



QUARTERLY ALL EN PAYMENTS CALL RECAP MAY 5, 2026

Welcome

Ben Lydecker (TPM)

Ben welcomed everyone to the call and covered logistics and the agenda, which included: the Ticket Evaluation Reminder, January ePay File Statistics, ePay Reminders, Payments Help Desk Reminders, EN Overpayments, Phase 1 Milestone 1 Payment Evaluation, Phase 1 Milestones 1-4 Earnings Requirements, and Name Verifications.

Resources were available at the end of the presentation, as well as the question-and-answer forum.

Ticket Evaluation Reminder

Seth Hartig (SSA)

Seth Hartig informed ENs that SSA is currently evaluating the Ticket to Work Program and, as part of this effort, Mathematica will soon be distributing a survey and outreach materials to ENs and Ticketholders. Information about the survey:

- SSA is evaluating the Ticket to Work Program to help SSA understand best practices and identify potential improvements.
- **Survey:** Mathematica will email a link to the survey from ttwevaluation@mathematica-mpr.com to the Program Contact at each EN and will provide a \$40 gift card for completion of the survey. Each EN will also receive a letter in the mail about the survey, which will include a link to the survey.
- **ENs:** Please add the above email address to your "Safe Senders" list or check your spam folders for this email once the survey is live.
- **Interviews:** Mathematica will contact Ticketholders by mail and phone inviting them to be interviewed (\$40 gift card for completion).
- **ENs:** Please complete the survey and encourage your Ticketholders to participate in the interviews, if contacted.
- **For questions:** Eleanor.Stinnett@ssa.gov and Seth.Hartig@ssa.gov



January ePay File Stats

Nicole Black (TPM)

TPM completed the January ePay file in March 2026, with the following results:

- Total claims paid: 14,000
- Total SSNs paid: 4,555
- Total amount paid: \$7,191,424.00

ePay Reminders

Nicole Black (TPM)

Nicole informed ENs that SSA started processing the April ePay file, and provided the following reminders:

- Phase 1 Milestone 4 is paid via ePay, but ENs must still submit payment requests for Phase 1 Milestones 1-3 through the Ticket Portal with proof of relationship.
- Unassigned Tickets are not included in ePay.
- ENs must have passed their annual Services and Supports Review.
- The ePay file is processed in SSN order, not Provider ID (PID).
- 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 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.
- Please allow TPM to pay all available claims via ePay before requesting payment via the Ticket Portal.
- PII violations 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.
 - Example: If an EN violates the PII rule while a file is currently being processed (i.e., February), they will be removed from the ePay file.



Payments Help Desk Reminders

Nicole Black (TPM)

Payment Inquiries

Nicole reminded the ENs about who the Payments Help Desk can communicate with when inquiring about a payment request:

- All communication regarding Ticketholders and ENs must be with suitable EN staff, (e.g., approved Portal users, Program Contacts, Signatory Authority).

Personally Identifiable Information (PII)

Nicole reminded the ENs how to transmit PII to TPM for payment requests.

- If an EN needs to submit PII, the submission must be done via fax/mail. ENs must not send PII via email.
- ENs should use the SSA reference number when emailing payment inquiries to the Payments Help Desk.

EN Overpayments

Nicole Black (TPM)

EN Overpayments

Nicole provided guidance to the ENs outlining what can lead to an EN overpayment, how SSA manages dispute and recovery processes, and steps ENs can take to help prevent future overpayments. Nicole cited the current Ticket Program Agreement (TPA) [*TPA - Part III, Section 5\(F\)*](#)

- What causes an EN overpayment?
 - EN overpayments can result from a variety of causes, including adjudicative errors and systems problems and/or limitations.
- How does an EN repay an overpayment?
 - “When SSA becomes aware of an EN overpayment, SSA will send the EN a notice via email to the Payments Contact explaining the circumstances and the amount of the overpayment.”*



- The notice states:

Effective November 1, 2018, the Social Security Administration (SSA) will no longer accept checks as repayment for Employment Network (EN) overpayments. ENs will have 10 days to dispute any overpayments. After that time, SSA will initiate payment recovery using first, pending evidentiary payments from the named Ticketholder(s) and second, from any other Ticketholder(s) assigned to the EN where payments may be due until SSA recoups all overpaid funds.
- How does an EN dispute an overpayment?
 - Submit a response to the overpayment notice (email) within 10 business days from the date on the notice to dispute the determination and provide any additional evidence.
- How does SSA recoup an overpayment?
 - “If the EN does not respond to an EN overpayment notice in a timely fashion (10 business days), and the EN is currently receiving payments, SSA will initiate recovery of the EN overpayment amount from future payments on any Ticket assigned to the EN. Failure to resolve overpayments or repeated payment suspensions may result in further recovery action and/or termination of the EN’s TPA.”*
 - SSA will initiate payment recovery using pending evidentiary payments (including ePay cases) of the named Ticketholder(s)
 - If there are no pending payments for the named Ticketholder(s) or the pending payments do not cover the entire overpaid amount, money is withheld from other Ticketholder(s) assigned to the EN where payments may be due until SSA recoups all overpaid funds.
 - SSA will seek recovery of any outstanding overpayments following termination of a TPA.
 - An EN shall be responsible for the repayment of any outstanding overpayments following termination of their TPA
- How does an EN prevent an overpayment?
 - Every overpayment case is different, but ENs can take steps to reduce the risk. When working with Ticketholders, ask about the source of any look-back earnings, such as:
 - Short-term or long-term disability payments



- Previously unreported work activity
- In addition, ENs should be aware of the following regarding Ticketholder benefit status:

“If an appeal by a Ticketholder regarding entitlement or eligibility for disability benefits results in a revised determination, the revised determination could affect an EN's entitlement to payment for the period(s) covered by the determination. If such a determination results in an improper payment to the EN, SSA will not seek to recover the amount of the overpayment.”*

Phase 1 Milestone 1 Payment Evaluation

Nicole Black (TPM)

To ensure ENs understand SSA's requirement that all payments be requested sequentially, Nicole reviewed the importance of submitting Phase 1 Milestone 1 (P1M1) first and outlined the criteria SSA uses when determining P1M1 eligibility.

Policy

Policy: All payments must be made in order

This policy is important because it requires ENs to submit a Phase 1 Milestone 1 (P1M1) request as the first payment on a Ticket to start receiving payments.

SSA evaluates the P1M1 payment request for:

- A prior VR Cost Reimbursement payment
- A successful VR case closure in the 18-months prior to the first Ticket assignment
- Earnings of TWL or greater in the month prior to the first Ticket assignment
- An acceptable proof of relationship

P1M1 must be addressed as paid or denied with an exclusion for an EN to be eligible to receive the next payment.

If an EN requests P1M1 and it is denied with a reason that is not one of the exclusions below, the EN will need to resubmit P1M1. ENs cannot skip to the next Phase 1 Milestone (P1M2).



Exclusions:

Code	Denial Reason
07	PAYMENT MADE UNDER VR FOR SAME PERIOD
08	DUE TO VR SERVICES PHASE 1 MILESTONE CAN'T BE PAID
12	NOT ELIGIBLE FOR PAYMENT DUE TO LOOK BACK EARNINGS

Denial Reasons and Proof of Relationship

Nicole also reviewed the key P1M1 exclusions and documentation requirements that determine whether an EN can move forward in the Phase 1 payment requests. The following information explains how SSA applies each exclusion code, what ENs must submit to establish proof of relationship, and how ENs can use Ticket Portal denial comments to determine next steps in the Phase 1 Milestone evaluation process.

