

Welcome

Kimberly Cutler welcomed everyone to the first quarterly All Employment Network (EN) Payments Call for 2020. She shared the following agenda topics:

- Announcements
- End-of-Year Statistics
- 2020 TWL/SGA/Blind SGA Amounts
- VREN Ticket Assignability
- Phase 1 Milestone Eligibility with Successful SVR Closure
- New 18-Month Look Back Tool
- Resources
- Questions and Answers Forum

Announcements

Kimberly Cutler shared the following announcements:

- SSA sent out a GovDelivery message on January 13 regarding the due date for completing Security Awareness Training Certification using form SSA – 222.
- All EN staff are required to complete the Security Awareness training by February 28, 2020.
- ENs will need to sign and submit the Addendum electronically.
- Use the following link for additional information on completing this form and general submission guidelines:
yourtickettowork.ssa.gov/resources/resource-documents.html
- ENs should download **2020 Completing Security Awareness using an Electronic Signature – Presentation** under the **Program Resources** header.

End-of-Year Statistics

Kimberly provided the following End-of-Year 2019 Statistics:

- **Total dollars paid:** \$92,953,933
- **Total denials:** 59,073
 - **Most common denial reason:** Beneficiary Receiving Federal Cash Benefits (code 02). Kimberly explained the denial code 02 is used when an EN submitted a claim for Outcome payment but SSA records show the beneficiary is in current pay status (receiving a Federal cash benefit).

Therefore, TPM will use this code to deny the claim.

- **Total payments:** 155,121
- **Split Payment with dollars paid:** \$5,157

ePay Reminders

Kimberly provided the following ePay reminders:

- Notification when the ePay file starts will be posted in the Portal. Processing will probably start in the next week or so.
- ENs can still submit payments requests through the EN Ticket Portal rather than waiting on ePay.
- Phase I Milestones are not paid through ePay. ENs must request payment for Phase 1 Milestones through the EN Ticket Portal.
- Unassigned Tickets are not included on the ePay file.
- ENs must have passed their Annual Service and Supports Review to be eligible for ePay.

2020 Trial Work Level / Substantial Gainful Activity Levels

Kimberly provided the new Trial Work Level (TWL) and Substantial Gainful Activity (SGA) levels for 2020:

- TWL: \$910.00 (\$30.00 increase from 2019)
- SGA: \$1260.00 (\$40.00 increase from 2019)
- Blind SGA: \$2,110.00 (\$70.00 increase from 2019)
- TPM will provide the 2020 Ticket Payment rates as soon as they are available

VREN Ticket Assignability

Kimberly stated that SSA sent out a GovDelivery message with the following clarifications to the VREN Ticket Assignment policy on November 19:

- SSA will only pay a State VR agency under one payment system per beneficiary
 - A State VR agency cannot assign the Ticket when they previously served the beneficiary under cost reimbursement and were paid under cost reimbursement
 - If the State VR agency closes a cost reimbursement case for which they were not paid and subsequently opens a Ticket program case on the same person, the Ticket case must be based on a new Individual Plan for

Employment (IPE) date, which cannot be retroactive to cover the previous period of VR

- **Policy Exceptions:** A State VR agency may open a Ticket assignment case on a beneficiary previously served under cost reimbursement if:
 - No cost reimbursement payment was made on behalf of the beneficiary since January 1, 2002; or
 - Cost reimbursement was made since January 1, 2002, but not under the current Ticket (i.e., the beneficiary was issued a second Ticket based on a new period of disability)

VREN Ticket Assignability Scenarios

Kimberly provided some scenarios:

- State VR agency acting as an EN (VREN) served the beneficiary under the Cost Reimbursement (CR) payment method and a Cost Reimbursement payment was made to the State VR agency after January 1, 2002 on the current Ticket.
 - Same VREN **cannot** assign the Ticket under the EN Payment method
- VREN served the beneficiary under the CR payment method and no CR payment was made to the State VR agency after January 1, 2002.
 - Same VREN **can** assign the Ticket under EN Payments method with a new IPE
- VREN served the beneficiary under the CR payment method and a CR payment was made to the VREN after January 1, 2002, under a prior Ticket
 - Same VREN can assign the Ticket under the EN payment method because a new Ticket was issued due to a new period of disability

Phase One Milestone Eligibility with Successful Closure

Kimberly informed the ENs of the following policy changes to the Phase One Milestones payment with VR involvement:

- TPM will use the 18-month look-back period to identify if any VRs closed their claim successfully (i.e. successful closure) for the beneficiary in question, prior to Ticket assignment, to determine initial eligibility for Phase 1 Milestone payments.
- **If a successful closure is found during the 18-month look-back period**, the EN is **not** eligible for Phase 1 Milestone payments
- **If no successful closure is found during the 18-month look-back period**, the EN **may be** eligible for Phase 1 Milestone payments

- If a VR successfully closed a case **more than 18 months** prior to Ticket assignment date, the rule is to do a normal look back for TWL earnings to check the eligibility Phase 1 Milestone payment
- This policy applies to all payments submitted on and after February 1, 2020

New 18 Month Look-Back Tool

Kimberly presented the new 18-Month Look-Back tool, which is similar to the previous one. However, the new tool has a new column: **Enter the Most Recent Date of Successful VR Closure in the Red Box Below (MM/YYYY)**

| 18-Month Look Back Tool | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--------|--------|--------|---------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---|--|--|
| EN Name: | | | | Beneficiary's Name: | | | | | | | | | | | | | | | | |
| DUNS: | | | | SSN: | | | | | | | | | | | | | | | | |
| MILESTONE 4 | | | | | | | | | | | | | | | | | | Enter Ticket Assignment Date in Red Box Below MM/YYYY | Enter Date of Disability Onset in Red Box Below MM/YYYY | Enter Most Recent Date of Successful VR Case Closure in Red Box Below MM/YYYY |
| MILESTONE 3 | | | | | | | | | | | | | | | | | | | | |
| MILESTONE 2 | | | | | | | | | | | | | | | | | | | | |
| MILESTONE 1 | | | | | | | | | | | | | | | | | | | | |
| Jul-18 | Aug-18 | Sep-18 | Oct-18 | Nov-18 | Dec-18 | Jan-19 | Feb-19 | Mar-19 | Apr-19 | May-19 | Jun-19 | Jul-19 | Aug-19 | Sep-19 | Oct-19 | Nov-19 | Dec-19 | Jan-20 | Nov-14 | |
| | | | | | | | | | | | | | | | | | | Enter an X below each month with earnings above the Trial Work amount for that year | | |

- Enter the Ticket Assignment Date, Date of Disability Onset, if available, and the most recent date of successful SVR closure.
 - Make sure to use the format provided MM/YYYY (i.e. 01/2020)
- For cases closed by a State VR agency after January 1, 2002:
 - If the successful closure was within 18 months prior to Ticket assignment date, Phase 1 Milestones are not available
 - If the Ticket Portal contains multiple successful closures, use the most recent successful closure date
 - Example 1:
Ticket Assignment Date (TAD) January 2020. The Date of Disability Onset (DDO) is November 2014, and the date of most recent successful VR closure, August 2018.
 - All the green colored boxes for P1M1 through P1M4 turned red, indicating the most recent successful VR closure is within 18-months prior to the Ticket assignment date, therefore Phase 1 milestones are not available.

| 18-Month Look Back Tool | | | | | | | | | | | | | | | | Enter Ticket Assignment Date in Red Box Below MM/YYYY | Enter Date of Disability Onset in Red Box Below MM/YYYY | Enter Most Recent Date of Successful VR Case Closure in Red Box Below MM/YYYY | | |
|---|--------|--------|--------|--------|--------|-------------|--------|--------|--------|--------|--------|-------------|--------|--------|--------|--|--|--|-------------|--------|
| MILESTONE 4 | | | | | | MILESTONE 3 | | | | | | MILESTONE 2 | | | | | | | MILESTONE 1 | |
| Jul-18 | Aug-18 | Sep-18 | Oct-18 | Nov-18 | Dec-18 | Jan-19 | Feb-19 | Mar-19 | Apr-19 | May-19 | Jun-19 | Jul-19 | Aug-19 | Sep-19 | Oct-19 | Nov-19 | Dec-19 | Jan-20 | Nov-14 | Aug-18 |
| | | | | | | | | | | | | | | | | | | | | |
| Enter an X below each month with earnings above the Trial Work amount for that year | | | | | | | | | | | | | | | | | | | | |

- Example 2:**
 Ticket Assignment Date of January 2020. The Date of Disability Onset, November 2014, the most recent successful VR closure date is June 2018. The green colored boxes stay green, indicating the most recent successful VR closure was not within 18 months prior to the Ticket assignment date. Therefore, Phase 1 Milestones payments are available to the EN if all other payment criteria are met.

