

Operator: Good day and welcome to the Quarterly All EN Payments Call. Today's conference is being recorded. At this time, I turn the conference over to Kimberly Cutler. Please go ahead.

Kimberly Cutler: Thank you. Good afternoon everyone and thank you all so very much for joining our first Quarterly All EN Payments Call of 2021. I am Kimberly Cutler, the EN payments manager and the host of today's call.

The purpose of today's presentation is to provide insight into the payment process on the following agenda topics. So today, we will cover the — I will provide the end of year stats, the ePay file stats. I will provide the 2021 trial work level and SGA amounts and we will also discuss the temporary 24-month aged claim rule.

And as we do in all calls, we will make sure that you have available resources. And after we've concluded the presentation part of today's call, we will move into the question-and-answer part.

So we will go ahead and get started with our first agenda item which we're going to go over the end of year stats.

So for the year ending 2020, over \$90 million cleared treasury last year. And SSA and TPM staff processed a little over 142,000 payments. We did have a little over 68,000 claims that were denied in — during the year of 2020.

As you can see, we did not identify any split payments last year and we did have - we wanted to note the most common denial reason and you guys will see it as 02 code and that is beneficiary receiving federal cash benefits. So that was the highest denial or the reason or they had the most denial reasons during the year.

And that code actually indicates that the EN has submitted a claim for an Outcome payment and the beneficiary is listed in current pay status in Social Security's records. So as we all may know, in order to receive an Outcome payment, a beneficiary must be in a suspense or non-payment or non-pay payment status due to work in earnings.

So we do see a lot of cases that were denied using this or for this particular reason. So we just wanted to note for the year 2020 what the most common denial reasons or reason was.

And moving on to our next slide. Here, we have the ePay file stats. So we did process a couple of ePay files during the year of 2020 but the last ePay file, we started —TPM

started processing in October and we actually completed this file on the 31st of December. And from that file, we did pay over — there were 12,905 claims processed and we did process, or we did pay a little over 3,700 SSNs.

So the grand total that was paid based off of process and claims from the ePay file was a little over \$6 million. And so - and just remembering, we do process the — ePay file does consist of SSNs, and again, just wanted you guys to see what date or what number, what process, what we processed, what was paid and the number of SSNs that was processed from that last ePay file that we processed.

We are expecting to receive the next ePay file shortly. As we always do, we will — there will be notification in the Ticket portal when we actually start processing the next ePay file and we're expecting to get that file soon and we will start processing.

The next agenda item we wanted to share, we're in a new year so we also have — now, we have new trial work level and substantial gainful activity amounts.

So the 2021 trial work level amount is \$940 a month. This is a \$30 increase from the 2020 level. The SGA amount, the new SGA level is for non-blind beneficiaries, excuse me, for non-blind beneficiaries is \$1,310 a month which is a \$50 increase from the SGA amount for 2020.

Now, for the blind SGA amount, that is \$2,190 a month. That is an \$80 increase compared to 2020. So again, we're in a new year and so we do have new trial work level and substantial gainful activity amounts.

Now, TPM, we are in the process of updating the Payments at a Glance and the Payments at a Glance will display the 2021 Ticket to Work payment rates. And we are updating that, and that information will post to the Ticket to Work website soon. As soon as we have that information posted, we will send out a GovDelivery message letting all service providers know that that information is there.

So again, what we're providing today are the trial work level and substantial gainful activity amounts. But you — I know a lot of ENs are waiting on the payment rates and that

information will be posted to the website soon and we will send out notification letting everyone know once they are posted to the Ticket to Work website.

Okay. So what we wanted to talk about was the temporary 24-month aged claim rule. So SSA sent a GovDelivery message out to Employment Networks and a Vocational Rehabilitation Agencies acting as ENs or VRENS. They sent out this message on October

27, 2020 announcing the EN payment temporary policy change suspending the 24-month aged clean rule from November 1, 2020 to May 1, 2021.

So we did send that out but we wanted to provide some clarification regarding this temporary 24-month aged claim rule. So this ruling, and please make note, this rule only applies to Outcome payments that were previously denied before November 1, 2020, right. And this - it applies because the field offices were not performing cessations due to the COVID-19 pandemic.

So I just wanted to stress that so for the clarification that the temporary change which allows TPM and SSA to go back and process claims as old as April 2018, that only applies to Outcome payments. And so ENs must still request Phase 1 Milestones and Phase 2 Milestones no later than 24 months following the month the Ticketholder's work and earnings meet the criteria for Social Security to make a payment.

So again, I know we sent that the — SSA sent the message out in October but today, we just wanted everyone to be clear and understand the point, if you will, of the policy. So it only applies to Outcome payments because the Outcome payments were the only payments that were affected when the field officers were not performing ((inaudible)) because Outcome payments as you know, the beneficiary must be in a suspense or non-pay status due to work or earnings.

So the — when the COVID-19 pandemic interrupted that process, so it interrupted the field officers being able to process those cases so that is why the temporary 24-month aged claim rule went into effect was to allow the ENs that missed out on those payments due to the to the COVID-19 pandemic. SSA wanted to make sure that those ENs could receive those Outcome payments.

