ALL EN PAYMENTS CALL TRANSCRIPT FEBRUARY 4, 2025

Katherine Jett: Hello, everyone, and welcome to the first of four quarterly All-EN Payments calls scheduled for 2025. My name is Katherine Jett. I will be your moderator for today's call.

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Before we go over the agenda and welcome our presenter for the call, we would like to cover a few helpful logistics or housekeeping items. First off, today's call is scheduled for 60 minutes. It is being recorded and transcribed. As a reminder, per the Ticket Program Agreement, Part 3, Section 11, Subsection (i), EN staff are not permitted to record this meeting nor capture the transcript. The transcript for today's call, along with the audio recording, PowerPoint presentation, and recap will be available in a few weeks on the Your Ticket to Work website. You can locate that under Training and Events. Click on Archives, National Calls, EN Payments Calls, then look for the date, February 4, 2025, Quarterly All EN Payments Call. Everyone who has signed up for the GovDelivery announcements will receive a GovDelivery blast as soon as all items are posted to the website. During today's call we are going to have an interactive Q&A session. All participants with questions will need to ask their question aloud as there is not a chat feature available. So, to ask a question, if you joined via the MS Teams application, you will click the raised hand icon, which is at the top of your screen. You will be given audio access by the facilitator, then you will need to click your microphone at the top of the screen to unmute to ask your question. If you joined via the phone, select *5 to raise your hand, then you will be given audio access by the facilitator and press *6 to unmute and ask your question.

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We have some helpful tips for questions today during the Q&A. We would like you to only ask one question each time you raise your hand, and keep your questions directed to the topics that are presented today. We will attempt to get everyone's questions answered during the Q&A session; however, if we run out of time and do not get to your question, or that your questions are specific in nature, go ahead and email ENPaymentshelpdesk@yourtickettowork.ssa.gov. Also, we have closed captions available for the call today. To view closed captions, using the Microsoft Teams application, look at the top of your screen and look for "More." You will click on the ellipses and select "Language and Speech," then select "Turn on Live Captions." If you are using the closed caption link that was provided in the GovDelivery message, copy the link and then paste that in the browser to view the closed captions. Now on to the agenda.

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All right. Today's agenda topics include Announcements, the 2024 End-of-Year Statistics, the 2025 Trial Work Level, SGA and Blind SGA Amounts, the 2025 Ticket Payment Rates, the October ePay File Statistics, ePay Reminders, Payments Help Desk Reminders, EN Payment Reminders, and Resources. After the topics are covered, we are going to move to the interactive Q&A session. This is where everyone will have an opportunity to ask your questions on the topics presented. After the Q&A session ends, we will probably do that around 10 minutes remaining in the call, we will provide the closing remarks and the next call date. Thank you again to everyone for joining today.

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At this time, it is my pleasure to hand off to the Ticket Program Manager's EN Payments Manager, Nicole Black. Welcome, Nicole.

Nicole Black: Thank you, Katherine. Hello, everyone. Happy New Year. I know it is February. Happy New Year. Thank you for all joining us. I will start off today with our announcements. The 2025 payment resources are now available and please note that the 2025 Payments at a Glance, the 18-Month Look Back Tool, and the Monthly Earnings Estimator are available for download in the Resource Documents section of the Your Ticket to Work website. If you have any questions about your specific payment method, please contact the EN Service team at ENService@ssa.gov.

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In 2024, for the End of Year Stats, a total of $131,313,968 was paid out. That is a total amount of 183,662 payments made to you all, 61,820 denials. Our most common denial reason was Denial Code 2.

The 2025 Trial Work Level SGA amounts are as follows: the Trial Work Level amount for this year is $1,160; the SGA amount is $1,620; and the Blind SGA amount is $2,700. The 2025 Ticket Payment Rates are as follows. For Milestone Outcome Payment methods SSI Payments, for Phase 1 Milestones, the payment amount will be $1,850. For your Phase 2 Milestones, it is $310. And it is also $310 for your Outcome Payments. For your SSDI Ticketholders, those payments for Phase 1 Milestones are $1,850. For your Phase 2 Milestones and for your Outcomes, they are each $555. For the Employment Networks that are on the Outcome only method of payments, for your SSI Ticketholders, the total dollar amount is $577. And then for your SSDI Ticketholders, it is $1,033. For the October ePay file Stats, the last ePay file for October was completed in December of 2024. For that ePay file, we processed a total of 10,494 claims. That is 3,132 SSNs that were paid, for a total amount of $5,959,617. And SSA has started processing the January 2025 ePay file.

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Thank you. These are our ePay Reminders. Phase 1, Milestone 4 is paid via ePay, but ENs must still submit payment requests for all Phase 1 Milestones 1 through 3 through the Ticket Portal accompanied with Proof of Relationship. Unassigned Tickets are not included in ePay. ENs must have also passed their Annual Services and Supports Review. The ePay file is processed in SSN order, not Provider ID or PID order. Phase 1, Milestone 4, Phase 2 Milestones, and Outcomes are paid via ePay. ENs are encouraged not to submit for these payment types via the Portal without evidence of earnings when the EN portion of the ePay file is processed. Submitting for such payments will slow down the processing and cause duplicate claim months.

