# All EN Payments Call Transcript
# October 25, 2022

**Katherine Jett:** Hello everyone and welcome to today's quarterly All EN Payments Call. My name is Katherine Jett. I'm the TPM Project Coordinator and your moderator for today's call.

Before we begin with our agenda and presentation, I would like to review a few logistics and housekeeping items:

- First, this meeting is being recorded and transcription is being captured.
- Please remain muted at all times during the call unless called upon by the facilitator.
- Please feel free to ask a question in the MS Teams chat section, which will be monitored by TPM.
- If joining via phone and you wish to ask a question, raise your hand utilizing star 5 and you will be unmuted by the facilitator. Then press star 6 to unmute yourself.
- Please limit questions to one per participant per raised hand and do not duplicate questions.
- Additional questions or comments can be sent to EN Payments help desk at yourtickettowork.ssa.gov.
- Close captioning in available for participants who join using MS Team application, or you can utilize the separate closed caption link provided in the chat.
- To turn on closed captions and Teams, go to the three ellipses at the top of the MS Teams window.
- Click on more actions and go down the list to turn on live captions.
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Thank you in advance for your participation.

This quarterly All EN Payments Call is scheduled for 60 minutes.

Next slide please.

Now to the agenda.

Today's agenda will cover:

- Welcome
- Announcements
- ePay file stats
- Proof of relationship requirements
- Failed proof of relationship
- Resources and the question-and-answer forum

It is  my pleasure to introduce the TPM, EN Payments manager and your host for today's call, Kimberly Cutler.

Take it away Kimberly.

**Kimberly Cutler:** Thank you so much, Katherine.

Good afternoon, everyone. And as Katherine said, thank you guys so much for joining our quarterly All EN Payments Call today. So, Katherine did cover the agenda topics that we're going to go over today. I will go ahead and jump right into the first topic, which we have one announcement. SSA sent out a GovDelivery message earlier this week informing ENs that in order to receive Phase 1 Milestone 1 through Phase 1 Milestone 3 payments, ENs must submit a proof of relationship with their Ticketholder. That's in addition to meeting all other payment requirements. So, this is not new. This has been in place I think since 2018, that ENs must submit proof of relationship when submitting for those payment types. Showing proof of a relationship with your Ticketholder can be accomplished through submitting pay stubs or a completed Proof of Relationship form that documents a list of intensive employment support services and monthly contact with the Ticketholder during that Phase 1 Milestone period.

The PoR form must list services and dates of services provided to the Ticketholder during the Milestone period. This has been in place since 2018, but the purpose of the announcement is because we really want to make sure that ENs are aware that you will have three opportunities to provide the required proof of relationship for the requested Milestone period before the Ticket is unassigned. We will go into that a little bit further down in the call today and the presentation. But we just wanted to make sure that was clear, that ENs must provide proof of relationship when submitting for Phase 1 Milestones 1 through 3 and you will have three opportunities to provide the required proof of relationship for the requested Milestone period before the Ticket is unassigned. So that was the announcement that went out on the 20th of this month, so last week. But again, we'll go into that little further as we go through the presentation.

TPM and SSA staff completed the last ePay file in September. From that file there were 14,475 claims processed. We paid 4,412 SSNs on that last ePay file and the amount paid was a little over $7 million. So those are the stats from the last ePay file that we completed in September and just want to note that we will start processing the next ePay file next week. We will have an announcement posted in the Portal that will let you all know once we start processing the next ePay file.

And because we're going to start processing the next file, we wanted to provide a few ePay reminders, right. So, Phase 1 Milestone 4 is paid via ePay, but ENs must still submit payment requests for your Phase 1 Milestones 1 through 3 through the Ticket Portal with proof of relationship. I know I keep talking about that, but it’s imperative that you guys understand the Phase 1 Milestones 1 through 3 requirements, but we will pay Phase 1 Milestones for via ePay.

On this side, unassigned Tickets are not included on the ePay file. ENs must have passed their annual services and support review in order to be ePay eligible.

And the ePay file is processed in SSN order, not by your PID or provider ID. We announced this from the last few files. So, Phase 1 Milestone 4, Phase 2 Milestones and Outcomes are all paid via ePay. So ENs are encouraged not to submit for these payment types via the Portal when the EN portion of the ePay file is being processed. So, submitting for such payments slows down processing and causes duplicate claim months.