So therefore, it only applies to those payments but the same — the rule that we had before for the aged claim rule still applies to Phase 1 Milestones and Phase 2 Milestones. So please make sure that you are submitting those requests no later than 24 months following the month the beneficiary reaches the criteria for payment, right.

And this went into — the effect — the temporary 24-month aged claim rule went into effect November 1. So this is why we're saying that the rule applies to those Outcome payments that were denied prior to that.

So please just make sure you're mindful when you're requesting your payments so that if you do see a denial for a Phase 1 Milestone or Phase 2 Milestone due to the aged claim rule that is because the - we did not receive the request within that 24-month window. So

please make sure you make a note that the rule only applies to the Outcome payments.

Okay. And then the final slide that we have, as usual, we want to make sure that everyone's aware of the different options, the different resources that that you guys may have regarding payment issues or Ticket assignment or questions about the portal. Please make sure that you keep this somewhere handy so that you have it as a reference when you need to reach out to Ticket Program Manager for any reason.

Now, I know like probably the first time since I've been doing the call that that was a very - it wasn't as a heavy presentation as we were normally used to for payments, but we wanted to again provide you with the information from the previous year, make sure you have the TWL and SGA amounts for the current year and definitely wanted to provide clarification on the temporary 24-month aged claim rule.

So that concludes the presentation part, right, but we now want to open the line for questions. And I would like for everyone to be mindful that if you have questions that are related to very specific SSNs or a very specific case, we do encourage you to reach out to the EN Payments Help Desk.

And again, on a previous slide, you can actually see the contact number for contact and the help desk but we want to make sure that all of your questions are answered. It's just that sometimes, if you have a very — a question about a specific SSN or denial or a case, we may not be able to answer that in this format because we don't have all the details of the case.

And so we don't — when it's — when it's when it's specific to a certain SSN, we don't want to give a generalized answer. We want to make sure that you — we have the details of the case. So if you have something of — questions about a case that was denied previously, please make sure that you're reaching out and using the resources at the EN Payments Help Desk, okay.

So at this point, (David), if you don't mind, I would like for us to kind of tag team as we've done in the past. I would like to take a few calls starting from the phone lines and then we will also take a few questions from the chat. So (David)...

Operator: Absolutely.

Kimberly Cutler: ...if you wouldn't mind.

Operator: Sure. Ladies and gentlemen, to ask a question over the phone, please press Star 1 on your telephone keypad. If you're using a speakerphone, please be sure your mute function is turned off to allow your signal to reach our equipment. Once again, press Star 1 to ask a question via the phone and we'll pause for a moment to assemble the queue.

And we do have a question that just came through. From James Carey with Research Foundation for Mental Hygiene.

James Carey: Hi. I'm from Albany, New York Research Foundation and we've been filing requesting payments, Phase 1 payments for a while using wage data that we have available to us on a quarterly basis. And it's been working fine up until like the last quarter. Let's say, December of 2020 in early January, we've been getting a huge number of denials because it says the wage data isn't substantiated.

And I'm just wondering if there's any change to when you get the wage data. Are you getting the wage data? Is there a delay in your process that's causing all these denials?

Kimberly Cutler: No. Again, that might be a very specific denial but I don't know of any changes. So you've — in the past, you've submitted payment requests for Phase 1 Milestone 1 using — I'm sorry, what were you submitting as your evidence of earnings?

James Carey: We have wage data that's provided to us by our tax department here in New York State rather than — so we don't provide documentation, we just have a file that's given to us that says these are the wages for the quarter by SSN.

Kimberly Cutler: Okay.

James Carey: And that seems to have worked fine up until now, up until December, but now, we're getting a lot of denials and we're wondering if there's just a lag, maybe we have the wage data before you do. So we're aware that they've earned above trial work

level for a month and that you're not aware of it yet. But, again, this is a — seems to be a huge increase when you think of denials.

If we can follow up individually if you don't know anything generic that's causing the problem.

Kimberly Cutler: Right. I would have to — because I would need to see what you're actually submitting and look at the cases that were paid before using this information because if it's — of course, obviously before it was acceptable evidence of earnings so I would need to see that but if you — if you I do know that if we do not have earnings information in SSA database but if ENs submit approved evidence of earnings, we do enter that information and payments can be made based on that but it would have to be approved.

And again, I would need to look at that. So if you could just...

James Carey: Okay.

Kimberly Cutler: I'll make sure that Adelle provides my contact information in the chat and we need to look at those cases individually or contact the help desk and you get a quicker response. So let them just kind of look at...

James Carey: Good. And just a follow-up question related to that. Sometimes when we submit through the portal a payment, we'll — it'll get denied and it'll say insufficient wages and that we have the support — provide documentation.

But the ones, the denials I'm talking about are accepted at the time we put them into the portal. There's no denial of that time. But then after the fact, we get notified that the wage data isn't sufficient to justify the payment. Is that something that's changed or do you know why sometimes it's denied on the spot and other times, it's only after the fact?

Kimberly Cutler: I do not, because once it comes to the portal, I don't know if (Katie) has any information about that. But for us, we just process it as it comes in. It's real time. So

I'm not sure.

Again, I would really need to look at it or have someone from the help — payments help just look at the individual cases.

James Carey: All right.

Kimberly Cutler: So those are the kinds that you have to go when you get the details.