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For additional ePay reminders, please allow TPM to pay all available claims via ePay before requesting a payment through the Ticket Portal. Additionally, an initial PII violation will remove the EN from ePay for three months or one ePay file. During this time, the EN must submit payment requests via the Ticket Portal. For example, if your Employment Network violates the PII rule while a file is currently being processed in February, they will be removed from the next ePay file.

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On to the Payments Helpdesk Reminders. Please remember that for payment inquiries, all communication regarding Ticketholders and Employment Networks must be with suitable EN staff. That would include the approved Portal Users, Program Contacts, Payment Contact, Signatory Authority. For Personally Identifiable Information or PII, if an EN needs to submit PII, this submission must be done via fax or mail. ENs must not send any PII via email. ENs should also use the SSA reference number when emailing payment inquiries to the Payments Helpdesk.

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Thank you. The Helpdesk staff cannot provide the following information. That information includes anything regarding a Ticketholder's benefits inquiries or disputes, information on the earnings that are shown in SSA's records, claim months needed to complete the Proof of Relationship, information regarding the Ticketholder's current entitlement, or the claim months for the payment. But what they can help you with is giving you additional information regarding the reason for your denial, and they can provide you with an explanation for an Outreach email.

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Transitioning to EN Payment Reminders. ENs can view denial comments in the Portal. When you are in your Portal, you can click on the "List Payments Already Made to Me" link from the main menu. And then from there you can select the word "Deny" that is highlighted in the screenshot below, which is under the payment decision column for the reference number that is in question.

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When you click on that hyperlink, a dialogue box will open for you to view the denial reason comment that elaborates on the specific denial code for that Ticketholder or that payment request. In this example, the action for the denial reason shows that the beneficiary is receiving Federal cash benefits. And then the comment that is included is "the Ticketholder is in current pay status. Outcome payments cannot be processed when the Ticketholder is receiving Federal cash benefits."

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An additional reminder is the information that is required on pay stubs for us to use them as your evidence of earnings and to be able to key the earnings provided. All pay stubs must include the Ticketholder name, the employer's name, the pay period start and end dates, the date that the check was paid. The pay stub should include FICA withholdings that include your Social Security and your Medicare taxes, and then it should also include gross and net earnings.

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Our resources that are available to you. You can reach us by phone Monday through Friday, 9:00 a.m. to 5:00 p.m. Eastern, toll free, at 866-949-3687, or TTY at 866-833-2967. Option 1 is for the Beneficiary Helpdesk. Option 2 will get you to the EN Payments Helpdesk. And option 3 will send you to the Systems Helpdesk.

GovDelivery messages. Please save the email address that is listed below to your safe senders list so that these messages do not go into your spam or junk email boxes. This is how we communicate any important updates or information that is needed for the Ticket to Work

Program. That email address is tickettowork@subscriptions.ssa.gov. Finally, you can always email us any questions you have. For payment issues, email EN Payments Helpdesk at yourtickettowork@ssa.gov. For questions and issues related to Ticket assignment, the Service Provider Website, and the Ticket Portal, it is ENSystemshelp@yourtickettowork.ssa.gov.

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As another reminder for you all, any payment topics that you have that you would like us to discuss in this forum, we invite you to share those topics so that we can make sure that we are providing you with the information that you are interested in discussing. Our goal is to help educate you and provide clarification on processes and procedures related to payments. Please send your topics to the EN Payments Helpdesk at ENPaymentshelpdesk@yourtickettowork.ssa.gov. I will hand it back over to Katherine to start our Q&A session.

Katherine Jett: Thank you, Nicole. Those were some great updates. Now at this time we would like to transition to the interactive Q&A session.

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Before we get started, we have a few helpful tips to assist everyone during this interactive Q&A session. Again, just ask one question each time you are called upon. Ask questions that are topic related from the ones that were presented today. And then keep your questions general in nature. If you have case-specific questions, remember that you can email the ENPaymentshelpdesk@yourtickettowork.ssa.gov. Before we begin, we will give you a quick reminder of how to ask a question. If you are on Teams at the meeting today, in the MS Teams application, you will click the raised hand icon. You will be given audio access as well as video access if you like. Then click your microphone at the top of the screen to unmute and ask your question. If you have joined via the phone, you will need to click *5 to raise your hand. We are going to give you audio access, and then you will just click *6 to unmute and ask your question. All right. We are going to head over to Jalin and see if we have anyone with a raised hand. Jalin?

Jalin: Hi Katherine. We do have Cathy here. Cathy, your audio and video are active. Please click the microphone to unmute and activate video if you would like to ask your question.

