achieved by the Ticketholder beginning with the month of the Ticket unassignment.

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When a Ticket is unassigned by the Ticketholder. This can also be found in Part 3, Section 5D, 2.A.2 of the Ticket Program Agreement. While a Ticketholder may unassign their Ticket at any time, the EN of record at the time of unassignment may still benefit from its contributions to the Ticketholder's work achievements. SSA may continue to pay the EN the full payment due for any of the claim months for which the Ticketholder's earnings qualify the EN. But this shall not exceed a period for more than 12 months in an 18-month period, beginning with the unassignment month. The difference here is if the Ticketholder unassigns the Ticket, you can still continue to request payments post-Ticket unassignment. These payments are subject to SSA's evaluation of the ENs service contribution, unless the Ticketholder reassigns the Ticket prior to the completion of the 12 claim-month period.

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For Tickets that are unassigned, but the Ticketholder reassigns it with another EN. Should the Ticketholder reassign the Ticket to another EN during the 12 claim-month period within the 18



months after unassignment, the former EN or ENs may request split payments for the remaining months of the 12 claim-month period beginning with the month the Ticketholder reassigns that Ticket. In either event, all payment requests shall be accompanied by evidence of work and earnings unless the Ticket Portal indicates, and SSA payment processing confirms, that SSA has evidence of work and earnings on record.

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I want to go over now the requirements for the PoR form. When you are completing the PoR form and submitting it for your Phase 1, Milestones 1 through 3, the EN's name must be on the form along with the PID, the Ticketholder's name, the Ticketholder's SSN, the Ticket assignment date, and that means the current Ticket assignment date. So if you have had this Ticket and you may have unassigned it and reassigned it, please make sure when you are submitting your proof of relationship for your Phase 1, Milestones 1 through 3, that you are using the current Ticket assignment date for this request, the Ticket unassignment date if applicable, and be sure that the Phase 1 Milestone number box is checked on the form.

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In addition to what was on the previous slide, the date and description of the services provided to the Ticketholder must also be present.

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And then finally, at the bottom of the form, please be sure that the EN representative's name, signature, and date are all present.

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Proof of relationship requirements for Phase 1 Milestones 1 through 3 when earnings are verified in the system. When submitting Phase 1 Milestones 1 through 3 payment requests, ENs must submit pay stubs or a completed proof of relationship form with detailed services provided to the Ticketholder for the requested milestone period. The Portal uses a formula to determine potential payment eligibility, but this does not guarantee payment. Payment requests are reviewed and adjudicated based upon real-time earning data that is reported in SSA's database.

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The Employer-Prepared Earnings Statement and Supplemental Earnings Statement. Over the next few slides, we are going to go over the information that is required to have these forms submitted and to be considered valid documentation. We will start with the Supplemental Earnings Statement, which is SSA Form 1373. First and foremost, we need the EN name and PID, listed up top. We need the Ticketholder or the employee's name and their SSN. We need the pay period beginning and ending dates, the date that the Ticketholder was paid, the amount of hours worked, their hourly pay rate if applicable, the withholdings amount, and then the total gross along with the year-to-date gross earnings. At the bottom portion, you will notice that we require the employer representative name, their signature and date, and it is very important to make sure that the attestation box is checked at the very bottom. That box reads, "By checking this box and signing above, the employer attests that all withholdings required by law have been made for this employee's earnings." Therefore, it is very important to make sure the box is checked prior to submitting this documentation.

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For the Employer-Prepared Earnings Statement. For this document we need to be sure that the Ticketholder or the employee's name and SSN is listed at the very top. Again, we need the pay period beginning and ending dates, the paid date, the hours worked, the hourly rate, the withholding amount, the total gross, and the year to date. On the bottom portion, you will see that we need the employer representative's name again, their title, the employer's name and address. Again, there's another attestation box that needs to be checked, and then we need the signature and date of that employer representative.

