

Introductions and Updates

Rob Pfaff (SSA)

Rob Pfaff welcomed everyone to the call and provided the following Social Security updates:

Retirement

Gary Rauch will be retiring next month. Social Security acknowledged Gary's dedication and many contributions to the Ticket to Work Program and will share management structure updates soon.

Gary Rauch shared that he has worked for the Social Security Administration for nearly 35 years including the Pennsylvania Disability Determination system. He thanked everyone for the privilege of working together. September 14 is his last day.

Marketing Proof of Concept transition to a Marketing Pilot

The marketing effort has evolved from the Proof of Concept (POC) phase to the pilot phase. POC initiatives have proven beneficial to the program. The challenge is to determine how to move forward, expand and institutionalize the POCs. POCs will now be referred to as pilots.

About 21 ENs are engaged in the Marketing pilot that is currently underway. ENs share information as they market to beneficiaries. SSA is looking to expand the marketing pilot to additional ENs.

SSA recently received a beneficiary complaint about receiving multiple unwanted marketing calls and reinforced reminder instructions for opting out of the marketing calls.

ENs participating in the marketing pilot must send the beneficiary opt-out list from marketing calls no later than close of business each Friday. ENs should send the opt-out list with each beneficiary's first and last name, state of residence and phone number via the GSO contact mailbox to the addresses for Laurie Armstrong and the Marketing POC. If an EN has not received an opt-out list from SSA, the EN should send a spreadsheet with the requested beneficiary information.

SSA would like to know from ENs what their internal processes are to immediately remove opt-outs from their call lists so that beneficiaries are not burdened with multiple unwanted calls. ENs

should send a description of their internal opt-out beneficiary removal processes to the GSO mailbox addresses for Laurie Armstrong and Marketing POC.

Audience questions and responses are contained in the call transcript and audio.

Wage Reporting Proof of Concept

Melanie Porter (SSA)

SSA distributed communication updates on the wage reporting POC/pilots last month via a GovDelivery message and through the Ticket Connection newsletter.

SSA has received inquiries about how ENs can become engaged in the wage reporting pilot. There is nothing ENs need to do to be part of the wage reporting initiative. During the Proof of Concept phase, SSA engaged up to 30 ENs and monitored wage reporting over time. Wages most likely to result in a beneficiary overpayment (wages high enough to stop cash benefits) became the priority and now will be processed and reported for all ENs.

Moving forward, SSA will automatically enter and flag for timely processing attention any payment request received through the portal with verified wage information that will trigger Phase 2 or Outcomes payments.

Melanie shared that SSA distributed the E-Pay Change FAQ and Technical Bulletins after the July E-Pay Change presentation.

Audience questions and responses are contained in the call transcript and audio.

E-Pay changes

Kimberly Cutler (TPM)

The July 31, 2018 EN Payments Call presentation on E-Pay Changes was reviewed. Additional information related to the questions raised on the July call is included in today's presentation.

How Services and Support Reviews Affect E-Pay

The Ticket Program Agreement (TPA) mandates that ENs provide Services and Supports to beneficiaries in order to qualify for payment. The Services and Supports Review replaces the previous Individual Work Plan (IWP) audit process. The annual review addresses both IWPs and Certification of Services (COS) by random sampling of an EN's assigned Tickets.

The Program Integrity department will send ENs a request to submit an IWP, COS, and any relevant case notes.



The reviews began in September 2017 and All ENs are expected to be reviewed by October 1, 2018.

Effective October 1, 2018, the results of the Services and Support Review will impact E-Pay eligibility based on the following:

- If an EN is found to be non-compliant after a review, the EN will be removed from E-Pay and will have to submit all payment requests via the Ticket Portal.
- After 6 months, the EN can request an additional review to prove compliance.
 - The EN must make the request directly to their EN Specialist.
 - The EN must provide all requested information to show all identified issues have been resolved.
- After the EN is determined to be in compliance, the EN will be eligible for the next E-Pay file.

E-Pay Schedule Change

There will be no E-Pay file until all ENs have completed a Services and Support review. The next E-Pay file will be created in the 4th quarter of 2018. In the meantime, ENs should request payments via the Ticket Portal.