Cathy: Thank you. The question I have is something that happened once a few months ago and it just happened recently. So, I figured I'd ask it here. I have two Ticketholders out of 46 that we have altogether, and both of their them — once six months ago, and one now a month or so ago — the Tickets were terminated without the individuals knowing anything about it. I was able to get one of them on the phone with Social Security so we could have a three-way call to try to figure out what's going on. But once the second one happened, I did notice that something I had discovered out of both is that they are both involved in overpayments right now. If a Ticketholder is working above SGA, the Ticket has been paying regularly for a couple of years, but the person ends up having overpayments — this is SSI specific — does their Ticket get terminated because of that?

Nicole Black: Hi Cathy. Thank you for your question. This is one that's not specifically related to the topics we had today, so I would recommend, for this, reach out to ENService.

Cathy: I tried. I thought I'd throw it out here. I thought you might say that but thank you.

Katherine Jett: Yeah. I'm so sorry. Thank you, Cathy.

Cathy: Nice to try.

Katherine Jett: Thank you, Cathy. Jalin, do we have anyone else with their hands raised? I see we have Alexis.

Alexis: Hi Cathy. There's sometimes a systematic issue that does happen with terminating Tickets. Before going and reaching out with the beneficiary, you can also email the Helpdesk for this specific person and we can look into it to see if it was an erroneous termination and, if it is, we can have it corrected for you.

Katherine Jett: Thank you, Alexis. All right. Jalin, can you identify our next question?

Jalin: Yes, we have Brian. Your audio and video are active. Please click the microphone and unmute. Activate video if you'd like and ask your question.

Brian: Hi, yeah. I have an odd question. I have a client whose employer does not put the pay start and pay end dates on the pay stub, just the pay date. But the employer gave me a spreadsheet that lists, for this pay date, the pay period begins, the pay period ends. I tried submitting that along with the pay stubs and it was still denied because there were no pay period start and pay period end dates. Is there a workaround for this?

Nicole Black: Hi Brian. Thank you for your question. I wanted to make sure that I captured that properly. You have a Ticketholder whose employer does not provide you with the necessary information on the pay stubs required for us to utilize those as evidence of earnings?

Brian: Yup, that's — yeah.

Nicole Black: All right. So, with that, we would need a Supplemental Earnings Statement from that employer or an Employer-Prepared Earnings Statement, and that would help us to be able to know exactly how to key those earnings properly so that they are entered into the system the right way for that Ticketholder.

Brian: So, the spreadsheet that the employer sent me with all that information is irrelevant?

Nicole Black: Unfortunately, that is not a document that has been approved to use. The documents that are approved to use when we are looking for supplemental information to be able to use those pay stubs would be the Supplemental Earnings Statement or the Employer Prepared Earnings Statement.

Brian: All right. Thank you.

Nicole Black: You're welcome.

Katherine Jett: Thank you, Nicole. And, Brian, to access that, you will need to go to the Resources section and look under Forms on the Your Ticket to Work website. Thank you again. All right, Jalin.

Jalin: Yes, we have Amanda. Amanda, your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Amanda: Hi! I have a question about submitting for a P1M3 payment. The first two were denied due to prior earnings, and when I called the Ticket Help Line, they helped guide what month to choose for Milestone 3, which I submitted for, and that was denied based on the wrong month. So how do I get better guidance on what month to bill for because I don't want to just keep guessing and submitting payments and having it denied.

Nicole Black: Hi, Amanda.

Amanda: Hi!

Nicole Black: How are you? Thank you for your question. This does sound like it's something specific. If I could ask you to send an email to the Payment Help Desk with the work case numbers in question. Ask them to send that to my attention specifically, and then I will be able to look at it and see what I can do to help you out.

Amanda: Perfect. Thanks, Nicole.

Nicole Black: You're welcome.

Katherine Jett: Thank you, Amanda, and thank you, Nicole. All right Jalin. Next up?

Jalin: Yes, we have Michael. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Michael: Thank you. Good morning, everyone. And good afternoon to some of you. My question is — we had an Outcomes payment we submitted, and we had the gross wages. We had the paycheck stubs. But because the taxes weren't taken out, they denied the payment. But I don't understand that because we were looking at gross wages, not net anyway, so why would it matter if the taxes were taken out or not? And what can we do to get this fixed? I don't understand that at all.

Nicole Black: Hi Michael. Thank you for your question. This also sounds like something that is case specific, and I would need to look at that one specifically to see what is going on and then I could give you a better answer. I would ask you to do the same as I asked Amanda. Email the Payment Helpdesk with that reference number. And in the email just ask them to forward it to me so that I can look at it, and I can take a deeper dive and figure out what's going on to help you out.

Michael: Thank you.

Nicole Black: You're welcome. Oh, Michael. One more thing. What's your EN name so I can make a note for myself? Sorry about that.

Michael: Not a problem. PRIDE Industries.

Nicole Black: PRIDE. Thank you.

Katherine Jett: Thank you, Michael, and thank you, Nicole. Jalin, do we have another attendee with questions?

Jalin: Yes. We have Melinda. Your audio and video are active. Please click the microphone to unmute — activate video if you'd like to ask your question.

Katherine Jett: Hi, Melinda.