James Carey: All right. ((Inaudible)) to the help desk?

Kimberly Cutler: I'm sorry?

James Carey: Just submit that information to the help desk then? Work with the help desk on that?

Kimberly Cutler: Yes. Yes, please...

James Carey: Okay.

Kimberly Cutler: ...and then we'll get that information back to you.

James Carey: Great. Thank you.

Operator: Okay. And we do have another question. As a reminder, it is star 1 if you have a question.

Next, we'll go to (Hamid), a (GVN) with HH Employment training for the hard of hearing.

(Hamid): Okay. Yes, hello. I have two things. First is TWL for both blind and other disabilities and the 904, is that the same for the TWL? Is that the same for both blind?

Kimberly Cutler: Yes.

(Hamid): As well as other disabilities?

Kimberly Cutler: It's the same. So the trial work level is the same for blind and non-blind. The only difference in the amounts would be substantial gainful activity or the SGA amount.

(Hamid): Right. Okay. Okay. Okay. The second question I want to ask is often, I'm concerned because the blind SGA is high 2,190, and I have one or one or two times I've seen deaf and blind contacting me for help with the job search.

In the back of my mind, I see the SGA is high and I feel like it's avoiding providing services to the blind person because the SGA is so high and I think that's kind of a sad situation. Is that the right perspective? Because the blind SGA is so high, it's hard to get a job with that high of a pay?

So often I feel bad because I can't provide services to the blind folks because it's hard — it's hard to get a job because they're well above that 2,000 a month. So that was another question.

Kimberly Cutler: Okay. I'm not sure I understood the question. I understand you're — like you said, you were — that you have some concern with it but I'm sorry, could you repeat the question that you have?

(Hamid): Well...

(Crosstalk)

Operator: (Hamid), can you please repeat your question?

(Hamid): Yes, the TWL is high. People, they want a job, for example, retail, normal pay wage is less. It's \$10 to \$13 or \$14 an hour and they — the SGA is 2,190 a month. You see what I mean? So the job earnings is lower than the SGA earnings.

Kimberly Cutler: Okay, right. So I understand what you're saying. There is a difference in the amount required for trial work level and SGA and SGA blind. I do understand there's a difference and I'm not sure if the question is if you're asking why and if that's the question that I would have to defer to see if someone on the line from Social Security would have any response to that.

(Patrice): Good afternoon. This is (Patrice) and thank you so much for that question. We will definitely take that back. We don't set the blind and non-blind SGA limits through the Ticket Program. We just — we follow SGA's policy.

We can get in contact with our policy folks to see if there's anything that they can do to sort of re-evaluate that but there are a lot of factors that go into setting blind SGA and non-SGA amounts that are outside of the Ticket Program.

So we'll definitely take that back but it's not an — those are not amounts that are - that are determined within the Ticket Program but we can always bring that, your feedback back to our disability policy folks. Thank you.

Kimberly Cutler: Thank you, (Patrice). Okay and...

(Hamid): Okay. Yes. And because deaf people ((inaudible)) and it's easy to get a job with that because it's below —it's easy to get a job for that and I can provide services but the blind, they get that 2,190 and it's hard to help them with job services because they're above that, that 2,190, it's impossible how can I provide services to blind people. And I feel bad in that situation. I feel like I'm — my hands are tied, so.

Kimberly Cutler: Okay. Well, thank you. Thank you for your concern and as representative from Social Security did mention that they would definitely take your concerns into consideration and on and speak to someone on their behalf or on their side that handles this because this, like she said, is not something that is developed based on Ticket to Work. So thank you for that.

And so (David), we'll take...

(Melanie): Hey, Kim, this is...

Kimberly Cutler: What's that?

(Melanie): I'm sorry, Kim. This is - this is (Melanie) from Social Security. I just — I wanted to ask the last person asking a question. I just wanted to clarify. Did you say that you find it difficult to help individuals who are blind because you're trying to help keep them under that 2,190 mark?

(Hamid): No, no, the opposite actually. A couple of times I've seen blind and deaf-blind as well and hearing that are blind, they request for services and I know the SGA is 2,190 and that's high. It's hard for them to find a job with that high pay to meet the SGA and get credit or benefits. So it's hard for blind people to get a job with that SGA.

(Melanie): Okay. Thank you for clarifying. I just wanted to make sure I heard you...

(Hamid): Yes.

(Melanie): ...correctly.

(Hamid): And that's what I meant.

(Melanie): Okay. Thank you. Sorry, Kim. Thank you.

Kimberly Cutler: That's okay. Thank you, (Mel). Okay. And (David), we'll take one more question from the phone lines.

Operator: Okay. Yes. We do have one more question in the queue. We have from (Sandra Abbott) with Abbott & Associates.

Kimberly Cutler: Good afternoon.

Operator: All right, (Sandra). Your line is open. You may be on mute.

(Sandra Abbott): I'm sorry. Good afternoon, everybody. My question is with the portal. When I go into the portal to request a claim payment and it will — I'll put in the person's Social Security number and it will identify if the earnings have already been verified or not. In this situation, it will say that the earnings are verified.

And then the next question is dealing are you submitting pay stubs or submission of, I guess, verification of the earnings and it's like, don't answer that. If I say, no, I'm not submitting anything because the portal is saying that Social Security are already verified, that information, it won't let me print out a (fax pay) sheet.