Code 07 - PAYMENT MADE UNDER VR FOR SAME PERIOD

- This exclusion applies to cases where a State VR agency received a Cost Reimbursement payment for the same Ticketholder prior to the EN's request for P1M1.
- ENs are not due any Phase 1 Milestones. Phase 1 Milestones 1-4 will be automatically denied by SSA at the time of the P1M1 request.
- If the EN is eligible for additional payments, SSA will make those payments at the time of the P1M1 request.
- The SSN is now eligible for ePay because all Phase 1 Milestones 1-4 have been addressed.

Code 08 - DUE TO VR SERVICES PHASE 1 MILESTONE CAN'T BE PAID

- This exclusion applies to cases where a State VR agency had a successful case closure in the 18 months prior to the first Ticket assignment.
- ENs are not due any Phase 1 Milestones. Phase 1 Milestones 1-4 will be automatically denied by SSA at the time of the P1M1 request.
- If the EN is eligible for additional payments, SSA will make those payments at the time of the P1M1 request.
- The SSN is now eligible for ePay because all Phase 1 Milestones 1-4 have been addressed.



Code 12 - NOT ELIGIBLE FOR PAYMENT DUE TO LOOK-BACK EARNINGS

- This exclusion, as it relates to P1M1, applies to cases where there are earnings at TWL or greater the month prior to the first Ticket assignment.
- SSA performs an evaluation of all the earnings on SSA's records in the 18 months prior to the first Ticket assignment, referred to as the 18-month lookback. The EN may be found ineligible for any/all Phase 1 Milestones 1-4 and SSA will automatically process the denials.
 - If Phase 1 Milestones 1-4 are denied with this exclusion, SSA will check for any additional payments the EN may be due.
 - If not, the EN must request any remaining Phase 1 Milestones prior to requesting Phase 2 Milestones.

Code 43 - INCORRECT PHASE 1 CLAIM MONTH REQUESTED BY EN

- This denial as it relates to P1M1, applies to cases where the EN submits a payment request, but earnings on SSA's records show P1M1 is due at an earlier claim month.
- SSA will deny the case and include the correct claim month in the denial comments. ENs should review the denial comment in the Ticket Portal.
 - Example: "Earlier attainment month payable at (MM/YYYY) per earnings on SSA record or information provided by the EN."
- The EN must resubmit P1M1 using the claim month provided by SSA and must include proof of relationship for the correct claim month.

Proof of Relationship

- ENs must submit a proof of relationship with the Phase 1 Milestone 1 payment request, in addition to meeting all other payment requirements.
- Showing proof of a relationship with your Ticketholder can be accomplished through submitting paystubs or a completed Proof of Relationship (PoR) form that documents a list of intensive employment support services and monthly contact with the Ticketholder during the Phase 1 Milestone period.
- The PoR form must list services and dates of services provided to the Ticketholder during the Milestone period.

ENs will have three opportunities to provide the required proof of relationship for P1M1 before the Ticket is unassigned.



- If an EN did not include documentation with the payment request, SSA will issue a denial (#44) for "Proof of Relationship Not Received." The EN will need to submit P1M1 again and include an acceptable proof of relationship. The EN cannot skip to P1M2.
- If an EN submits documentation, but the documentation did not demonstrate proof of relationship, SSA will issue a denial (#45) for "Proof of Relationship Failed Review." The EN will need to submit P1M1 again and include an acceptable proof of relationship. The EN cannot skip to P1M2.

Phase 1 Milestone Payment Evaluation Summary

- ENs should use the Ticket Portal to check the payment history for each Ticketholder after requesting P1M1.
- ENs will be able to see any/all denials automatically processed by SSA.
- ENs should review all denial comments to determine the next steps.

Phase 1 Milestone Earnings Requirements

Nicole Black (TPM)

Nicole reviewed the eligibility requirements for Phase 1 Milestones 1-4, highlighting the earnings thresholds, look-back rules, and documentation needed for payment consideration. The information below summarizes the specific conditions ENs must meet for each Phase 1 Milestone.