Melinda: Hi! I had a quick question about Milestone 1 payments. If the earnings are already established in the Portal, we just need PoR to submit those requests. Correct?

Nicole Black: Yes, ma'am. Hi, Melinda.

Melinda: Hi! And then pay stubs are considered proof of relationship, correct? So, if they are missing maybe the employer's name, would that still qualify for proof of relationship, or would we still need to fill out a PoR form.

Nicole Black: That's a really good question, Melinda. I'm going to go ahead and restate it. For your Phase I Milestone 1s, and if it shows in the system that the earnings are verified and you're submitting pay stubs as proof of relationship, but they happen to be missing a key piece of information, will we accept them?

Melinda: Yes.

Nicole Black: All right. The answer is yes. We would accept them as proof of relationship, but we would not be keying those earnings because we don't have everything that we need.

Melinda: Okay, great. Thank you so much.

Nicole Black: That is acceptable. You're welcome.

Katherine Jett: Thank you, Melinda. Thank you again, Nicole. All right. Jalin? I see we have another raised hand.

Jalin: Yes. We have Jared. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Katherine Jett: Hi, Jared.

Jared: Good afternoon. Hello. How's everybody doing?

Katherine Jett: Doing good. How are you?

Jared: Excellent. Excellent. Thank you for asking.

Katherine Jett: Yes.

Jared: My question was during the slides; would you go over it again about Phase 1 through Phase 3 Milestones. What I did catch was it was accepted through the Portal, but one of the

Milestones had to be accepted through ePay. I don't know if I caught that 100%. I was wondering if you could go over that briefly.

Nicole Black: Absolutely. Hi, Jared. How are you?

Jared: Excellent. Hello.

Nicole Black: Jared's question is referencing which payments have to be requested through the Portal during ePay. Is that correct?

Jared: Yes, it is.

Nicole Black: Your Phase 1 Milestones 1, 2, and 3 all must be requested through the Ticket Portal during ePay. And they need to be accompanied with the appropriate proof of relationship for that case. Your Phase 1 Milestone 4, your Phase 2 Milestones, and your Outcomes are paid through ePay, and those are the cases that we ask you to hold onto unless you specifically have evidence of earnings to substantiate that payment. We want you to hold on so that we can make those payments through ePay if they are available to you so that we do not risk having a duplicated claim month. Did that help?

Jared: I think so. So ePay is — I guess I may not have used the right term. When I go through the Ticket to Work Portal and I submit that, is that an ePay or is that through the Portal? Or are those two different things?

Nicole Black: When you request your payments through the Portal, that is a payment request that is initiated by the Employment Network. That is separate. ePay is a manual process that is facilitated through SSA once a quarter and it is a file that is generated. We go through each SSN one by one to see if there's payments available based on the earnings that are in SSA's database.

Jared: Okay.

Nicole Black: Did that help?

Jared: Yes, it did. Thank you.

Nicole Black: Okay, good.

Katherine Jett: Thank you, Jared. Thank you, Nicole.

Nicole Black: You're welcome.

Katherine Jett: All right, Jalin.

Jalin: Yes, we have Amanda. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Amanda: Hi. So, I have a procedural question. If an ePay file finishes and we believe we were owed a Phase 1 Milestone 4 or a Phase 2 or Outcome payment and we didn't receive it, when we go into the Portal to request it, do we still have to attach proof of earnings, or do we just submit it as, like, a nudge, like, hey, perhaps you should look at this one?

Nicole Black: Hi, Amanda.

Amanda: Hello.

Nicole Black: Okay. I'm going to restate this one. The question is, as the Employment Network, and you feel like you should — based on earnings that should be the system that you are owed a Phase 1 Milestone 2. I'm sorry, a Phase 1 Milestone 4, a Phase 2, or an Outcome payment but it did not get captured in ePay. What should you do as an Employment Network to request this payment?

Amanda: Yes.

Nicole Black: Okay. If it says, "earnings proven in the system," you can submit that payment and we will investigate it further. But the best practice would be if you have evidence of earnings, to justify or validate that the payment request should be made, or the payment should be made to you. You can go ahead and submit that payment with your evidence of earnings and we will process it accordingly.

Amanda: Okay. Because I had one where we did receive payment, but then the next time around we did not. And so, I thought, oh, I just submit it without anything attached to it and it got denied. So, I will go back and make sure I add those to it.

Nicole Black: All right. Thank you, Amanda. And, again, for you also, if this is something case specific that you want us to take a deeper look into, same thing, go ahead and email the Payment Helpdesk with that reference number and ask them to send it to my attention and I will look at it.

Amanda: Very appreciated.

Katherine Jett: Thank you, Amanda. Thank you, Nicole. Looking at the time, we have — almost a half-hour left for questions. If you'd like to ask a question, if you're via the phone, press *5 and you will be unmuted by the facilitator. And just press *6 to unmute yourself. If you're in Teams, you just need to raise your hand, and we'll give you audio and video access and just click the microphone to unmute. And Jalin, I see we have a raised hand.