Changes to E-Pay

- Unassigned Tickets will not be included in E-Pay. ENs must request these payments via the Ticket Portal.
- Phase 1 Milestones will no longer be paid via E-Pay.
- Government Trusted Partners (VRENS and WIBs/AJCs) will continue to receive Phase 1 Milestone payments via E-Pay.

Phase 1 Milestone Relationship Requirement (PMRR)

Effective August 1, 2018, all ENs must prove a relationship with the beneficiary in order to receive payment, in addition to having proof of earnings.

- ENs must request Phase 1 Milestones 1-4 via the Ticket Portal.
- ENs can submit either paystubs or COS as proof of a relationship with the beneficiary during the Phase 1 Milestone phase.
- Paystubs are the preferred proof of a relationship. Payment requests that include a paystub will not require additional evaluation.



- Phase 1 Milestone (1-4) payments will continue to use the same policy for determining acceptable evidence of earnings. However, a new verification requirement has been established, the Phase 1 Milestones Relationship Requirement (PMRR), to ensure program payment integrity.
- Paystub proof of earnings does not require proof of a relationship.
- The Work Number proof of earnings requires either paystubs or a COS as proof of a relationship.
- Employer-prepared earning statement as proof of earnings requires either a paystub or a COS as proof of a relationship.
- To Prove Beneficiary/EN relationship:
 - Submit a paystub when requesting a Phase 1 Milestone.
 - If an EN is unable to provide a paystub for any month(s) requested, then a Certification of Services (COS) is required.
 - Even if the earnings are in SSA's records and the Ticket Portal displays the message "Earnings Already Proven," evidence must be provided in the form of a paystub or COS.
 - TPM will adjust the claim month, if necessary, to ensure that these 4 payments are evaluated for the correct attainment month.
 - There are no changes to current policy to determine acceptable evidence of earnings.

TPM provided a decision flow chart to support the above conditions for proof of earnings and proof of a Beneficiary relationship.

Interim Changes: August 1 – October 1

TPM will not assess additional available payments for ENs based on a single payment request. TPM will only process (pay, diary or deny) the claim month submitted.

Example:

- Beneficiary has SGA-level earnings for 1/2017, 2/2017, and 3/2017.
- EN submits payment request for a Phase 2 Milestone for claim month: 1/2017.
- TPM will process the requested claim month of 1/2017.
- EN will have to submit a payment request separately for 2/2017 and 3/2017 in order to receive the additional payments.



- ENs not on E-Pay must submit ALL claims via the Ticket Portal

Effective October 1, 2018:

- ENs excluded from E-Pay must submit claims via the Ticket Portal.
- TPM will only process (pay, diary or deny) the claim month submitted.
- TPM will not assess additional available payments for ENs not eligible for E-Pay.
- If EN submits a claim and requirements are not met for the claim month submitted, TPM will deny the claim and will NOT process payments for any other months that meet payment requirements.

Example:

- EN submits payment request for an Outcome for claim Month: 4/2017, but earnings submitted are below SGA
- SSA Records show the beneficiary has SGA level earnings for 5/2017/ 6/2017 and 7/2017
- The payment request for 4/2017 will be denied due to “Earnings Amounts Do Not Meet Criteria for Payment”.
- TPM will not make additional payments for months where beneficiary has SGA level earnings on SSA records (5/2017, 6/2017, and 7/2017)
- In order to get paid, the EN must request each month via the Ticket Portal

TPM phone and Email resources are available as follows:

Phone

- Monday thru Friday 9 a.m. – 5 p.m. ET
- Toll Free: 866.949.3687/TTY 866.833.2967
 - Option 1: Payments Help Desk
 - Option 2: Systems Help Desk

Email

- For payment issues: enpaymentshelpdesk@yourtickettowor.ssa.gov
- For questions and issues related to Ticket assignment, the service provider website and the Ticket Portal: ensystemshelp@yourtickettowork.ssa.gov



Concluding Question and Answer period

Final Q & A will be available at <https://yourtickettowork.ssa.gov/web/ttw/events-archive>.

Additional Details

The full transcript and audio from the Quarterly All-EN Call will be available at <https://yourtickettowork.ssa.gov/web/ttw/events-archive>.