- Phase 1 Milestone 1:
 - The Ticketholder must be in current pay status without entering the Outcome period since the initial Ticket assignment.
 - Ticketholder earnings must be at or above Trial Work Level (TWL).
 - P1M1 can be attained the first month after the Ticket assignment month or any other month thereafter.
 - If the month prior to the initial Ticket assignment month has earnings at or above TWL, Phase 1 Milestone 1 cannot be paid because of look-back earnings.
 - Proof of relationship is required:
 - Paystubs



- Proof of Relationship Form
- Phase 1 Milestone 2:
 - The Ticketholder must be in current pay status without entering the Outcome period since the initial Ticket assignment.
 - The Ticketholder must have 3 months of gross earnings at or above Trial Work Level (TWL).
 - TWL earnings must be 3 months within a 6-month period.
 - If there are 3 months with earnings at or above TWL within 6 months prior to the initial Ticket assignment month, Phase 1 Milestone 2 cannot be paid because of look-back earnings.
 - Proof of relationship is required:
 - Paystubs
 - Proof of Relationship Form
- Phase 1 Milestone 3:
 - The Ticketholder must be in current pay status without entering the Outcome period since the initial Ticket assignment.
 - The Ticketholder must have 6 months of gross earnings at or above Trial Work Level (TWL).
 - TWL earnings must be 6 months within a 12-month period.
 - If there are 6 months with earnings at or above TWL within 12 months prior to the initial Ticket assignment month, Phase 1 Milestone 3 cannot be paid because of look-back earnings.
 - Proof of relationship is required:
 - Paystubs
 - Proof of Relationship Form
- Phase 1 Milestone 4:
 - The Ticketholder must be in current pay status without entering the Outcome period since the initial Ticket assignment.



- The Ticketholder must have 9 months of gross earnings at or above Trial Work Level (TWL).
- TWL earnings must be 9 months within an 18-month period.
- If there are 9 months with earnings at or above TWL within 12 months prior to the initial Ticket assignment month, Phase 1 Milestone 4 cannot be paid because of look-back earnings.

Name Verifications

Nicole Black (TPM)

Nicole provided ENs with the best practices for ensuring that earnings documentation matches the Ticketholder's name on SSA's records and clarified how SSA reviews, verifies, and resolves name discrepancies. Updated verification tools now allow ENs to resubmit earlier denials related to name mismatches.

- Earnings documentation (paystubs, The Work Number, Employer Prepared Earnings Statement) should reflect the name currently on record with Social Security. The EN is not expected to analyze the earnings documentation in detail. Please submit the earnings documentation with the name as-is. Staff will complete the initial review. If the name differs, staff will attempt to verify it with all approved resources. The EN will be notified if the name cannot be verified on SSA's records at the time of processing.
- If a claim was denied because the Ticketholder's name on the earnings documentation did not match SSA's record (before 4/7/2026), please resubmit the claim, as SSA has updated some of the resources for name verification.

Tip: The Ticketholder's name on record is listed in the Ticket Portal.

- The Ticketholder's name on all documentation submitted for payment requests should match the full name on SSA's record.
 - Paystubs
 - Work Number Report
 - Proof of Relationship Form
 - Supplemental Earnings Statement
 - Employer Prepared Earnings Statement



TPM Resources

Phone

- Monday thru Friday 9 a.m. – 5 p.m. ET
- Toll Free: 1-866-949-3687/TTY: 1-866-833-2967
 - Option 1: Beneficiary Help Line
 - Option 2: EN Payments Help Desk
 - Option 3: Systems Help Desk

GovDelivery Messages

- Please save this email address to your safe senders list so that these messages do not go into your spam or junk email boxes: tickettowork@subscriptions.ssa.gov.

Email

- For payment issues: ENPaymentsHelpdesk@ssa.gov
- For questions and issues related to Ticket assignment, the service provider website and the Ticket Portal: ENSystemsHelp@ssa.gov

Payments Topics

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

Questions and Answers

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

Closing Remarks

Ben Lydecker (TPM)

Ben thanked everyone for joining the call.