| 18-Month Look Back Tool | | | | | | | | | | | | | | | | Enter Ticket Assignment Date in Red Box Below MM/YYYY | Enter Date of Disability Onset in Red Box Below MM/YYYY | Enter Most Recent Date of Successful VR Case Closure in Red Box Below MM/YYYY | | |
|---|--------|--------|--------|--------|--------|-------------|--------|--------|--------|--------|--------|-------------|--------|--------|--------|--|--|--|-------------|--------|
| MILESTONE 4 | | | | | | MILESTONE 3 | | | | | | MILESTONE 2 | | | | | | | MILESTONE 1 | |
| Jul-18 | Aug-18 | Sep-18 | Oct-18 | Nov-18 | Dec-18 | Jan-19 | Feb-19 | Mar-19 | Apr-19 | May-19 | Jun-19 | Jul-19 | Aug-19 | Sep-19 | Oct-19 | Nov-19 | Dec-19 | Jan-20 | Nov-14 | Jun-18 |
| | | | | | | | | | | | | | | | | | | | | |
| Enter an X below each month with earnings above the Trial Work amount for that year | | | | | | | | | | | | | | | | | | | | |

- Example 3:**
 If the Successful VR closure is not within the 18 months prior to the Ticket assignment date, then Phase 1 Milestone 1 through 4 boxes will remain green. However, you will need to complete the tool to determine availability of Phase 1 Milestones based on the prior earnings. As earnings are entered, the tool will still update to display Milestone availability based on 18-month look-back earnings exclusions.

| 18-Month Look Back Tool | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--------|--------|--------|--------|--------|---------------------|--------|--------|--------|--------|--------|-------------|--------|--------|--------|--------|--------|---|--------|--|--|--|--|--|--|
| EN Name: | | | | | | Beneficiary's Name: | | | | | | | | | | | | Enter Ticket Assignment Date in Red Box Below MM/YYYY | | Enter Date of Disability Onset in Red Box Below MM/YYYY | | Enter Most Recent Date of Successful VR Case Closure in Red Box Below MM/YYYY | | | |
| DUNS: | | | | | | SSN: | | | | | | | | | | | | | | | | | | | |
| MILESTONE 4 | | | | | | | | | | | | MILESTONE 3 | | | | | | MILESTONE 2 | | | | MILESTONE 1 | | | |
| Jul-18 | Aug-18 | Sep-18 | Oct-18 | Nov-18 | Dec-18 | Jan-19 | Feb-19 | Mar-19 | Apr-19 | May-19 | Jun-19 | Jul-19 | Aug-19 | Sep-19 | Oct-19 | Nov-19 | Dec-19 | Jan-20 | Nov-14 | Jun-18 | | | | | |
| X | X | X | X | | | | | | | | | X | X | X | X | X | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | Enter an X below each month with earnings above the Trial Work amount for that year | | | | | | | |

TPM Resources

Kimberly provided information on how to access the resources available on the Ticket to Work website related to the agenda topics and different options to contact the Helpdesk:

- 2020 Completing Security Awareness using an Electronic Signature – Presentation
yourtickettowork.ssa.gov/resources/resource-documents.html
- 18-Month Look-Back Tool
- Phone
 - Monday thru Friday 9 a.m. – 5 p.m. ET
 - Toll Free: 1-866.949.3687 / TTY: 1-866.833.2967
 - Option 1: Payments Help Desk
 - Option 2: Systems Help Desk
yourtickettowork.ssa.gov/resources/resource-documents.html
- Email
 - For payment issues: enpaymentshelpdesk@yourtickettowork.ssa.gov
 - For questions and issues related to Ticket assignment, the service provider website and the Ticket Portal: ensystemshelp@yourtickettowork.ssa.gov

Questions and Answers

Q: I have a question about the state agencies and if they will receive training on the Tickets that are usually done by individual counselors and multiple area offices. We often find that the Tickets are not closed and we have to go in and request. My concern is that people may have Tickets not closed at the state VR agency for some time before they go to the EN for help. The date of the state VR closure could be at the local office for months or even a year if the Ticket was never closed. So who is tracking to make sure that these Tickets are closed in a timely manner?

My recommendation to whoever would be the state VR liaison that they reach out to the state VR.