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On to our resources. So, if you have any questions, please reach us by phone Monday through Friday, 9 a.m. to 5 p.m. Eastern, toll-free at 866-949-3687, or TTY at 866-833-2967. Option 1 will get you to the Beneficiary Help Desk. Option 2 will get you to the EN Payments Help Desk. And Option 3 is the Systems Help Desk. When you receive GovDelivery messages, please save this email address to your safe senders list so that messages do not go into your spam or junk email boxes. And then for email inquiries for payment issues, you will reach out to ENPaymentshelpdesk@ssa.gov. For questions and issues related to Ticket assignment, the service provider website and the Ticket Portal, it is ENSystemshelp@ssa.gov. Please note that the email addresses listed here have been updated. Please make sure that you get the most recent email addresses so that you can maintain communication with us.

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And if you have any payment topics, we would like to invite you to share those 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. Please send your topics to the EN Payment Help Desk at ENPayments@ssa.gov. Again, please make note of the updated email address here.

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All right. We are transitioning to our question-and-answer session. So, please remember, if you are asking a question by phone, raise your hand by pressing star 5, and you will be unmuted by the facilitator. Then you will press star 6 to unmute yourself. If you are asking a question from Microsoft Teams, raise your hand and you will be unmuted by the facilitator. You will need to click the microphone to unmute yourself. All right, Jalin, let's start with our first question.

Jalin: Yes, we have Lori. You are now able to activate your audio and ask your question.

Lori: Hi, good morning, or it is my good morning, your good afternoon.

Nicole Black: Hi, Lori.

Lori: Hi. I just want to clarify on these Phase 1s. I always send in the pay stubs with the cover sheet. Then I have proof of relationship and all the case notes, and I have a cover sheet on that and occasionally I will have some kind of supplemental with the correct cover sheet on that. When I go into the Portal and I have this package of information, if it pops up that these claim months are already in the system, can I just ditch the proof of relationship and just submit the pay stubs? I'm just trying to get enough so I don't have 50 pages that I'm faxing, which is often what happens to me. So, will you help clarify this? This always gets so confusing to me.

Nicole Black: Absolutely, thank you for your question, Lori. So just to repeat your question back, when you have pay stubs for your Phase 1, Milestones 1 through 3, you want clarification on exactly what documentation needs to be sent in to us when it shows that earnings are verified in the system.

Lori: Correct.

Nicole Black: Okay. Great question. So, there's two ways that you can handle that. Keep in mind that for your Phase 1 Milestones 1 through 3, they must be accompanied by proof of relationship. And what that means is they can be accompanied by a pay stub. And if you don't have pay stubs that coincide with the claim month that you are asking for, then that is when



the Proof of Relationship form or documentation is needed. Pay stubs are the gold standard. If you have those, you can forego the other information and just send in those pay stubs.

Lori: Thank you.

Nicole Black: You are welcome. Did that clarify it enough?

Lori: Yes, it did. Thank you.

Nicole Black: Perfect. Thanks. Jalin, who do we have for our next question?

Jalin: Yes, we have Casey. Your audio and video are active. Please click the microphone to unmute and ask your question.

Casey: Hi, Nicole and everyone else. Good day to everyone. My question is, and it is a little random, but are there specific timeframes that you guys start the ePay cycle? Do you have dates or is it just kind of here and there? Are there specific times that you know that you are going to start an ePay cycle? And if so, is there a way that we can have that information as well so we can plan ahead?

Nicole Black: Hi Casey. I was just writing down my quarters. Okay, the ePay file is done quarterly and we have a goal as to when it will be done. So, traditionally it is done January, April, July, and October. But those are moving targets so to speak, because it depends on when we get the information that we need and complete the internal processing before we can actually start the file. So, for planning purposes, it is usually at the end of those time periods, at, like, the end of January, end of April, and then July and end of October. But give or take a week or two on the front or back end of that, again, depending on when we receive all the information, we need to actually start processing that file.

Casey: All right, that sounds good. That is kind of what I was figuring; it wasn't a set date or anything, so I just wanted to make sure. But thank you very much, I appreciate it.

Nicole Black: You are welcome.

Casey: Have a good Mother's Day.

Casey: Thank you, you as well. Jalin, who do we have next?

Jalin: Yes, we have Kim next. And I apologize. We went a little out of order, but your video and audio are active. So please click the microphone to unmute and ask your question.