So it ends up making me — it ends up in the situation where I'm having to put in the payment information in order to populate the (pay fax) sheet. So is that supposedly the way it's - I mean, it's telling me that I don't have to verify the earnings but if I — if I say no for verification, then it won't generate the (pay fax) sheet.

Kimberly Cutler: I think that the — in order to generating the cover sheet is so that if you do select that you're going to send something — if you're going to send in evidence of earnings and you — once you check that box, that will generate the fax cover sheet for you but you're saying you're not selecting the box and so you're not getting the fax cover sheet, right?

(Sandra Abbott): Well, what I'm saying is the portal says that the earnings have already been verified. My understanding is the earnings have already been verified then I shouldn't — I don't have to send in the pay stubs.

Kimberly Cutler: Correct. It depends on the type of payment. So if you're requesting a Phase 1 Milestone 1 through 3 based on earnings already proven or you're getting that message in the system then you would - you would need to submit either pay stubs or a PoR or proof of relationship. So we'd have to have that information sent in.

So are you — is that what you're talking about? Like, how do you — because that's what's happening. If it's a Phase 1 Milestone 4 even though, excuse me, you have that message, you're still required to submit your proof of relationship in the form of pay stubs or the PoR and that would - you'd be able to get that facts, that facts cover page if you hit yes.

Am I missing your question or did someone else...

(Sandra Abbott): No. I think you're answering it. So in other words with the say Milestone 1 payments, I mean Phase1 — Phase 1 Milestone 1, 2, 3, regardless if it says that the earnings have been verified, I still have to send in the pay stubs...

Kimberly Cutler: Pay stubs or a pay...

(Sandra Abbott): ...in order to generate.

Kimberly Cutler: Right. Pay stubs are preferred but you would have to — so you'd have to establish proof for relationship, right, for those three milestones. And in order to do so, either pay stubs because pay stubs would be a standalone. So your pay stubs would show earnings and proof of relationship.

But if you're unable to obtain your pay stubs, then you would need to submit a PoR which is a proof of relationship form along with your payment request, right. So you would need that information submitted with your payment request for those three types of payments, Phase 1 Milestones 1, 2 and 3.

I don't know if that - hopefully that answers your question.

(Katie): Hi, this is (Katie).

(Sandra Abbott): Well, I mean it...

(Katie): I just wanted to jump in. So when the portal was created, the only information that we expected ENs to fax was earnings - proof of earnings information which is why when that screen popped up, it tells you that you have sufficient earnings, right? And then ask you if you want to fax in earnings for that checkbox.

You don't have to click that checkbox which makes all those that box where you actually key in the earnings up here if you are trying to submit the PoR. You would not try to fax in or create a fax cover sheet at that step.

Ideally what you would do is just follow through the screen like normal. Don't check the box that you're faxing something in. It's going to make a work case in your pending. Go to that beneficiary or go from that work case and you have the option to fax in additional information. Use that option to then create a different fax cover sheet. That is the ideal way to do it.

(Sandra Abbott): Okay.

(Katie): Because otherwise, we're going to get...

(Sandra Abbott): Okay.

(Katie): ...something in our side of the application that tells us that we're waiting on a pay stub or that you've actually faxed in a pay stub. So that actually kind of messes up our (MRI) because we think we're opening a pay stub from you and that's not what you've submitted. So ideally, you should use that fax additional information. Have you used that before?

(Sandra Abbott): No.

(Katie): That is in the Ticket portal user guide if you have a copy and if not, I would encourage you to reach out to the help desk and they could guide you through how to get to that. So that is the...

(Crosstalk)

(Sandra Abbott): Okay. Thank you.

(Katie): It is something recent that we put in the last couple years. So the portal itself hasn't kind of matched it. We don't have a box there saying, "Oh, well, do you want to submit a PoR?" We — the portal is not there yet so you have to take an extra step.

(Sandra Abbott): Okay. All right. Thank you.

Kimberly Cutler: All right. Thank you, (Katie). And (David), I'd like to ask Adelle. Adelle, do we have any questions in the chat?

Adelle Barr: Yes, ma'am. When I submit for payment to the system, says that earnings have been verified. Does that mean that I don't need to send in copies of that pay stub?

Kimberly Cutler: If they submit earnings — I'm sorry, Adelle. If they submit — if they get the notification that earnings already proven, do they need to submit pay stubs?

Adelle Barr: Right.

Kimberly Cutler: Yes. I would say yes because, again, pay stubs is the primary evidence of earnings because there may be earnings in the system that may not satisfy your payment. So I would encourage you, if you have pay stubs, please always, always submit your pay stubs.

Adelle Barr: Very good. Okay. At some point, do you think it'd be possible to add the date of disability onset to the information in the portal?

Kimberly Cutler: I'll let (Katie) answer that one.

(Katie): Can you repeat the question, please?

Adelle Barr: Sure. At some point, can you please add the date of disability onset to the information in the portal?

(Katie): We cannot add that. That is private beneficiary information. That (deals) will not be added to the portal.

Adelle Barr: Okay. When will the 2021 Payments at a Glance be released?