Jalin: Yes, we have Tina. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Tina: Thank you. My question is about self-employment. Are you able to hear me, okay?

Katherine Jett: Yes, ma'am. Hear you great.

Tina: Perfect. Just making sure I did the mic right. Anyway, I've got an individual who's self-employed and we've received a Phase 1 Milestone 2 payment on her, and then she moved to Outcome. My question is — she is now beyond the two years of being able to submit for payments and we're behind because it's self-employment, have to wait for taxes. How do we go about capturing 2023 for payments when she's finally not in current pay? And we're working with the local office to get that straightened out.

Nicole Black: Hi, Tina. How are you?

Tina: Hi, Nicole. Good.

Nicole Black: This one is also a little case specific. Since you're coming up on the aged claim, or the 24 months — or you're already there — you should go ahead and request payment for the applicable claim month so that that's documented in the system and continue to work with your field office to try to get the benefit status updated properly. And work with your Ticketholder to make sure that they are doing what they need to do on their end to get their income reported to SSA with their tax returns.

Tina: Okay. So, we've already submitted payment. It's been denied. So, I've done that part, so now it's just working with the local office and the beneficiary to make sure that this gets tidied up in their office. Okay.

Nicole Black: Yes, ma'am.

Tina: Okay. Thank you.

Nicole Black: You're welcome, Tina.

Katherine Jett: Thank you, Tina. Thank you, Nicole. All right, Jalin, I see another raised hand.

Jalin: Yes. We have Amanda. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Katherine Jett: Good afternoon, Amanda.

Amanda: Hi! I just had a follow-up question to two people prior to me. She had asked about requesting payments for I think it was somebody whose Ticket was deactivated. Is there a timeframe of when you can put in the claim for Tickets after deactivated?

Nicole Black: It's also case specific. We do have the 24-month aged claim rule, and then there's also a specific amount of time that an EN can request a payment once the Ticket has been unassigned. But it depends on whether it was unassigned by the EN, if it was terminated by SSA, or if it was unassigned by that Ticketholder. And Alexis is here.

Alexis: Are you referring to if a Ticket is terminated and you don't believe it's correct?

Amanda: No. One time it was a Ticketholder requesting to change providers, and one time it was on our end requesting that.

Alexis: If you're talking about unassigned Tickets based on a beneficiary or EN, there are specific rules about that. I was going to comment that if you believe the Ticket was terminated or unassigned erroneously, then there's no real time frame on that. We can look into it. But if it was done by the beneficiary and/or the EN, there are specific rules to follow in regard to that.

Amanda: Okay. Thank you.

Nicole Black: You're welcome.

Katherine Jett: Thank you, Amanda. Thank you, Alexis and Nicole. All right, Jalin. I see we have another raised hand.

Jalin: Yes. We have Samantha. Your audio and video are active. Please click the microphone to unmute and activate the video if you'd like to ask your question.

Katherine Jett: Good afternoon, Samantha. Hi!

Samantha: Good afternoon. I wanted to ask, when we have a client that requests unassignment and they fill out the unassignment form that they would like to be unassigned, so we fax that in showing that it's their choice to be unassigned, how many payments are we eligible for after that unassignment?

Nicole Black: Hi Samantha. How are you?

Samantha: Good! How are you?

Nicole Black: I'm well, thank you. It depends, honestly. It depends on additional information that's provided by you, the Employment Network, after that Ticket has been unassigned by the Ticketholder. And a Certification of Services would need to be accompanied with a payment request. We'll review the case and then we would let you know how many additional payments you would be eligible for. If you tell me what your EN is, I can make sure that we get you the information — same to you, Amanda — on those specific guidelines in the TPA. Who are you with?

Samantha: Full Circle Employment Solutions.

Nicole Black: Got it. All right.

Kim: Yeah. I think if we can, the general rule for that is very specific based on services, but I think just the general rule for ENs to know is that when a Ticket is unassigned by an EN, then of course the EN is no longer entitled to receive any payments after unassignment. If the Ticket is unassigned by the Ticketholder, then the EN, based on services provided, may be entitled up to 12 payments. And that is up to 18 months after Ticket unassignment. But, like Nicole said, that will be based on services that you have provided to the Ticketholder. So, you can still submit for payment, but you would have to submit evidence of earnings. You would need to submit a Certification of Services form. All of that is located on the website. So, you would have to provide a list of detailed services that you are providing, so you have a time frame. So, you have to submit for these payments within 18 months of the Ticket unassignment date, and SSA may pay you up to 12 payments. Right? That's in a perfect world. Right? Eighteen months after unassignment, up to 12 payments. But then there are other factors like if the Ticket is reassigned. But that's just the rule that there could be possible payments if it's unassigned by the Ticketholder. But if you, as the EN — if you unassigned the Ticket, you're basically saying I am no longer assigned. I'm no longer providing services to this Ticketholder. So, you will not be eligible for payments after that month of unassignment. Just remember that if you unassign it, then you cannot submit for any claim months after that unassignment month. Hopefully that helps. But like Nicole said — if you want to reach out to her. But if the Ticketholder unassigned it, it would be based on services provided. So hopefully that helped.

