

Welcome

Kimberly Cutler welcomed everyone to the call. She provided insight into the payment process on the following topics: ePay file stats, ePay reminders, review of the 24-month Aged Claim Rule, policy clarification on claim months more than 24 months old or Aged Claims for Phase 1 Milestones.

Resources are available at the end of the presentation, as well as the Questions and Answers forum.

Announcements

End of Temporary Suspension of the 24-month Aged Claim Rule for Outcomes

The temporary suspension of the 24-month Aged Claim Rule for Outcome Payments due to COVID ended on May 1.

New Ticket Portal Release – August 14, 2021

An upcoming Ticket Portal release on August 14 will add a final enhancement to eliminate all manual payment requests. This means:

- When ENs request Phase 1 Milestones, they may get a message preventing them from requesting Phase 1 Milestones via the Portal. At this time, ENs must either fax or mail in their payment requests.
- After August 14, ENs will still get the message but can continue submitting their requests via the Portal rather than submitting them manually.

Kimberly thanked SSA staff for the upcoming enhancement.

ePay file Stats

1. TPM completed processing the April ePay file in June, with the following results:
 - Processed 14,445 SSNs
 - Paid 4,329 SSNs
 - Total amount paid: \$7,978,410.00
2. TPM started processing the July ePay file on July 26.

ePAY Reminders

Kimberly provided the following reminders:

- ENs may submit payment requests through the Ticket Portal instead of waiting for ePay. ENs are encouraged to let ePay take its course because TPM can pay Phase 1 Milestone 4 now, along with Phase 2s and Outcomes via ePay.
- ENs must still submit payment requests for Phase 1 Milestones 1-3 through the Ticket Portal with proof of relationship, this is either pay stubs or a completed Proof of Relationship form.
- Unassigned Tickets are not included in ePay.
- ENs must have passed their annual Services and Support review.
- The ePay file is processed by SSNs order not DUNS.

Review of the 24-month Aged Claim Rule

The temporary suspension of the 24-month Aged Claim Rule for Outcome Payments due to COVID ended on May 1. This means:

- An EN shall request a payment no later than 24 months following the month the Ticketholder's work and earnings meet the criteria for SSA to make the payment. Please note, SSA will not accept payment requests for periods outside the 24-month window.

Policy Clarification – Claim Month More than 24 Months Old (Aged Claims) for Phase 1 Milestones

SSA sent out a GovDelivery message on June 11 informing ENs of the policy clarification:

- The Ticket Program Agreement (TPA) states that the Social Security Administration (SSA) will not pay ENs for claim months more than 24 months old. While no distinction is made between Phase 1 Milestones, Phase 2 Milestones and Outcomes, SSA noticed the need to clarify this policy.
- For Phase 2 Milestones and Outcomes, ENs must submit payment request for claim months within the 24-month window. This rule has not changed.
- Kimberly provided the following example:
 - EN ABC submits a payment request for Phase 2 Milestone 1 for claim month February 2019. That's outside the 24-month window, so the case will be denied. You will see this in your denied cases when you run your report in the Portal. The denial reason will be *Request Received More*

Than 24 Months After the Claim Month, with the comment Per the TPA's condition for Receipt of Payments Rule, this (whether it's a Phase 2 or Outcome) claim month is outside the 24 months ENs have to request Ticket payments. The EN will need to resubmit the payment request for Phase 2 Milestone 1 for a claim month that is within the 24 months.

Policy Change

If an EN requests a Phase 1 Milestone payment within 24 months following the month the Ticketholder's work and earnings meet the criteria for SSA to make the payment and includes proof of relationship (a paystub or Proof of Relationship (PoR) form establishes proof of relationship for Phase 1 Milestone 1 through 3) and per SSA's record, the correct attainment month for the payment is outside of the 24-month window:

- SSA will deny the requested claim month as an incorrect claim month.
- In addition, SSA will now create a work case for the correct attainment month and deny it as an aged claim.
- The EN can now request (and receive) the next Phase 1 Milestone payment if it is available. The missed Phase 1 Milestone payment will be available at reconciliation.

There are a couple of things to take away from the new policy. ENs must still submit claims within 24 months. That hasn't changed. The Aged Claim Rule has not changed. But if there is an earlier attainment month that's in SSA's database and that month is outside of the window, ENs can pick up the missed Phase 1 Milestone at reconciliation. This will allow ENs to move on to their next payment and not get stuck on the one submitted with the incorrect claim month.

Kimberly provided an example of this policy change:

- **Example:** EN ABC submits a Payment Request (PR) for P1M1 for claim month 08/2019 with proof of relationship. There is an earlier attainment month for P1M1 at 04/2019 in SSA's system. The PR submitted by the EN (P1M1 at 08/19) will be denied.
 - Denial Reason: INCORRECT PHASE 1 CLAIM MONTH REQUESTED BY EN
 - Comment: Earlier attainment month payable at 04/2019 per earnings on SSA record or information provided by the EN.
 - TPM Staff will create a new case with the correct attainment month for P1M1 at 04/2019 and deny due to aged claim.

- Denial Reason: CORRECT ATTAINMENT MONTH MORE THAN 24 MONTHS AGO
- Comment: Correct attainment month for P1M1 is 04/2019. This will be paid at reconciliation.
- The EN can now request Phase 1 Milestone 2 payment if it is available. The missed Phase 1 Milestone payment will be available at reconciliation.

TPM will not initiate the next available payment. ENs will need to request the next available payment.

TPM Resources

- 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
 - For questions and issues related to Ticket assignment, the Service Provider website and the Ticket Portal: ensystemshelp@yourtickettowork.ssa.gov

Questions and Answers

A question-and-answer period followed, which is part of the call recording and transcript.