

## Welcome

Kimberly Cutler welcomed everyone to the call. She shared updates on the next ePay file, TPM changing the payment type, prior earnings denials, and the differences between the EN Certification of Services (COS) form and the Proof of Relationship (PoR) form. Kimberly also provided different resources that are available to service providers.

## Announcements

1. Kimberly announced that under the New Ticket Program Agreement (TPA), Employment Networks (EN) must sign and submit the Request for Application (RFA) with required documentation by October 28, 2020. Information should be submitted to: [TPAHELP@SSA.GOV](mailto:TPAHELP@SSA.GOV). ENs can also use this email for any questions. Failure to submit the signed RFA with the required information could result in the termination of the EN's contract.
2. SSA announced the following change to the 24-month aged claim policy: Effective November 1, 2020, ENs will be able to receive payments for claim months back to a fixed date of April 2018. This temporary policy change is to make it possible for ENs to receive payment for claim months that might have been affected by the COVID-19 pandemic. ENs with any questions about this policy change should contact the EN Payments Help Desk.

## ePay File

The Ticket Program Manager (TPM) will start processing the next ePay file soon. Following are some reminders:

1. The ePay file is processed in order of SSN, not DUNS number.
2. ENs must have passed their annual Services and Supports Review.

## Changing Payment Type

Kimberly provided the following information regarding TPM changing payment type:

- When ENs submit for Phase 2 Milestones and the earnings are at least at Substantial Gainful Activity (SGA) but the benefit status in the SSA's database is in suspense due to work and earnings, TPM will do the following as long as all payment criteria is met:

- Deny the claim submitted by the EN. Denial reason: Outcome Period Entered – Milestones can't be paid.
- Recreate a new claim as Outcome and make the payment.

## Phase 2 Milestones and the Outcome Period

- The Outcome Period begins when the first month of Federal disability benefits are no longer payable due to work or earnings.
- Once a Ticket has entered the Outcome period, no further Milestone payments can be made from the start of the Outcome period onward. Any unpaid Milestone months might be payable in the future as part of a Reconciliation payment after Outcome payment 12.
- Once the Ticket goes into the Outcome period, even if the benefits update or revert back to current pay (beneficiary starts receiving cash benefit again), the EN will not be eligible to receive Milestone payments because the Outcome period was entered.

## Prior Earnings

Kimberly mentioned that TPM sees a lot of denials happening because of prior earnings and made the following recommendations:

- ENs should research prior work history to see if the beneficiary had Trial Work Level (TWL) earnings within 18 months prior to Ticket assignment date. Some or all Milestone payments may not be allowed if the beneficiary had TWL earnings within the 18 months prior to the Ticket assignment date.
- Many EN overpayments are due to prior earnings postings after the Phase 1 Milestone payment has been made. ENs should try and get as much prior work history as they can before submitting for the first payment.
- Resources to help ENs identify prior earnings include:
  - Benefits Planning Query (BPQY) – SSA form 3288: Beneficiary requests from SSA Local Office. This is a consent for release of information that has been signed by the beneficiary. Make sure the SSA 3288 form is signed by the beneficiary. There are two SSA 3288 forms. The first form authorizes the release of Social Security records. The second form authorizes the release of Internal Revenue Service earnings records.

- For more information about BPQYs, please visit <https://www.ssa.gov/redbook/eng/resources-supports.htm>
- Pay Stubs and Employer Prepared Earnings Statements – ENs can request previous pay stubs from the beneficiary or Employer Prepared Earnings Statement directly from the employer.
  - ENs should request this information as part of the intake process or during follow-up consultation once the Ticket is assigned.
- The Work Number – User paid verification of employment. The information from The Work Number uses employer's payroll data, which is typically updated each pay period and ENs can use The Work Number as a verified earnings source when requesting payments.
  - **Note:** SSA may still have additional payment data.

## EN Certification of Services (COS) Form vs. Proof of Relationship (PoR) Form

Kimberly discussed the EN Certification of Services form vs. the Proof of Relationship and which form is used by TPM.

- COS – Used when requesting payment for beneficiary who unassigned their Ticket. ENs must submit a detailed list of services provided to the beneficiary throughout the duration of Ticket assignment. Services should be documented on the COS form and submitted with the payment request.
- PoR – ENs must provide proof of relationship when requesting payments for Phase 1 Milestones 1-3 in addition to providing proof of earnings from: The Work Number, Employer Prepared Earnings Statements, or Earnings Already Proven in SSA database.
- Proof of Relationship is determined by:
  - Pay Stubs **OR**
  - A completed PoR form with a list of services provided to the beneficiary during the requested Milestone period.

## TPM Resources

- Ticket Program forms are available at <https://yourtickettowork.ssa.gov/resources/forms.html>
- Phone
  - Monday thru Friday 9 a.m. – 5 p.m. ET
  - Toll Free: 866.949.3687 / TTY: 866.833.2967
    - Option 1: Beneficiary Help Desk; Option 2: Payments Help Desk; Option 3: Systems Help Desk
- Email
  - For payment issues: [enpaymentshelpdesk@yourtickettowork.ssa.gov](mailto:enpaymentshelpdesk@yourtickettowork.ssa.gov)
  - For questions and issues related to Ticket assignment, the Service Provider website and the Ticket Portal: [ensystemshelp@yourtickettowork.ssa.gov](mailto:ensystemshelp@yourtickettowork.ssa.gov)

## Questions and Answers

**Q: Beneficiary has reported earnings to their local SSA Field Office. Should I submit pay stubs with my payment request?**

A: Yes. ENs should submit pay stubs with their payment request to be entered into SSA's database.

**Q: With the temporary suspension of the 24-month Aged Claim rule, can we resubmit for claim months that were previously denied?**

A: No. Claims that were denied due to "Aged Claim" should not be resubmitted. Only new claims submitted after the November 1, 2020, date will apply to the temporary policy change for the 24-month Aged Claim rule.

**Q: Are Workforce ENs still exempt from needing to submit pay stubs for Phase 1 Milestones payment under the new TPA?**

A: Yes. Nothing has changed for Workforce ENs. Workforce ENs receive payments via ePay.

**Q: When does the current TPA expire?**

A: The current TPA expires on October 28, 2020. If an EN does not submit the signed TPA with required documentation, by October 28, 2020, they are subject to termination.



**Q: ePay: If an Outcome payment was denied for being in current pay, does the EN have to submit for payment?**

A: The next ePay file will begin soon. TPM staff will review all SSNs to see if payments can be paid based on benefits status and earnings.

**Q: If an EN unassigns a Ticket, can they receive payments via ePay?**

A: Unassigned Tickets are not included on ePay files. ENs can submit for payments up to the month prior to Ticket unassignment.

**Q: Are Already Proven earnings and verified earnings the same?**

A: Yes.

**Q: How many SSNs does an EN need to be eligible for ePay?**

A: There is no minimum number of SSNs required to be on ePay. ENs must not be on Hold and have passed their annual Services and Supports review. Phase 1 Milestones are not included on ePay.