

## All Employment Network (EN) Payments Call Overview

### Agenda

- Announcements
- E-PAY Status Update
- 18-Month Look Back Tool
- Ticket Program Available Resources
- Ticket Portal Training and Resources
- EN Payments Help Desk
- TPM Phone and Email Resources

### Announcements

- You can check the status of E-PAY by viewing the Announcement screen in the Ticket Portal.
- The Ticket Portal will display the announcement that E-PAY has started and a message when we complete processing an E-PAY file.
- Happy Holidays to everyone: Please be advised offices are closed Monday, December 26 and Monday, January 2, 2017.
- Starting in January 2017, the All EN Payment Calls will be moving to a quarterly schedule. In 2017 our calls will be held:
  - January 31
  - April 25
  - July 25
  - October 31
- The **Ticket Program Available Resources** section of this presentation highlights the service accommodations available to you at any time to reinforce payment principles and get other relevant payment information between calls.

## E-PAY Status Update

- Our current E-PAY file processing began on November 17, 2016.
- Claims are processed by Social Security Number (SSN) instead of DUNS.
- The current E-PAY file contains a little more than 14,000 SSNs.
- As of December 19, 2016 our EN Payments staff processed the following:  
Total claims paid: 12,220

### Reminders:

1. You may submit your payment request through the Ticket Portal instead of waiting for the E-PAY process to run.
2. Please ensure that your Employment Network (EN) Payment contact information is current. We email the EN Payment Contact for payment outreach messages and confirmation of possible split payments.

## 18-Month Look Back Tool

During this segment we will:

- Discuss the 18-Month Look Back Tool (18MLB) and when to apply between the Date of Disability Onset (DDO) and the Ticket Assignment Date (TAD).
- Provide examples to explain the associated processing rules.

### Chart of Timeframes for look back earnings

- The 18MLB rule applies to all Phase 1 Milestone payments for tickets assigned on July 21, 2008 or later.
- If a beneficiary had Trial Work Level (TWL) earnings from work between the DDO and the first TAD, some or all of the Phase 1 Milestones may be excluded from payment.
- If earnings exist the month immediately before the TAD, Phase 1 Milestone 1 is not payable.
- If earnings exist for three months within a six-month period before the TAD and after the latest DDO, Phase 1 Milestone 2 is not payable.
- If earnings exist for six months within a 12-month period before the TAD and after the latest DDO, Phase 1 Milestone 3 is not payable.
- If earnings exist for nine months within an 18-month period before the TAD and after the latest DDO, Phase 1 Milestone 4 is not payable.

**Updated 18MLB tool allows ENs to enter the DDO**

- The DDO is the initial date that Social Security determines the beneficiary to be disabled.
- In some instances, a new DDO is set after a beneficiary is reinstated under an Expedited Reinstatement (EXR) approved by Social Security or if Social Security approves a new disability application.
- If a beneficiary is reinstated under EXR, a new period of disability with a new DDO is set.
- No payments are permitted on the old ticket.
- The updated 18MLB tool now includes the TAD and DDO dates.

**Determining the DDO**

- Benefits Planning Query (BPQY) has a wealth of information about a beneficiary's case.
- ENs can request personal information about the beneficiary by having the ticket holder sign the BPQY consent to release information forms (valid signature required).
  - The first consent form is required to release information from Social Security records.
  - The second consent form is for the release of information associated with IRS earnings records.
  - The release must contain the beneficiary's SSN.
- ENs working with beneficiaries can obtain a new DDO from the beneficiary, especially when Social Security approves an EXR claim.

**New 18-Month Look Back Tool (DDO Feature)**

- The 18MLB (Excel spreadsheet) allows ENs or Ticket Program Manager (TPM) EN Payments staffs to enter a ticket assignment date in the far right column as mm/yyyy.
- The tool then calculates 18 months before the ticket assignment date (month and year) and loads the tool with these months.
- Staff then plugs in "X's" under each month to indicate if earnings were greater than or equal to TWL.
- The spreadsheet will post a 'Yes' or 'No' for each Phase 1 Milestone in the chart below (far left) to indicate whether or not a Phase 1 Milestone payment is available.
- The new 18 MLB tool now has the functionality to enter the DDO and make the calculations. With this new feature, the 18-month period between the DDO and TAD is calculated accurately.
- Instructions on how to use the tool are included in the downloadable form (located at the Ticket to Work program website at <https://yourtickettowork.com> under Information Center > Resource Documents > Tools).

To use the tool:

- First enter the ticket assignment date in the box on the far right outlined in red. This will generate the 18 previous months in the spreadsheet.
- Next enter an X in each of the months where the beneficiary had earnings above the TWL amounts for that year. A chart of TWL amounts is provided on the spreadsheet for your reference.
- When you've entered the appropriate X's, the spreadsheet will display the available milestone payments, based on the rules described earlier.