As I mentioned earlier, we will place an announcement in the Portal so that you guys will know when we're processing the ePay file. When we’ve completed the EN portion of the file, we will place another announcement in the Portal. We do ask that you let ePay take its course. So, please just hold off from submitting your Phase 1 Milestone 4, Phase 2 Milestone, and Outcome payments during that time. That would really help cut down on those duplicate claim months that we see while we're processing ePay.

If you do submit a request for a Phase 1 Milestone 4, Phase 2 Milestones or Outcomes during ePay, that SSN will not be processed until it comes up on the ePay file. So, you might as well just wait and let the ePay file take its course. If you're eligible for ePay and you have SSNs that are on the file that we have the earnings in the system and if all payment criteria are met, then we will make those payments. So please just adhere to that and let it take its course. Let us pay all of those payments before requesting them through the Portal.

Another ePay reminder is PII or Personal Identifiable violations will remove your EN from ePay for three months, or one ePay file. If you are removed from the ePay file, of course you must submit all payment requests through the Ticket Portal. So here we have an example because this is one of the reminders that we've added since the last call. So, if an EN violates the PII rule while a file is currently being processed (November), then your EN will be removed from the next ePay file, so that would be January. Just to be clear, I mentioned that we're going to start the next ePay file soon. We're in the month of October and if you have a PII violation in November, you're already on the start of the file that we started processing in October, so your EN will remain on that file through completion.

But when we start the next file, which will be scheduled for January, your EN will be removed from that particular file. Just wanted to make sure that we added that.

As a reminder, if there is a PII violation from your EN, we will remove your EN from the ePay file for three months or for one file. Some may say they committed a PII violation, but I'm still getting my ePay payments. That's because your PII violation was committed after we started processing the file. But your EN will be removed for the next file, and this was just the example if we're processing and it's November. If the next file is scheduled to start in January, then your EN will be removed from that file. So, we want to make sure we added that, so you guys are very clear if there is a PII violation.

So, we talked about what is proof of relationship. Proof of relationship can be either pay stubs or documentation of intensive employment support services and monthly contact with Ticketholders during the Phase 1 Milestone period. ENs must document all services, including dates the EN provided services to the Ticketholder during the entire period of the claim using the PoR form.

And please note that Phase 1 Milestones payments require monthly contact with the Ticketholder, so quarterly contact does not show proof of relationship.

And just remember that the requirement for proof or relationship is when requesting Phase 1 Milestones 1 through Phase 1 Milestone 3. So, you want to be very clear when you are submitting for your payment requests for those payment types.

If an EN is unable to establish proof of relationship with the Ticketholder at any point during the Phase 1 Milestone period, the Ticket will be unassigned.

Because again, for Phase 1 Milestones 1 through 3, you know as ENs you guys are required to make monthly contact with these Ticketholders. So, we want to make sure that you are clear that if you're unable to establish proof or relationship, then that Ticket will be unassigned.

And here we just wanted to provide a chart that shows you all acceptable forms of evidence for proof of earnings and proof of relationship requirements. So of course, regardless of the payment type that you are asking for, you have to have earnings. Either you are going to provide the earnings or we're going to have earnings verified in SSA's database. But what we wanted to provide here was just the breakdown as it relates to proof of relationship requirements. You can see on the left-hand side we have acceptable proof of earnings and then on the right is the required proof of relationship. So, if you are submitting pay stubs, then you don't have to submit the PoR form because pay stubs are a standalone to show earnings and establish proof of relationship. If you are getting the pay stubs from your Ticketholder, then you're contacting them. You are talking to them monthly. So, the pay stubs will serve as proof of relationship. If you are submitting The Work Number as evidence of earnings, then you must provide either pay stubs or the PoR form because you still need to satisfy proof of relationship. So, if you have the pay stubs, of course they are always preferred. If you do not have them, then you are going to need to submit the completed proof of relationship form that will list the services provided and the dates that those services were provided to the Ticketholder.

If you are submitting the Employer Prepared Earnings Statement as your evidence, then you also need to provide pay stubs or the completed PoR form.

If you are requesting for Phase 1 Milestones 1 through 3 and you see the message in the Portal that reads "Earnings already established" in SSA's systems, you still need to provide pay stubs or a completed PoR form for your proof of relationship. So, we just wanted you guys to kind of see when it's required. So just remember, if you have the pay stubs, those are the best, those are the preferred earnings. But if you do not and you are using other sources for your earnings verification, then you must supply the completed proof of relationship form. OK.