Kim: Hello. I listened to you explain what happens in the event one of our clients wishes to unassign her Ticket. And I'm in that situation now. So, I know I had her sign the Unassignment Form and then I have the Certification of Services. Where do I send that? And do I now go into the Portal and unassign her or do I just send this documentation to you guys and you guys will remove her?

Nicole Black: Hi Kim. Let me clarify your question or make sure I understand it properly. So, the Ticketholder wants to unassign their Ticket, and they've already completed the Unassignment Request Form, correct?

Kim: Yes.

Nicole Black: Okay. So, you just want to fax that in to; I need someone to help me with this, on where they send that in to. But you don't want to go into the Portal and unassign it. Go ahead and submit the documentation and then let the process be completed for it to be unassigned by the actual Ticketholder. If you go in and unassign it, that is a different process step for any additional or future payments.

Kim: Okay. So, I have the form in front of me. Like I said, this is going on right now. The number on the form says 703-893-4020. Does that sound about right?

Nicole Black: I do not know off the top of my head. Can someone confirm that and then we can get back to Kim to let her know if that is the correct number to fax it into?

Kimberly Cutler: It is correct. This is Kim.

Nicole Black: Okay. Thank you, Kim.

Kim: And then where do I send the Certification of Services? Because she's been working and, you know, we've worked with her since, like, 2021. So, if there's any payments left, I'd like to get those.

Nicole Black: So, when you submit your next payment request, you can send them that information with the next payment request.

Kim: What if we're on ePay?

Nicole Black: Wait until after we finish processing ePay, and then once ePay is finished, if you see that there's some claim months that were not addressed at that time, and then you want to



go ahead and submit your payment request through the Portal for this Ticketholder or via manual payment request, depending on the timeline of everything. The manual payment request, you would have the Certification of Services accompanied with that.

Kim: All right. You said wait until after ePay is done, then use pay stubs through the Portal using the manual. What did you say after that?

Nicole Black: The manual payment request. So, depending on your ability to request the payment in the Portal, depending on the timing of everything when you submit your next payment request, if you have to use the manual payment request form, you will submit your Certification of Services at that time with that payment request.

Kim: Okay. Is the manual payment request, I've never seen it. I probably should look at it.

Nicole Black: Tell me which EN you are with, and we will have someone from the Help Desk reach out to you to give you the clear instructions on what you need to do when submitting the manual payment request and where to find the information.

Kim: Okay, do you want my Dun's number or my name?

Nicole Black: The name.

Kim: Okay, it is Suncoast Workforce, but we go by CareerSource Suncoast.

Nicole Black: Career Source. Career, I cannot write, Career Source Sun Coast. Yes. And are you the payments contact?

Kim: Yes.

Nicole Black: Okay. All right. We will get someone to get that information over to you so that you will be ready to go.

Kim: Thank you very much.

Nicole Black: All right. I got all my notes. Thank you. Jalin, who do we have next?

Jalin: Yes, we have Kevin. Your audio and video are active. Please click the microphone to unmute and ask your question.



Kevin: Hi, everybody. I have a self-employed independent contractor in our program who filed her taxes for 2024. And it looks like in the Portal that they have been verified. It shows that she's used nine trial work months, but we don't have any of the pay stubs or typical W-2 earnings information that we would typically bill. Can you tell me the process for billing for an independent contractor in that situation, please?

Nicole Black: Hi Kevin. Thank you for your question. So, you have a self-employed Ticketholder, but the Portal is letting you know that there are earnings available in the system for you to go ahead and request the payment?

Kevin: Correct.

Nicole Black: All right. What you will need to do is submit your payment request in the Portal, and if it is for Phase 1 Milestone 1 through 3, that payment request needs to be accompanied by proof of relationship.

Kevin: Okay. So, the PoR in lieu of any kind of pay stubs that we would typically have.

Nicole Black: Correct.

Kevin: Okay, terrific. Thank you very much.

Nicole Black: You are welcome. Jalin, who do we have next?

Jalin: Next we have Megan. Your audio and video are active. Please click the microphone to unmute and ask your question.