### **Payment Scenario 1**

During this part of the presentation, I'll be showing you some data and charts associated with the 18 MLB tool and DDO payment scenarios.

The ticket assignment date is applied as November 2015 and the DDO is May 2015. Normally in this case all Phase 1 Milestones would be denied, however only P1M1 and P1M2 are not payable. This is due to the look back ending at the DDO (May 2015).

### **Payment Scenario 2**

The TAD is documented as September 2014 and the DDO is December 2013. The evidence seems to show that P1M1 thru P1M3 is not available for payment because the look back ends at the DDO date.

### **Payment Scenario 3**

- All Phase 1 Milestones are available.
- Each month that contains an X indicates earnings above TWL amount for that year.
- The payments are available because the look back calculation ends at the DDO documented as February 2016.

### **DDO and Ticket 2**

- Please reference and keep in mind these are two different tickets listed with the same beneficiary.
- A DDO exists for each ticket issued.
- It is very important to be aware of the DDO for each issued ticket.
- The DDO on one ticket will differ from the DDO of any subsequent tickets, but the rules remain the same.
- Just remember, the rules apply to individual tickets and not individual SSNs.

**EXAMPLE 1:** Ticket 1 was assigned June 2012 and has a DDO of April 2011. Ticket 1 was terminated February 2015. The beneficiary has earnings from work above TWL from March 2011 to April 2015. Based on the fact that ticket 2 has a DDO date of April 2011 and is outside of the 18-month window, all Phase 1 Milestones are not available.

**EXAMPLE 2:** The DDO for the new ticket (ticket 2) has been taken into account. Ticket 2 was issued June 2015 and assigned July 2015. Although there are earnings listed above TWL for ticket 2, payment is possible due to the new DDO Date of June 2015.

## Ticket Program Available Resources

The Ticket Portal automates many operational functions you do throughout the day.

Besides uploading Payment Requests Forms and viewing the EN Payment Status Report as reviewed previously, some additional automated features that the Ticket Portal offers include:

- checking for ticket assignability
- assigning and un-assigning tickets
- uploading forms

TPM provides website resources for service providers. ENs can also visit the Information Center section of the website for additional information, resource documents and training materials on a wide variety of topics. The Information Center also includes a listing of upcoming events, including conference calls, that service providers can attend. The Training section within the Information Center includes PowerPoint Presentations from past Ticket Training Sessions.

To access the Ticket to Work website, go to <https://yourtickettowork.com>.

## Ticket Portal Training and Resources

The secure Training and Resources site was created to ensure the highest level of security for you and the beneficiaries you serve. You can only access the site by using the link included in the welcome letter you received via email with your login information for the Ticket Portal.

Ticket Portal User Guide:

- A resource to have at your fingertips when using the Ticket Portal
- The reference to consult before contacting us with a question

For New ENs, information on how to access the Training and Resources site was included in the welcome letter you received with confirmation of your completed enrollment in the Ticket Portal.

## EN Payments Help Desk

- The preferred method of tracking the status of submitted payment requests is to use the Ticket Portal and take advantage of the real time updates. If an EN is unable to use the Ticket Portal for any reason, it also has the option to send manual payment status inquiries to the EN Payments Helpdesk at [ENPaymentsHelpDesk@yourtickettowork.com](mailto:ENPaymentsHelpDesk@yourtickettowork.com), or to call the toll-free number 866.949.3687.
- ENs can get clarification on payment-related issues or explanations of how EN Payments staffs apply Ticket program policy and procedures to make payment and payment denial assessments. These duties include:
  - Answer EN payment inquiries received through the Payments Help Desk phone line.
  - Submit requests to the EN Payments staff for payment reconsideration or for Payment Supervisor review of a payment issue.
  - Outreach to ENs to obtain payment-related documentation when EN Payments staff report missing or incomplete information from payment requests ENs submit.

## TPM Phone and Email Resources

### Technical Assistance

- Monday through Friday, 9 a.m.–5 p.m. ET
- Toll Free: 866.949.3687 (TTY: 866.833.2967)
  - Option 2: Payments Help Desk
  - Option 3: Systems Help Desk
- Email:
  - [ENPaymentsHelpDesk@yourtickettowork.com](mailto:ENPaymentsHelpDesk@yourtickettowork.com)
  - [ENSystemsHelp@yourtickettowork.com](mailto:ENSystemsHelp@yourtickettowork.com)

## End of Presentation

As a reminder, TPM provides an opportunity for all ENs to discuss payment-related topics on the last Tuesday of January, April, July and October at 3 p.m. ET during the All EN Payments Call. The full transcripts and audio for the calls are available on the Ticket to Work website under the [Events Archive](#) section. Our next All EN Payment Call is scheduled for Tuesday, January 31, 2017.

This concludes our presentation for today. Thank you all for your attention and participation during the call. Please have a great evening.