Samantha: It did. Thank you.

Katherine Jett: Thank you, Samantha. Thank you, Kim. And thank you, Nicole. All right, Jalin, I see we have another raised hand.

Jalin: Yes. We have Jeanine. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Katherine Jett: Hi, Jeanine.

Jeanine: Hello! Can you hear me?

Katherine Jett: I can hear you.

Jeanine: Wonderful. Hi Nicole, and hi everybody else. Hey, when you were talking about the categories that you would need to show proof of your services for someone who's unassigned, is there a category that the services need to fall in, and is there a guideline for us to look at so that we can categorize what the services are?

Nicole Black: Hi Jeanine. Thank you for that question. So, it's similar to the Proof of Relationship form that you submit. We're looking for confirmation or proof of the services that you provided to that Ticketholder during the time the Ticket was assigned to you. The Certification of Services form is what you would complete, and it specifies the information that would need to be shared for us to consider additional payments for you. And I will follow up with you on that as well.

Jeanine: Wonderful. Wonderful. Because, you know, when you're logging and blogging where you're writing out all the services that you've done when you've met with somebody. I know that benefits counseling would fall into one. Case management, advocacy. So, I was just wondering what guidelines would help us to do the logging and blogging and categorize what they do fall in for a history.

Nicole Black: Yes. That's an excellent question. So, it somewhat aligns with the proof of relationship. We're looking for the actual services that you provided to that Ticketholder over the course of time that you worked with them to be able — there's Kim — to be able to determine what it is. So, yes, it does fall under benefits counseling. What's the word I'm looking for? When you're helping them with their job situations as far as communicating with their employers, any type of — the word is just slipping my mind right now.

Kim: I will help you out. Use your IWP as your guide. That's your agreement when you meet with your client and you identify services, right? That's going to help them meet their short-term and long-term goals. So, you identify services, and it's not limited to that. Right? Because as you're working with your client, there may be new services needed. You can start with that as your guide because, like Nicole was saying, it's similar to your proof of relationship. If I can offer a difference, when you're requesting — when you're using your proof of relationship, right, and for your Phase 1 Milestones 1 through 3, we're looking for those payments. We're looking at a specific time. That's a specific window of time when you're asking for your Phase 1 Milestones 1, 2, and 3. When you're looking for your Certification of Services, once the Ticket has been unassigned by the Ticketholder, we're looking at the entire picture of services. So, we're looking at the duration of Ticket assignment. So, yeah, so usually when you're looking at a guide, instead of putting it in a category, look at your IWP and the services that were agreed upon with you and your Ticketholder. Let that be your base. Let that be your guide. So, we want to see everything that you provided. That would be, instead of kind of putting it in a box, if you will, just everything that you provided for your Ticketholder is what we will look at.

Jeanine: Okay. So, like when somebody calls me, I will head it as "call from beneficiary" and then I will put in there everything we did. Would it be easier for identifying what those services fall in if I changed the headers to be more specific such as "benefits counseling," "case management," "advocacy," you know, all of those. Would it be easier for that to be identified if I had to submit something like that?

Kim: I would say yes. I think if you put it in some type of way, I think it would help. But I think we're going to do a detailed search, right, just to look at the services you provided. But, yeah, if you're going to put it into a group, I don't think it would hurt. Let me just say that. I don't think it would hurt.

Jeanine: Okay. Wonderful.

Nicole Black: To piggyback on what Kim said, it definitely wouldn't hurt because we do read them line for line; we analyze everything. But just for you to make sure that you're capturing all the information needed to give us the best picture of what you have done with this Ticketholder, if that's helpful to you, I would definitely encourage it.

Jeanine: Well, I'm very detailed and I didn't know if I was doing overload for your guys, or just "keep it up."

Nicole Black: No, ma'am. Not at all, Jeanine.

Jeanine: All right. Thank you so much.

Nicole Black: You're welcome.

Katherine Jett: Thank you, Jeanine. Thank you, Kim and Nicole. All right Jalin. I see another raised hand.

Jalin: Sorry. I was muted. We have Kim. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Kim: Hi. Thank you. Let me just run down a couple of scenarios because I'm hearing some beneficiaries will request to be unassigned, and then, well, we also have the option to unassign them, too, especially with that two-way communication, if they're not maintaining their engagement. So, if the EN is removing the client because of a lack of engagement, then we would use the Portal to unassign them. But if a client asks to be unassigned, do we not unassign them through that Portal, too?

Nicole Black: Hi Kim. Thank you for your question. The payments are handled differently. So, if an EN unassigns a Ticketholder via the Portal, your last eligible claim month is the month prior to Ticket unassignment. If a Ticketholder unassigns their Ticket, there's a different way that the additional payments are reviewed. I guess a best practice would be if your Ticketholder wants to unassign the Ticket, have them fill out that unassignment form, submit that, and that way let it be unassigned that way versus you, as the EN, going in and unassigning them in the Portal.