Megan: Hello. How are you?

Nicole Black: I'm well. How are you, Megan?

Megan: I'm good. So, I always get confused with this, and I haven't really been able to find any guidance on it. We were receiving an Outcome payment for a client that is on SSI, but then since then they've gotten SSDI. So, they're actively getting a check in SSDI, but they're in non-pay status for SSI. Would we be able to resume our payments?

Nicole Black: You will only be able to resume payments when they are in suspense due to work or earnings to maintain your Outcome payments. But while they're working or receiving any type of federal cash benefits, you cannot request any additional payments.



Megan: Okay. I didn't know if it was for just, like, one, or it has to be both?

Nicole Black: Yeah, they do need to be in suspense and not receiving any more federal cash benefits.

Megan: Okay. Thank you.

Nicole Black: You are welcome. Jalin, and who do we have next?

Jalin: Next, we have James. Your audio and video are active. Please click the microphone to unmute and ask your question.

Nicole Black: Hi James. I think you were off mute, and I think you went back on.

James: Oh, is that better?

Nicole Black: There you go.

James: All right. Sorry. Thank you for taking my question. We have a Ticketholder who we have an Employer-Prepared Earnings Statement for who is salaried instead of being paid hourly? So, the employer left the hours worked and the hourly rate sections blank. Is that an issue?

Nicole Black: No, it will not, as long as we have the gross earnings and the year-to-date on there and the withholdings amount.

James: Okay. Thank you so much.

Nicole Black: You are welcome. And Jalin, who do we have next?

Jalin: Next we have Holly. Your audio and video are active. Please click the microphone to unmute and ask your question.

Holly: Hi.

Nicole Black: Hi.

Holly: I have a question similar to Kim's. So, we have a Ticketholder who filled out the paperwork to unassign their Ticket, sent it all in, but that was back in, like, October, November. So how long should that process take? Because they're still showing up on our Portal, but we're



not actually working with the consumer. At what point is that a concern or should we refax in the paperwork? I'm just curious what the timeline should be.

Nicole Black: I would refax the paperwork and follow up with a phone call if it is not addressed within a few business days after you send in the fax and get fax confirmation.

Holly: Perfect. I just took over the payment so I wanted to see what the timeline should be. Thank you.

Nicole Black: You are welcome. And thank you. Jalin, who do we have next?

Jalin: Next we have Jill. Your audio and video are active. Please click the microphone to unmute and ask your question.

Nicole Black: Hi Jill, I think you need to unmute.

Jill: I got it, I got it. It was being temperamental. Thank you for taking my call. Good afternoon, everyone. I have a two-fold question and I'm sorry because I know you already presented this, and I got interrupted. If I have the pay stub, do I still need to do that earnings statement, or is it in lieu of a pay stub I would have to do the earnings statement? This is question number one. And then where they want the employer contact, I wanted to know if employers are in fact being contacted by Social Security because I have several customers who didn't disclose, whose employers don't know they have a disability. I was concerned about the contact there.

Nicole Black: Okay, so we will start with the first part of your question, which is what needs to be sent in to accompany a pay stub or in lieu of a pay stub? So, the pay stub is the gold standard. If you have a pay stub, I always recommend sending those in for your Phase 1 Milestones 1 through 3. Those can serve as your evidence of earnings as well as your proof of relationship. Should you not have your pay stubs to support the evidence of earnings or to provide as your proof of relationship, that is when an Employer-Prepared Earnings Statement would be necessary if the earnings are not already proven in the system.

Jill: Perfect.

Nicole Black: All right. So now your second question. Can you restate that one for me?

Jill: Yes. So, there was the employer contact on that form, and I wanted to know what does that mean? Like, is Social Security going to contact the employer for proof of employment? Just concerned for disclosure purposes.



Nicole Black: So, for the Employer-Prepared Earnings Statement or the supplemental earnings statement, we do not use that information for TPM to facilitate any payment requests. We don't reach out to the employer. But the employer does need to sign that documentation for it to be valid.

Jill: Yeah. And so how was the employer notified?

Nicole Black: That would be something that you would work with that Ticketholder and the Ticketholder would need to get that information completed by their employer.