Kimberly Cutler: We're actually working on that information now so we do anticipate it should be released in the next week or so. We will send out a GovDelivery message alerting service providers when the information is on the website.

Adelle Barr: Okay. And I think this question was from earlier on. Do we know when the earnings estimator including 2021 will be updated?

Kimberly Cutler: Whenever we post the 2021 Payments at a Glance, we will also post the earnings estimator too. So we'll have that information to come up. We'll post it. Okay.

Adelle Barr: Okay. I have a comment here about denial reasons. A comment about most common denial reasons, not a surprise of most common denial reasons due to the catch-up of reported wages being posted at local offices. And since local offices were closed in a transition to work at home, it appears that they're now catching up as we can see payments approved of last spring and summer. So thank you for that comment.

And let's see. I am not familiar with 24 hours temporary. Is there something that you mentioned earlier about something being temporary? Is there a way to see if I need to request payments that were previously denied?

Kimberly Cutler: Okay. So the - I'm sorry, Adelle. I'm not...

Adelle Barr: Yes. This - I'm just trying to fit in that question.

Kimberly Cutler: Yes.

Adelle Barr: It's from (Kathy) with Best Buddies International. She was, I'm not sure if you mentioned something about something 24 hours being temporary.

Kimberly Cutler: Yes. We do have...

Adelle Barr: She's followed up — that's okay.

Kimberly Cutler: Go ahead. Yes. So yes, so we do have — there is a 24-month aged claim rule where she said she's not familiar with the original rule is that ENs must submit payments within 24 months following the month the Ticketholder — the Ticketholder's work and earnings meet criteria for payment, right?

SSA sent out a GovDelivery message announcing a temporary 24-month aged claim rule that started November 1 and will end May 1, but this temporary rule only applies to Outcome payments.

So - right. So that's what we mentioned was that there was a temporary change or temporary 24-month aged claim rule but it only applies to Outcome payments at this point through May 20 - through May 1 of this year.

Adelle Barr: Okay. Is there an anticipated end date for this ePay period?

Kimberly Cutler: No. Not at this point. We are still waiting for the release of the ePay file. So at this point, we do not know the number of SSNs that will be on the file. So what we would just — we would just notify ENs when we start processing the file, but we can't anticipate when we will complete it because we haven't received it yet.

Adelle Barr: Okay. Where can I find more information about this aged equals claims rule?

Kimberly Cutler: It's actually — let's see if we have it posted. I have to get back to them on that one, Adelle.

Adelle Barr: Okay. No problem.

Kimberly Cutler: Because I'm not sure if we have it. Where it is? I don't know. I know it's in their agreement, but I will make sure. Okay. Adelle, we'll take one more from — let's see. Let me type. Just trying to write down, I need to follow up with that one.

Adelle, we'll take one more for the chat and then we'll see if we have any on the phone line.

Adelle Barr: Okay. Earnings estimator, you already answered that. If a client is an Outcome and still in current pay, are pay stubs still required for submission?

Kimberly Cutler: So if the beneficiary is an Outcome, it can't be in current pay.

Adelle Barr: And still in current pay. Go ahead.

Kimberly Cutler: Right. So if you're in the Outcome phase, then the beneficiaries in the - so the benefits are in a suspense status. And but — so you can't be an Outcome and in current pay but maybe this will help. But if you're submitting for Outcome payments, right, and if we do — if you do not get the message earnings already proven in the system, then yes, you would still need to submit evidence of earnings because whether the earnings are...

Adelle Barr: Okay. So there was...

Kimberly Cutler: ...verified in the system or through the ENs submitting evidence of earnings, we must have that before we make any type of payment.

Adelle Barr: And the same question that there was follow-up there, how long would it take for Social Security to update records showing that the client is working? And then once those benefits are suspended, will there be any back pay?

Kimberly Cutler: The question was how long does it take the field office to update the record?

Adelle Barr: More or less that's the question, yes.

Kimberly Cutler: Okay. That I cannot answer. I do know that they are working. And like we mentioned, there was some issues presented due to COVID-19 pandemic but the field officers, they are working. They are conducting their cessations, but I do not have a timeframe as to when that information or how long it's going to take them to update the information.

Adelle Barr: Okay. And then once suspended...

(Katie): Yes. And this is (Katie).

Adelle Barr: Go ahead.

(Katie): All right. And this is (Katie). I did want to jump in. So our expectation was it would be that the — all of the earnings verifications from the last, I guess, from April to October should have been completed before the end of this calendar year. So ideally a lot of these additional months will be caught up in the ePay file that's about to come out though we did extend it to May of 2021 just to give us three ePay files to catch all these additional months.

So we are confident that if there was a cessation that did not get recorded and you would have received that payment in ePay file that between the next ePay file that we're processing very shortly and the one after that, we will have caught up and ENs would have gotten all the available payments that they would have been due.

So that's our intention. We are trying to make sure everyone gets caught up and gets the same opportunity. As long as you are in good standing and are eligible for ePay, you should automatically get those payments without having to do any extra work.

That's all what I have.

Adelle Barr: Okay.

Kimberly Cutler: Okay. Thank you so much, (Katie).

Adelle Barr: And there was...

Kimberly Cutler: Go ahead.

Adelle Barr: Once those benefits are suspended, will there be any back pay?