Now we are providing some proof of relationship examples that hopefully will just explain a little bit further of what we're looking for when you're requesting payments. These are the examples that we have here.

ENs submit a payment request for Phase 1 Milestone 1 at April 2022, and it is based on the Portal message "Earnings already established." So, the EN is required to provide proof or relationship with the Ticketholder for April 2022. That is your claim month. So, you are required to provide proof or relationship by submitting pay stubs or a completed PoR form that lists services provided during the month of April.

So, when you are requesting a Phase 1 Milestone 1, it's only one claim month. You have to provide proof or relationship. So even though you have the message "Earnings already established" in the Portal, if you have pay stubs, by all means send in your pay stubs. If you do not have pay stubs, then you would need to submit your PoR, and you must provide a list of services. You must show the services provided during the month of April.

OK, now we are going to move to the next example. So, EN submits payment request for Phase 1 Milestone 2 at June 2022. Your proof of earnings is The Work Number report. Months included in the Milestone period are April, May, and June. We all know at this point in order to satisfy Phase 1 Milestone 2, you must have three months of earnings at Trial Work Level, right. For Phase 1 Milestone 2 at June, you are including earnings from April, May, and June to satisfy that payment.

So, the EN is required to submit a completed PoR form that lists services provided to the Ticketholder for at least one of the two additional months.

So that would mean either May or June. In this example you have already received payment for Phase 1 Milestone 1 at April, right, and you're using April towards your three months count to satisfy your Phase 1 Milestone 2. So, you have already proven your relationship for April. That's how you got paid for your Phase 1 Milestone 1. But in order to get paid for your Phase 1 Milestone 1, you're adding on two additional months. So, the requirement is because you are using The Work Number as your earnings, you must show us the services or positive contact that you made for at least one of those two additional months. So, we would look for May or June. We would not use the services that you provided in April because that was for April. We are now looking to see what additional services you have provided in the Phase 1 Milestone 2 range. OK. So, we are on the same SSN. So now ENs submit a payment request for Phase 1 Milestone 3 at September 2022. Again, you are using The Work Number report as evidence of earnings. So now for your Phase 1 Milestone 3, again, we all know that we have to have six months. You are requesting your Phase 1 Milestone 3 in September.

And the months included in that Milestone period are April, May, June, July, August, and September, right. So now the EN is required to submit a completed PoR form that lists services provided to the Ticketholder for at least one of the three additional months. So that's July, August, and September. So anytime you are adding on the additional months to satisfy your Milestone, you must show the services provided in one of those additional months or positive contact. So again, you used April to satisfy your Phase 1 Milestone 1. So, you showed us that you had services there, now you are asking for Phase 1 Milestone 2. In order to get paid for that, in addition to your earnings meeting the requirement you have to show us a service provided for the additional months of May or June. So, you provided that, which is why you got your Phase 1 Milestone 2.

So now you are into your Phase 1 Milestone 3. The additional months that you are adding to that are July, August, and September. So now you must show us services provided during one of those three additional months.

So, we added this example so you guys could all understand what we are looking for when you're requesting your payments for Phase 1 Milestones 1 through 3.

All right.

So, we wanted to provide you guys with an example of what a passed PoR looks like and then the next slides after that, we are going to show what a failed PoR looks like. And we know all PoRs are very individualized, right. We are just providing some examples. So, in this example the EN is asking for Phase 1 Milestone 2.

From the previous slide, we saw that you were asking for that at June, right. This is for Phase 1 Milestone 2. This is a PoR that you are submitting for Phase 1 Milestone 1.

So here you can see a list of services that you provided to the Ticketholder and the first date that we have here is in December and it goes through June. That is good because remember, you have to show a service for one of the two additional months, which would be May and or June. And as you can see, one of the reasons why this PoR passes is because in May the EN called the Ticketholder to see how things are going with the job and everything is going OK. So, you have reached out and you've made contact with your Ticketholder in May. So, then we have in June the EN emailed the Ticketholder requested information for reporting wages to SSA. That is a service that you were providing to your Ticketholder. So, when we are looking at this PoR for your Phase 1 Milestone 2 at the claim month of June. In the previous examples that we gave, you have to show a service or positive contact for one of the two additional months and on this PoR we can see that both months May and June. The EN reached out and made contact and also provided the service. So, this is what we look for and this is why this PoR would pass the assessment.