Jill: Okay. Thank you for that.

Nicole Black: You are welcome.

Jill: Appreciate it.

Nicole Black: All right. Jalin, who do we have next?

Jalin: Next, we have Irma. Your audio and video are active. Please click the microphone to unmute and ask your question.

Irma: Hi Nicole. How are you all doing?

Nicole Black: I'm well. How are you, Irma?

Irma: Pretty good. So, my question is regarding an SSI beneficiary. So, he is earning over SGA, but of course now that we're on Outcome, I have to wait until that amount is over to bring his SSI down to zero. So, do I request payment for the month that his earnings are over that threshold or the month that his SSI is zero?

Nicole Black: So, you can request the payment. It needs to be done within a 24-month period. You think about, we have the 24-month age claim rule. So, you have to keep that in mind if you are coming up on an extended period of time, if they're still receiving federal cash benefits and it is a benefit error, like, if they haven't been updated. But if everything is supposed to be and the Ticketholder is still receiving some type of federal cash benefit, you just need to wait until they are in suspense due to work or earnings before you can resume Outcome payment requests.

Irma: So, for example, for January, let's say January he is earning over that amount, but it doesn't affect his SSI check until March. So, in March do I request January?



Nicole Black: No, in March, you would request it. We can't pay until the Ticketholder is not receiving federal cash benefits. So, if in March your Ticketholder is no longer receiving any federal cash benefits, then your claim month would be March.

Irma: Okay. Thank you.

Nicole Black: Did that help?

Irma: Yes. Thank you.

Nicole Black: I confused myself when I was talking to you.

Irma: Thanks.

Nicole Black: You are welcome. All right, Jalin, who do we have next?

Jalin: Next we have Casey. Your audio and video are active. Please click the microphone to unmute and ask your question.

Casey: Sorry, just one more question, Nicole. I'm back in a few slides ago. I just wanted some clarification. If a bene unassigns with us, let's say January 1st and they continue to work, we can still continue to bill on them for the next 12 months, is that what I'm understanding? If they're not assigned with another EN?

Nicole Black: Somewhat. So, if the Ticketholder unassigns the Ticket, you can request an additional 12 claim months for an 18-month period post-Ticket unassignment as long as it is not assigned to another EN. If it is assigned to another EN, then we have a possible split payment situation, and then we would have to review the SSN to determine if the split payment is valid and then take care of the payments that way with both ENs in question.

Casey: Okay, that makes sense. So, if they unassign themselves, let's say in January, and they're continuing to work, right, because we got them back to work and they're continuing over SGA, then we can continue to bill for February, March, April, May, June until next January or December.

Nicole Black: Yes. So, what you are going to do when this happens is you do need to submit your evidence of earnings unless they are present in the Portal, but you will also have to submit your Certification of Services to validate the ongoing payments. So, that is something that you will need to send in with your payment request so that we can determine exactly how many



payments you would be eligible for. We do have to determine eligibility. It is up to 12 additional claim months.

Casey: Got you. Makes perfect sense. Thank you so much for clarifying. I appreciate it.

Nicole Black: You are welcome. Thanks, Casey. All right, Jalin, who do we have next?

Jalin: We have Octavia. Your audio and video are active. Please click the microphone to unmute and ask your question.

Octavia: Thank you.

Nicole Black: Hi, Octavia. Octavia, we cannot hear you. We still can't hear you. Octavia, we're going to move on to the next question, and then we will try to come back to you to see if we can get the audio taken care of. Jalin, who do we have next?

Jalin: We have Myra. Your audio and video are active. Please click the microphone to unmute and ask your question.

Nicole Black: Hi, Myra, how are you? And you are muted.

Myra: Thanks so much. My question was, unfortunately, I was on a call, so I did miss a little bit of the beginning of the slideshow, so I was wondering if it could be emailed.

Nicole Black: The slideshow will be available on the website in a few weeks, and when it is available, a GovDelivery will go out to let you all know so that you can access it then.

Myra: Okay. All right. Thank you so much. That was my question.

Nicole Black: All right, Jalin, let's move on to the next question.