Kimberly Cutler: Once the benefits are suspended. What we're going to do again is we're — that's where that I think the temporary 24-month aged claim rule comes in. Once the benefits do go into suspense, they usually will give us a date of when those benefits went

into suspense and ENs would be able to request payment or we would hopefully, as (Katie) said, catch it through the ePay file.

And if we catch it through the ePay file, we will make all available payments. So if it's updated, if the record is updated now and they are in a suspense status, we will make all available Outcome payments from the month that the benefits went into suspense.

All right. So thanks, Adelle. So (David), do we have any questions through the phone queue?

Operator: Yes, we do. We do have two questions in the queue. We'll take our first question from (Jane Head) with Full Circle Employment Solutions.

(Jane Head): Hey there. Quick question. We recently came across a scenario where we reached Milestone-Outcome 12, but we didn't get a recon for the Phase 2 payments. And when we asked about it, we were told that Social Security said we wouldn't be due the recon payment because the client has since unassigned as Tickets.

So we were just curious as to why that might be or if we just need to follow up and do some more research on that.

Kimberly Cutler: Hi. This is Kimberly. So that actually - that inquiry actually reached my desk. And so...

(Jane Head): Okay.

Kimberly Cutler: ...I have been working with someone on your staff and we are researching that to see what's going on with those reconciliation payments and we will reach out once we have the final determination about that, but we are aware of that and we are working on that already.

(Jane Head): Wonderful. Okay. Thanks, Kimberly.

Kimberly Cutler: You're welcome.

Operator: And next we'll go to (Sandra Abbott) with Abbott & Associates.

(Sandra Abbott): Yes. I wanted to piggyback on one question that was dealing with the date of disability onset. Excuse me. In order to use the 18-Month Lookback, it requires that information. I have called the help desk a couple of times and I was told that they couldn't provide that information to me. So what other options do I have that I can get an accurate date of disability onset?

Kimberly Cutler: Well, when you're completing the 18-Month Lookback, it's not required. If you have it, of course, it's helpful so you would know what payments may or may not be on the table for your EN. But once — so what you would do is you would complete the 18-Month Lookback with the information that you actually have, right?

And once you submit your 18-Month Lookback Tool, we, TPM or SSA, we actually conduct a 18-Month Lookback Tool as well because there may be additional earnings in SSA's database that you may not have access to. We have access to the to the disability onset date.

So we would complete that as well. That's one of the reasons why when you request for Phase 1 Milestone 1, you're submitting your request, again, based on the information that you have so your 18-Month Lookback Tool may show that you're eligible for Phase 1 Milestone 1 or all of them.

When we conduct or when we complete our 18-Month Lookback Tool using information submitted by the ENs, earnings information submitted by the ENs, earnings information that in SSA's database including the disability of onset date, we plug all that information in.

For whatever, if the ENs are not eligible for one or all of the milestones, we will deny those

milestones upon your - once we receive that initial request for Phase 1, right. So — and so you don't have to wonder if you're eligible from after that point but as (Katie) mentioned, that's privileged information so we do not disclose that to ENs.

I don't know if you're speaking with your beneficiary and they may be able to tell you that. During the intake process or different conversations that you have with your Ticketholder, they may share that information. But as mentioned, we do not but we — once we have it, once you submit your request, we will complete the 18-Month Lookback Tool.

So it's not required. It's just very helpful if you have it. So you would just complete the 18-Month Lookback with what you have and submit your request.

(Sandra Abbott): Okay. And then the next question I have, I get denials and then I go to the explanation and the explanation is it's somewhat generic. It'll say denial due to — I'm trying to think of the one I received. Is there a way or is there an e-mail or a phone number that's connected to the actual payment, the Ticket payment department?

Kimberly Cutler: Yes. If you look —so you can't...

(Sandra Abbott): To get an explanation.

Kimberly Cutler: Right. So what you can do — so like you said and also on the website, on our Ticket to Work website under Resources. You can go there and you can look. We do have, like I said, if you go to the Ticket to Work website, on the website under — I'm trying to pull it up for you as we talk.

Under Resources and then you'll see on the left-hand side, Resource Documents. When you go there, we do have a payment denial reasons under the Ticket to Work Program. There's a PDF file there. And that file will actually give you a list of all the denials with the denial code with the — with the letters, the number that you see. And under that, you will be able to get an explanation of what this denial means.

So that's a very...

(Sandra Abbott): Okay.

Kimberly Cutler: ...very good tool to have. And of course, you do have the payments help desk. So I would encourage you first to take a look at the payment denial reasons under the Ticket to Work Program. Again, that's on the website under Resources. Take a look to see if your questions are answered there.

And if not, then of course, you can also use the resource of contacting the EN payments help desk, but I think that document is pretty good with explaining the different denials and also gives you tips on how to avoid those particular denials. So it's a great resource. I would encourage you to take a look at it.

(Sandra Abbott): Okay. Thank you. And then I have another question. You have really two good tools to help us as ENs and the one is the 18-Month Lookback. And then the other one is the Monthly Earnings Estimator. And I was wondering like in the future, would they provide like a training to walk us through in detail how these two tools can be used?