Kim: Okay. And so, if we would help them fax that request to unassign, is that when we would attack the certification of services?

Nicole Black: No. The unassignment is independent of submitting the Certification of Services. So that's a different process. That is faxed via the manual payment request option, and I will also get you the information you need. So which EN are you with?

Kim: I'm with CareerSource Suncoast in Manatee, Sarasota County, Florida.

Nicole Black: CareerSource Suncoast?

Kim: Yes.

Nicole Black: All right. I wrote it down. I got you. So, I will send you that information as well as it relates to unassignments and what those process steps are to help you out there.

Kim: Perfect. Thank you so much.

Nicole Black: You're welcome.

Katherine Jett: Thank you, Kim. Thank you, Nicole. All right. Jalin, I see we have another raised hand.

Jalin: Yes, we have Clark. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Katherine Jett: Hi Clark. If you will click your microphone up top, that will open it up and you can ask your question, sir.

Clark: Can you hear me? I'm sorry.

Katherine Jett: Yes. Hear you great. Loud and clear.

Clark: Just with the question, I was kind of confused. I haven't unassigned a Ticketholder in a while. I thought you got two options in the Portal. You can say that the client requested it, and from what Nicole was saying it would still be in a situation where you're looked at as you unassigned it if you click the option where you're saying that the Ticketholder requested to be unassigned from you?

Nicole Black: Okay. Yeah. Thank you for your question. I was about to ask for Alexis to chime in as it relates to how the Portal looks from the EN side.

Alexis: The Portal does not have an option for an EN to unassign a Ticket saying that the beneficiary requested it. So, in order for the unassignment to be labeled as "beneficiary unassignment," you have to fax the form. If you want to label the unassignment as the EN has decided to unassign the Ticket for whatever varying reason you've chosen, which we don't need to know, then you can do it in the Portal, and it will be labeled as "the EN requested the unassignment." The Portal no longer has the option for the EN to take the task on behalf of the beneficiary.

Clark: Oh, thank you. Can you still hear me?

Nicole Black: Yes.

Clark: Thank you. Because I was just wondering if you were saying it was there and now it's no longer there. Okay.

Alexis: I believe it was there at one point, but we have removed it so that the beneficiaries can take the action themselves since they want to do it; therefore, they should take the task.

Clark: Oh. All right. Thank you. That's all I needed.

Nicole Black: Thank you, Clark.

Katherine Jett: Thank you, Clark. Thank you, Alexis and Nicole. Okay, Jalin. I see we have a couple raised hands.

Jalin: Yes. We have Laurie. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Katherine Jett: Good afternoon, Lori.

Lori: Hi. This is Lori from Goodwill Industries Ticket to Work Program in Washington State. And what I'm asking is more about the e-processing that's occurring in January, or they're calling for January. What date did that start?

Nicole Black: The ePay file, Hi Lori. Sorry about that. Thank you for your question. The ePay file started processing on Friday.

Lori: On Friday.

Nicole Black: The 31st.

Lori: Do we normally have an announcement or an email that comes out?

Nicole Black: Yes. The GovDelivery should go out today or tomorrow. Yeah. You haven't missed it.

Lori: Okay. Thank you. That's it.

Nicole Black: You're welcome.

Katherine Jett: Thank you, Lori. All right, Jalin. Who is our next participant with a question?

Jalin: Yes, we have Paul. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Paul: Hi. Good afternoon.

Katherine Jett: Good afternoon, Paul.

Paul: I had a quick question. I already kind of know the guidance, but I can't find the source of the guidance. So, whenever I have a self-employed person, so like a 1099 client, if I recall correctly, we wait for their established earnings to show up on file after they've submitted their taxes and then we bill on established earnings. I could be wrong on that, but I just couldn't find it in the red book or any policy that actually states it on paper.

Nicole Black: Hi, Paul. Thank you for your question. And you are correct. When you have a self-employed Ticketholder or someone who receives a 1099, you will have to wait for their earnings to be recorded and validated on SSA's records. And then at that time you could submit a payment request for that Ticketholder to get the payments that you should receive.

Paul: Great. Is that stated anywhere, I want to screenshot it and send it to one of my reps so that they have the policy for their own guidance?

Nicole Black: I will ask Kim or Alexis to help me with this one.

Kim: I do not know right off if it's stated, but we definitely can take this offline and check to make sure.

Paul: Great.

Kim: And if we get your information we can follow up.

Paul: Great. Wonderful. Thanks. I'm assuming someone will reach out privately for that information.

Nicole Black: Yes. Paul, what EN are you with?

Paul: America Works of New York Inc.

Nicole Black: All right. Got it. I will follow up with you.

Paul: Wonderful. Thanks.

Katherine Jett: Thank you, Paul. Just want to let everyone know we have about seven minutes left for today's meeting. If you have a question, go ahead and raise your hand and I will just pause now. Okay. Jalin, I see we have two individuals with questions. Go ahead.

Jalin: Yes. We have Jackie. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Jackie: Hi, can you hear me?

Katherine Jett: Yes. Hi, Jackie.