Jalin: We have Mrs. Rosalene. Your audio and video are active. Please click the microphone to unmute and ask your question.

Mrs. Rosalene: Hi. I was informed that the client or the Ticketholder has to submit the paperwork. Is it still having the same process, or only, like, the proof of income and stuff like that, the pay stub.

Nicole Black: Are you asking do they need to report their own earnings or are you specifically for payment requests? Okay, so it is the responsibility of the Ticketholder to be part of the



Ticket to Work Program to report their earnings monthly to SSA. However, as an Employment Network, it is often beneficial for you all to gather their earnings information and submit that with your payment request to provide us with the evidence of earnings to go ahead and ensure that you are able to receive your payments in a timely fashion. Because as you will recall for your Phase 1 Milestones 1 through 3, those must be submitted through the Ticket Portal accompanied with evidence of earnings and proof of relationship for EN to be eligible for those.

Mrs. Rosalene: Thank you.

Nicole Black: You are welcome. All right, Jalin, who do we have next?

Jalin: We have Octavia again, if you would like to try unmuting.

Octavia: Yes. Hello.

Nicole Black: Yay. Hi.

Octavia: Yes. Good afternoon, you guys. Okay, so I have a question about a Ticketholder. I just assigned a Ticket in March. So, I was wanting to see what is the timeframe where we could request payments for that Ticketholder?

Nicole Black: Okay, thank you for your question, Octavia. Your first available claim month would be April of 2025. So, it is the month following the Ticket assignment date that you are eligible to request your first payment, provided that you have the evidence of earnings and proof of relationship necessary.

Octavia: And then I try to send in the information for the Ticketholder, but it keeps sending, like, a block thing where I cannot, it is saying that I cannot send it. So, I'm not sure what to do when that happens.

Nicole Black: Are you meaning from a fax perspective?

Octavia: No, when I go into the actual Portal and I try to put in the information of the Ticketholder's, like, the SGA and all of that, the earned income, it won't let me do it. So that is why I was kind of confused about what I need to do with that.

Nicole Black: Have you reached out to the Payments Help Desk for support on submitting this payment request?

Octavia: No, but I'm going to call them today. Yes, I am.



Nicole Black: Okay, they should be able to give you some guidance on getting that in.

Octavia: Okay, thank you.

Nicole Black: You are welcome. Jalin, who do we have next?

Jalin: We have Justin. Your audio and video are active. Please click the microphone to unmute and ask your question.

Justin: Hi, good morning or afternoon, I guess. Going back to questions regarding beneficiaries, you know, submitting their wages. It is their job to submit wages to Social Security, but it is also, like you said, beneficial for them to meet with us and give us their pay stubs. When it comes to us requesting payments from the Ticket Portal, is there any benefit to the participant by us submitting their wages, or do both need to happen? They need to report to Social Security; we need to report their Social Security. Like, is there anything if they don't wage report themselves but we did it for them through the Portal system requesting payment, does that count as their wage reporting at all or no? Both teams have to do it?

Nicole Black: So, here's my answer. I would never encourage anyone not to follow the rules, so it is the Ticketholder's responsibility to report their wages monthly. But if, well, I don't want to say but, for the purpose of you getting the information and submitting it, we do key all the earnings that are provided by the Employment Networks on behalf of the Ticketholders.

Justin: Okay, cool. So, if they got busy, something happened; they didn't make it on time. They did meet with us, you know, gave us their pay stubs, but they couldn't mail it off for whatever reason to Social Security. By us requesting payments for the month, let's say it happened fresh right there, that would technically count as their wage reporting, too?

Nicole Black: I will say we will enter that data in the system on behalf of the EN so their earnings are getting entered. I just don't want to say that, yes, it is okay for the Ticketholders not to do one of their requirements.

Justin: No, no, no. I'm always urging people, biggest rule, wage report, wage report, wage report. It doesn't matter if you are SSI or SSDI. It doesn't matter. Wage report, no matter what. But if something happens, they don't, but for some reason they get their pay stubs to us. Does it count as their wage reporting or does it not?