Kimberly Cutler: Okay. Yes. Again, I would definitely — we want to make sure that you guys have all the resources that you need but I would — I suggest again reach out to the payments help desk with the questions about it and then if there's more training required, right, after contacting the help desk, then they can actually point you in the right direction to get that training.

We do have training that's offered through our EN development staff. So I can — I would encourage you to reach out to the help desk with specific questions about that. And again, if you need a one-on-one or more training, then they can point you in the right direction to get that - get that knowledge that you need.

(Sandra Abbott): Okay. And I've done that. They've been — and especially, I'd like to give kudos for (April). She's been very, very helpful.

And so the thing is, I mean, I've gone through the process that you're suggesting. So how do I — not suggest, how do I request additional training on the - on those two?

Kimberly Cutler: Okay. So when you reached out to (April), was that a request that you made was to have additional training?

(Sandra Abbott): No. No, she was helping me to understand and she did with the 18-Month Lookback. That's pretty clear. It's just the Monthly Earnings Estimator. We've talked about it but I don't know if any of the other ENs are having questions on it as well but it would be a benefit to learn how to use the tools effectively so that...

Kimberly Cutler: Of course.

(Sandra Abbott): ...we can be more efficient in knowing what and what not to do when we process this, the claims for payment.

Kimberly Cutler: Of course. So what I'm going to do is give you an e-mail address and you can reach out and just let them know you're requesting specific training. And like I said, they — this department is our EN Development department and they do have monthly trainings on different topics and different things related to just Ticket to Work in general.

So I will give you this e-mail address and you could just send your request to them. Let them know you're requesting additional training and what topics and again, and then they can point you in the right direction to make sure you get that training.

(Sandra Abbott): Okay. Thank you.

Kimberly Cutler: All right. So - okay. So are you ready for the e-mail address?

(Sandra Abbott): Yes, ma'am.

Kimberly Cutler: Okay. So it's enoperations@yourtickettowork.ssa.gov.

(Sandra Abbott): Okay. Got it. Thank you.

Kimberly Cutler: You're welcome. (David), do we have any other questions?

Operator: Yes. We have one more question in the queue. Next, we'll go to Natalie Harrison with Lighthouse Louisiana.

Kimberly Cutler: Hello.

Natalie Harrison: Hello. Hello.

Operator: Go ahead - yes, go ahead.

Natalie Harrison: Can you hear me?

Kimberly Cutler: Yes, ma'am.

Natalie Harrison: Okay. I have my phone on mute. I'm sorry. I was calling regarding the earnings estimator. I do want to admit that I have been using it for the past two years. It is a great tool.

The first page gives an explanation of how to use it. It gives you the breakdown of which months qualify and pertain to SSI recipients or SSDI if they're achieving (STAAR) TWL,

but I do have kind of like a request when the new one for 2021 comes out.

When you start to enter the start and pay date and gross amount, about the third — I think it's the third and fourth row, it has a glitch. So you can use the first two open rows. The third and fourth has glitches and then all the other ones work.

So I just wanted to point that out so that when you guys are working on revamping it for 2021, maybe that glitch can kind of be looked at because every earning estimator that I use for each beneficiary every month, the third and fourth row in that section is skipped. I don't know if it's a big deal but I just wanted to point that out.

Kimberly Cutler: Okay. That's good information because of course, we're always looking for ways to improve the tools and we want to make sure the tools are — that they're effective and helping you guys submit for payment, the right payment, cut down on denials and things like that. I'm going to give you my e-mail address. Could you please just...

Natalie Harrison: Right. Right. That's what I was...

Kimberly Cutler: Right. Could you please just send me a quick e-mail? I mean I was trying to write it down but this is something I want to make sure, because like you said, we're in the process of updating it with the 2021 information. So any improvements that we can add, I want to make sure we have that in.

So my e-mail address is — it's kimberlycutler@maximus.com. I would really like for you just to send that to me so like I can take a look at it so we can — we can see if there's — if there's a glitch going on, we want to definitely fix it before we actually ((inaudible)).

Natalie Harrison: Yes, it was then — it appeared in the 2018, 2019 and 2020 version. So that's why...

Kimberly Cutler: Okay.

Natalie Harrison: ...I'm aware of it because I just know to skip it every year.

Kimberly Cutler: Okay, yes. Thank you for that and please send it to me...

Natalie Harrison: Okay.

Kimberly Cutler: ...and I'll definitely take a look at it and go from there.

Natalie Harrison: Okay. Thank you.

Kimberly Cutler: You're welcome. Okay, (David), so we're — we got about three minutes left in the hour so do you have any other questions? We probably can take maybe one more.

Operator: Yes, we do. It looks like a follow-up from (Sandra Abbott) with Abbott & Associates.

(Sandra Abbott): Yes. I just had a question in regards to the ePay. What initiates that for an EN? I mean, do you have to have like so many years before you actually receive ePay process or — I'm just wanting to know what initiates an EN to start receiving ePay payments?

Kimberly Cutler: Right. So first of all, there's nothing that you as an EN would have to do like, you don't actually have to apply for ePay. As long as you're EN, as long as you are - as (Katie) said earlier, you're in good standing so you're not on-hold, you haven't been terminated, you've passed your annual service and support reviews, then your EN should be on the ePay file.