Jackie: And you do not want to see this video. I want to make a comment about a person who had asked a question earlier. It was Michael. I think it's PRIDE Industries about not being able to be paid if there's no taxes taken out. We have a similar situation and it's actually an IRS rule that if a family member is taking care of another, for example, severely disabled person and are paid through the Disability Administration system, whatever it is in your state, taxes are not required to be taken out. No taxes whatsoever, and they are considered an employee of their family member. So, we have had to fight this because I have a couple of people in situations like that. And I just wanted that broadly known to raise awareness of that particular IRS rule. They will never have to take out taxes from these folks if they're working to help with job development or socialization or any kind of thing, they're working with their family member on. And they are making over SGA and reaching towards independence, which is the goal of Ticket to Work. So, I just wanted to share that broadly. And thank you.

Katherine Jett: Thank you, Jackie. All right. Jalin, I see we have another raised hand.

Jalin: We have Selena. Your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Katherine Jett: Hi, Selena.

Selena: Hello. I will try to make it quick. I know I have, like, one minute. So, when we submit for payment, we have been using eFax to submit the supporting documentation, and it's always coming out that it is not received. Troubleshooting and calling the helpdesk, it comes to find out that when we are eFaxing, our provider is automatically attaching a cover sheet. So, is the only way to troubleshoot that would be to mail in the supporting documentation since we only have eFax? We don't have a manual fax machine.

Nicole Black: Hi Selena. Alexis is going to assist you with that.

Alexis: Selena, check with your eFax provider. There should be a way to disable that fax cover page.

Selena: Our IT department opted not to do that for all business faxing.

Alexis: Unfortunately, with that cover page, that is exactly why it's not coming through.

Selena: Okay.

Alexis: And that bar code cover page must be the first page of the fax. Many, almost all, I would say, 90% are using eFaxes and in order for it to come through, you will have to disable that cover page that is going on automatically. If not, there is no other way to get that to us besides mailing it because the cover page, the bar code has to be the first cover page. You know, maybe there's a way you can disable it for certain situations because otherwise, you know, you're going to be stuck mailing things for a very long time.

Selena: Yes. Okay. Thank you so much.

Alexis: There's no other option. Hold on. Katie might be chiming in here, too.

Katie: I just want to add, to make sure it's clear, please do not fax to that number on the cover page unless the cover page is the first page. You will be faxing to an actual fax machine and you will be sending PII to the incorrect location. So please do not attempt to fax to that number on that fax cover page without having that fax cover page as the first one. So, as you just mentioned, you're having an issue because, you know, you're faxing to that phone number with an incorrect cover page. So, stop doing that.

Selena: No, it's coming out blank because it's taking the body of the email as the cover page. So, it's being not received on your end according to the Payments Helpdesk.

Alexis: The fax is going somewhere, as Katie stated. It's going to be a Denver region fax machine.

Katie: It's a real fax number. That's why we ask you to, like Alexis was saying, about the software. You know, we really need that very first page with the bar code to be first.

Selena: Okay. Thank you.

Katherine Jett: Thank you, Selena. Thank you, Katie, Alexis, and Nicole. Okay. We have approximately two minutes left if anyone else has a question. And I will pause. Okay, Jalin, I see we have another question.

Jalin: Yes. Casey, your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Katherine Jett: Hi Casey.

Casey: Hi! How is everyone?

Katherine Jett: Doing good. Thank you.

Casey: Good. I just wanted to tell you guys — great job. And I appreciate everything that you do. And I love these EN Payment Calls. It's always very informative. So just wanted to say thank you. That's all.

Nicole Black: Thank you, Casey. I appreciate that.

Katherine Jett: Thanks, Casey.

Casey: No problem, hon.

Katherine Jett: Okay, Jalin, who is our next individual?

Jalin: Yes. Tina, your audio and video are active. Please click the microphone to unmute and activate video if you'd like to ask your question.

Tina: Hi. Thanks again. So, I've got a quick question here on somebody that's working abroad. I believe we can submit for payment with this individual, but I was a little uncertain about how do we look at SGA or Trial Work Level or SGA level earnings? Is it based on the rate that they are being paid out of country, or U.S. dollars?

Nicole Black: Hi, Tina. I'm going to defer to Kim, Alexis, or Katie with that one because that is a new one for me.

Alexis: That sounds awfully specific. I would send it to the Helpdesk so we can all discuss it.

Tina: Okay. Absolutely. Thanks.

Nicole Black: Thanks, Tina.

Katherine Jett: Thank you, Tina. Well, all right. I see no more raised hands and we are at that time, everyone.

Next slide please.

We would like to thank everyone who participated today with your questions, and Social Security and Nicole, as the Ticket Program Manager. Our next EN Payments Call is scheduled for Tuesday, May the 6, from 1:00 to 2:00 p.m. Remember, if you have any suggestions for, you know, any topics for the next EN Payments Call, just go ahead and email ENPaymentshelpdesk@yourTickettowork.ssa.gov. Again, thank you, and have a great day. This call is now concluded.