Nicole Black: I can't speak to that. Whatever you provide to us, we see those and those earnings. We get it in the system, but I can't speak to what they must or must not do or if there is any type of leverage there for them to skip a month.

Justin: That is it. Thank you.

Nicole Black: You are welcome. And Jalin, who do we have next?

Jalin: We have Jay. Your audio and video are active. Please click the microphone to audio and video are active. Please click the microphone to unmute and ask your question.

Jay: Good afternoon and thank you for taking my question.

Nicole Black: Good afternoon.

Jay: My question kind of comes behind the previous one that you just answered and referenced to submitting earnings. I have a few Ticket clients that I've absorbed from taking on this new position and several of them are not meeting SGA, but I've been still submitting those Tickets. If they're not meeting the SGA and based on what you told me, is it necessary for me to submit Tickets, knowing that I will not receive a payment because they haven't met the qualification?

Nicole Black: That is correct. I would not submit a payment request if you do not have the evidence of earnings that is necessary to achieve that Milestone or that Phase 2 or Outcome that you are looking for. So, I'm assuming these are Phase 2 Ticketholders.

Jay: Yes.

Nicole Black: Yes. So, you do need SGA. It doesn't make sense to request that unless you have the adequate earnings level to be able to make and receive the payment.

Jay: Understood. And from the last question, recipients are supposed to be submitting their wages on their own. Where do they submit that to? Do they mail that directly or can they fax it? What would be the easiest way for them to submit their paycheck stub?

Nicole Black: So that is a question I'm not 100% equipped to answer. I know that there's a couple of different ways they can do it. They can submit their information via phone, online, via their *my* SSA or at the field office. Those are the three that came top of mind to me.

Jay: Phone or online?



Nicole Black: Yes.

Jay: And I guess it would just be ssa.com, and there's links to upload paycheck stubs?

Nicole Black: So, the Choose Work website provides information on how the Ticketholders can report their earnings. Is there anyone that can give us a little bit of additional guidance for Jay specifically? Off the top of my head, I just know it is the Choose Work website that can provide that information for you. Jayme.

Jay: I will continue to do some research. Thank you.

Nicole Black: Somebody's able to help. Jayme.

Jayme: Good afternoon. Thanks. I'm just going to get off mute. So, sure, if you go to www.choosework.ssa.gov, we have a whole page on wage reporting that also links to Social Security's main pages about wage reporting. You want to go to our library, which is across the blue banner at the top, and then there are several different items you can choose, and one of those is "wage reporting". And we detail exactly how to do it.

Jay: Okay. Perfect. Thank you.

Nicole Black: Thank you, Jayme. Appreciate that.

Jayme: No problem.

Nicole Black: All right. We have a few minutes left. Who do we have next, Jalin?

Jalin: Janine, your audio and video are active. Please click the microphone to unmute and ask your question.

Janine: Hello. How is everybody doing today? Good to see you, Nicole.

Nicole Black: Hi Janine.

Janine: I have a question. It is going back to the reporting of the earnings. I know that it is not recommended that we actually fax those pay stubs into Social Security for the beneficiaries. That's when they have someone that is just not able to negotiate and navigate through that process of the wage reporting app and all those. I have been known to fax those in for the individual and then tell them that it is their responsibility to follow up and call to make sure that those pay stubs have been received and reported. And I also will send an email or call them and



say, Hey, let's make that call now and be on the phone and advocate so that we can assure that those benefits, those pay stubs are being recorded to the beneficiary's records. Is that something that is just really not recommended? Or, you know, I kind of want to know where my boundaries are as far as helping someone to report those pay stubs.

Nicole Black: Thank you for your insight, Janine. That is not something that I can specifically speak to. Is there anyone who can provide additional guidance to Janine, or would we recommend reaching out? So, I would say maybe reach out to your ENDT liaison to get additional guidance there, Janine, on what it is that can and cannot be done from an EN perspective as it relates to wage reporting.

Janine: Okay, okay. That would probably be a really good idea, but I just know that if I'm not the one that is saying, Okay, I've got your pay stubs, let's get them in there and get it reported to Social Security, that sometimes if they don't follow through, then I'm, my hands are tied as far as being able to get those pay requests. And so, it kind of backs things up sometimes.