And I do believe that if you are not eligible for ePay due to some reason, you would — you would receive notification of that. But yes, so long as you're not on-hold status, you're not terminated and again you've passed your service and supports reviews, then you should be eligible to be on the ePay file. But the thing to remember though...

(Sandra Abbott): Okay. Thank you.

Kimberly Cutler: ...even if you're on the ePay file, please remember that if a Ticket has been unassigned from your EN then that's not going to be on the ePay file. So just be mindful of that because some ENs make the ePay file, they have questions about a payment but yes. So other than that, you should be fine.

And like I said, we will make a note or there will be notification or alert posted in the portal when we start processing the next ePay file but the ePay file is processed based on done — I'm sorry. It's processed based on SSNs and not done.

So you — if you're on the ePay file, you may receive some ePay files early on and you may not — I mean you pay payments early on but you may not receive another file and another payment until a week or two later. So it's based on that.

(Sandra Abbott): Okay. And then how — I mean, how do you distinguish — I guess when you receive payment, does it say ePay or...

Kimberly Cutler: No. I think the key thing would — you would know that you didn't request it, right? Like I didn't request that, and you will receive your payment. So yes. Because you don't have to request...

(Sandra Abbott): Okay...

Kimberly Cutler: ...anything for ePay, right? So if you're submitting for a payment and you can always go in the portal and you can check payments made to me and you could

use different resources in the portal to check your payments but all other payments outside of ePay, you would have to submit through the portal. So you could just make sure you're checking payments made to me and just kind of get an idea of what's coming in.

(Sandra Abbott): Okay. And does that include — the ePay, does that include like all of the months or the, we'll say, the phases that the beneficiary is eligible for?

Kimberly Cutler: I'm glad you're making that ((inaudible)).

(Sandra Abbott): I mean ((inaudible)).

Kimberly Cutler: So that's included. Yes, I'm sorry. Thanks for bringing it up.

(Sandra Abbott): I'm sorry.

Kimberly Cutler: We do not pay Phase 1 Milestone 1 payments on the ePay file. That was huge. So I'm sorry I forgot that. So it mentioned everything about what the EN has to do to get on the ePay file and talking about unassignment — unassigned Ticket is not there, we do not process Phase 1 Milestones on the ePay file.

So those are payment requests that you would have to request through the portal remembering that your Phase 1 Milestone 1 through 3 require proof of relationship. So very good question.

But Phase 2 Milestones and Outcomes are on the ePay file and if there are payments — if you're on the ePay file and that you have SSN that reach — SSNs that reach or meet the payment requirement for Phase 2 Milestones and Outcomes, then we will initiate those payments. But Phase 1 Milestone 1s, you still would need to request via the portal.

(Sandra Abbott): Okay. Thank you.

Kimberly Cutler: All right. Thank you for bringing that up. Okay.

(Debbra Tennessee): Kim, this is (Debbra).

Kimberly Cutler: Yes, ma'am.

(Debbra Tennessee): Just one thing I want to add to that, even though we may pay Phase 2s and Outcomes to ePay, we still — you still have to remember that we pay — we process payments in order.

So there may be earnings out there or whatever for Phase 2s or Outcomes but you — all your Phase 1s must be at some point addressed whether they are unavailable due to look back earnings or whether or not you've submitted a payment request and we've paid those but just want to let you know that as Kim says, we process Phase 2s and Outcomes but we have to process payments in order.

So if no Phase 1 Milestones have been paid, we can't go on to Phase 2s and Outcome unless Phase 1s were unavailable for some reason, like VR closures or look back earnings.

Kimberly Cutler: Okay. Very good point. Thank you, Ms. (Tennessee). I did forget to include that. Thank you.

And I do know that we're just two minutes past the hour, but Adelle did mention that she has one question in the chat that she would like to ask. And after that, (David), that will be the last call or the last question.

So - and go ahead, Adelle.

Adelle Barr: Thanks, Kim. Excuse me. A consumer who received a lot of upfront work, we completed the IWT, assigned a Ticket and then once they got all of our information that

we give to them, they disappear. So can we send in a PoR and get reimbursements for services?

Kimberly Cutler: And they've already assigned that this is after they assigned a Ticket, Adelle?

Adelle Barr: Correct.

Kimberly Cutler: Yes. So if the Ticket is assigned to you, right, and you haven't unassigned it. If the Ticket is assigned to you and you can — you can — the Ticket is still assigned, you can submit for payment but yes, you do have to provide proof of relationship. And the main thing to remember is you do have to provide proof of relationship during the milestone period, right.

So if you're asking for a Phase 1 Milestone 1 at January, you need to show proof of relationship and — or a detailed list of services that were provided during January because that's your milestone period. Same thing, if you're asking for a Phase 1 Milestone 2, that's three months.

You have to make sure you're showing proof of relationship during that milestone period. Hopefully that answers their question.

All right. So it is almost five minutes past the hour. Thank you. Thank you all so much for your time. Thank you for SSA staff for helping answer the questions. Very good questions. And again, just thank you all for your time today.

Please make sure you join us for our next scheduled All EN Payments Call on April 27. So I look forward to speaking with you then. Please enjoy the rest of your day. Thank you.

Operator: And that does conclude today's conference. We thank you for your participation. You may now disconnect.