A: I'm not aware of any specific training that the VRs will receive but I know they are aware of the need for timely submission of closures.

I understand and thank you for that recommendation and I will make sure that I note that.

Q: How does SSA count earnings if pay periods lead into the next month? Example, pay period from January 27 through February 3.

A: To answer the question, the system is such an amazing thing that it actually does the calculation for us. That is not a manual process. When we have the pay period like the one you gave, the system will automatically break it down and show the specific amount that goes to each month. That is an automated process. It used to be a manual process and we would have to figure it out. I will spare you the details of that. But the system automatically calculates it out to make it much easier for processing and also to show a true account of the earnings earned in each month.

Q: I know that in order to submit payments for SSDI the work earnings have to be earned during the month. My understanding has always been the dates on the documents on the Ticket to Work website — that whether it is earned during that month is based on the pay period end date. I was denied for payment recently because it said it was not earned during the month, even though the pay period ended that month, so I wanted clarification on that.

A: What you submitted shows that it was earned in the month at least at Trial Work Level (TWL). The pay period may have started and ended in the same month.

Q: Does it have to start and end in that month for it to count? It says on the payments checklist that the amount earned must be earned within the month to determine the amount. So has that changed?

A: For SSDI clients, the account of earnings goes from the first day of the month to the last day of the month. Any wages earned during the first of the month to the last day of the month counts. If the start day on the pay stub is the 27th of the month and ends on the 4th of the next month, the system calculates earnings earned during the month from the first day to the last day. If you have a specific case that you believe was denied incorrectly, please reach out to the Helpdesk to review and see if we need to look at it again.

Q: I have reached out to the payments desk already. In this case, the pay period began like October 20, and it ended November 2. How does that get counted toward the month?

A: Well, the 20th through the 31st of October counts for the month of October and then the 1st and 2nd would count toward November. So in the 14-day period, 12 of the 14 days would count toward October and the last 2 days toward November.

Q: I recently had a problem with a request with the pay date on the paystub that had been modified by the EN because the system was not accepting that pay date. Is that how earnings will be processed? Is that a policy of modifying a pay date showing on paystub because the system will not accept it?

A: No. We do not modify any documents submitted. If the EN sends documentation and we are unable to read the information, we will outreach to the EN and request to submit a Supplemental Earnings Statement or to resubmit the information. Under no circumstances do we modify any type of documentation sent in by our service providers.

Q: How long should the EN wait before submitting the payment request while awaiting payment on recent payment requests?

A: There is no time frame in submitting the payment. So if you submitted a payment request for Phase 1 Milestone today and you have the earnings for Phase 1 Milestone 2 you can submit. There's no time frame, but please remember that all payment requests are processed within 30 days of receipt. But there is no time frame as to when you have to submit payment. I would encourage that as soon as the beneficiary meets the requirement, you submit for payment. But remember, when submitting a payment request, you have to make sure the attainment month has passed. For example, if you're working with the beneficiary and on January 15 earnings reach the trial work level, you have to wait until that claim month ends before you submit for payment. If the Beneficiary earns the money in January, you have to wait until February to submit for January claim month.

Q: Which month is the appropriate month to submit Phase 1 Milestone 2 for a Title 16 beneficiary if Phase 1 Milestone 1 was achieved in August but billed in September?

A: I would ask you to refer to the Payment-at-a Glance chart, which provides what is needed to satisfy your payments. If you received Phase 1 Milestone 1 in August, remember -- the requirement to receive Phase 1 Milestone 2 is three months of Trial Work Level (TWL) earnings within 6 months. You can use August and you would need two more

months at TWL. Make sure you're referencing the Payments-at-a Glance so that you will know the requirements for Phase 1 Milestones, Phase 2 Milestones and Outcome.

Q: First off, kudos to SSA for passing the new rule on the 18-month look back on the closure. I have been asking for that for years and you've done it, so this is a big day. Hardy high five and kudos. Applause on that and thank you. It is a happy day. I have three questions and two are really simple. First of all, on the Security Awareness Training, it would be great if we got notification of receipt. I could get it in before the 28 but if it's not received somehow or falls through the cracks, then I am suffering serious problems even if the problem was on the end of SSA. So can we get notification that it was received?

A: We do send out the receipt. You will receive that when you submit the Security Awareness form. We asked that you allow three days for processing but we will notify you of receipt.