Nicole Black: But remember, you can always, if you have your pay stubs, you can still get those and submit those for your payment request.

Janine: Well, the problem is when the nine-month trial work period ends and they are supposed to go into suspension, if those benefits haven't been recorded by Social Security as being in suspension, then I'm still waiting because it gets denied because it is not in suspension status.

Nicole Black: Right. And that is when, you know, as we recommend, as what you are already doing, you are having that proactive conversation, you are on the phone, you are trying to help the Ticketholder get the information into the system so that their benefits can be updated. But that is something that the Ticketholder has to be an active participant in.

Janine: Okay, okay. All right, well, thank you. And then also, if anybody needs handouts that gives instructions on how to set up the my SSA and the apps and everything, you know, I'm willing to share if anybody wants that and they can call me at Ability First Utah.

Nicole Black: Thank you, Janine. We appreciate that.

Janine: All right, thank you.

Nicole Black: All right, we've got time for one more question. Well, I'm sorry, we have time for a couple more. I realize we started a few minutes late. So, who do we have next?



Jalin: We have Sandra. Your audio and video are active. Please click the microphone to unmute and ask your question.

Sandra: Yes, thank you. Good afternoon. Good afternoon, Nicole.

Nicole Black: Good afternoon, Ms. Sandra. How are you?

Sandra: I'm awesome. How are you?

Nicole Black: I'm pretty good.

Sandra: So, my question is, I do understand when a person has been assigned to a VR that you can't bill for any Phase 1, I mean, Milestone 1 payments. But now the person is still working and my question is, I don't know exactly what to bill if that makes sense. I know I can't do any of the milestones.

Nicole Black: So let me see if I'm hearing you correctly, Sandra. Work with me here. You have a Ticketholder who's working but they worked with the VR first and you know that you can't get your Phase 1s due to the Phase 1s exclusions when there's VR involvement, correct?

Sandra: Right.

Nicole Black: Okay, but as an EN you know you need to request your Phase 1s before you can move on to your Phase 2s.

Sandra: Okay, so I still would have to bill even though I know they won't be approved.

Nicole Black: So, just go ahead and request your Phase 1 Milestone 1, and then at that time, the team will go ahead and review everything with that case. And if we are able to confirm or we see the same thing and we recognize that you are exempt from all your Phase 1 Milestones, they will proactively go ahead and address all your Phase 1s for you to get you set up to request your Phase 2 Milestone 1.

Sandra: So, am I understanding correctly, I still would have to bill for Milestone 1, 2, and 3?

Nicole Black: You can just do your Phase 1 Milestone 1 and we will take it from there.

Sandra: Okay. All right. Thank you.



Nicole Black: You are welcome, Sandra. Any other questions? We can take the next question, Jalin.

Jalin: Yes, we have Sandra. You can unmute.

Sandra: Yes, sorry about that. I forgot to ask the second question. The second question is for those who are on SSI. They do not have a trial work period so we would bill if their earnings are over the SGA?

Nicole Black: For any Ticketholder. I'm trying to conceptualize your question. So, for any Ticketholder you have, it doesn't matter if they're at SGA or not. You still have to start with their Phase 1 Milestone 1s, correct? And with that, you are looking for Trial Work Level or above. So, if you have a new Ticketholder that you have assigned, they're making Trial Work Level or above, regardless of if they're SSI or SSDI, you are looking for Trial Work Level earnings to go ahead and initiate that first payment for that Ticketholder.

Sandra: Okay. All right.

Nicole Black: Does that help?

Sandra: Okay. Yes, a lot.

Nicole Black: All right, good. All right. Any other questions before we wrap up today? All right.

Next slide, please.

I will turn it back over to Katherine for closing remarks.

Katherine Jett: Thank you, Nicole. Lots of great questions today from everyone. Great participation. So, on behalf of the Social Security Administration and the Ticket Program Manager, we'd like to thank everyone for joining today's call. As a reminder, if you have any questions or comments, please email the ENPaymentshelpdesk@ssa.gov. Thank you again and have a great day. This concludes today's call.