And this is just the last page of the PoR. You have to have the name of your EN representative. And please remember that the PoR must be signed. Your PoR may have the services listed, but we have to look for different things on your PoR. One of the key things that we look for is making sure that we have a signature. So, you want to make sure that you have a signature on your PoR.

Now the next example that I mentioned, we are going to show what a failed PoR looks like. Again, we are looking at a PoR for a payment request for Phase 1 Milestone 2 at June.

OK, so here we are looking for a service or positive contact in one of the two additional months, which will be May or June. So, we see here there was an entry for April, but we do not see anything for May. There is a June date, but it says called but was unable to leave a message because the voicemail was full. That is not a service and that is not a positive contact.

So, what we were looking for to satisfy proof or relationship for Phase 1 Milestone 2 at June was not established on this PoR because we did not see a service provided or positive contact during May or June, which was one of the additional months. So, this PoR would fail the assessment.

And what we put here was just a blank PoR. Towards the end of the call, we will provide where you can actually locate the PoR form on the Ticket to Work website. Please make sure that you guys have this information anytime you are requesting a Phase 1 Milestone 1 through Phase 1 Milestone 3 if you guys are not submitting pay stubs.

Please know that the proof or relationship form is not a standalone for payment. It is not evidence of earnings. It is only used to show established proof of relationship. So just wanted you to kind of see what the form looks like.

Of course, if you need to add information, please feel free to add it. We'd rather have too much information than not enough. We have to make sure that when you're requesting payment that you're showing us that positive contact or proof of relationship to the Ticketholder during the Milestone period.

OK, so this is just a blank form you. Make sure that you fill it out all of the information.

Make sure that you indicate here which Milestone you are requesting. And as I mentioned earlier, please make sure that the EN representative is signing this form because it is invalid if we do not have a signature.

Now, as I mentioned in the beginning, we sent out the announcement about if an EN is unable to establish proof of relationship with the Ticketholder at any point during the Phase 1 Milestone period, the Ticket will be unassigned. So, if an EN submits for Phase 1 Milestone payment and the PoR submitted has failed the poor assessment twice, then TPM will outreach to the EN to submit a new payment request with proof of relationship.

Failure to provide proof of relationship with the third payment request will result in the unassignment of the Ticket.

And so again, if you do submit for payment request with the failed PoR, you will see the denial code in the Portal. You will have your comments so you will see that it failed and why. So, if we receive a request for a Phase 1 Milestone payment for example, and you submit the PoR twice and it failed the assessment twice, TPM will send an outreach email letting you know that this particular SSN has failed the assessment twice and that you would need to resubmit your payment request. And that if you do or when you submit it and if that PoR fails again, which means you are unable to establish proof of relationship, the Ticket will be unassigned.

So just please make sure guys, you know you are staying in touch with your Ticketholders, contacting them, providing services, and documenting the services that you're providing. Please make sure that you have all that information ready so that when you are requesting for Phase 1 Milestones 1 through Phase 1 Milestone 3 that you are able to complete your PoR to show the services provided and the dates of those services provided. Make sure that those dates and services are within that Milestone period that you are requesting.

And as mentioned, we do have all of our EN Payment forms on the Ticket to Work website and here you could actually see where you can locate those forms. You can locate the PoR form and submit it with your payment requests for Phase 1 Milestones 1 through 3.

So, you know we always have our topics that we cover for each call, but we invite you to share topics that you would be interested in discussing through this forum also. So, our goal is to help educate you and provide clarification on processes and procedures related to payments. So, if you have any payment-related topics that you would like for us to discuss during this forum, please send those topics to ENPaymentshelpdesk@yourtickettowork.ssa.gov. We would love to receive them. We will go through them and if it is information that we can add and share, we will. We encourage you to let us know what topics you would like for us to cover. Now we think that we cover some really good topics. It is very good information that we provide but we're always open to see what you guys would like to hear more about.

So, you can email those topics over.

And then of course, we have our great resources here, the helpdesk that we have, and agents are available Monday through Friday. You have your hours here, you have your options to press, depending on the services that you need or the help that you need. You could also email us information, but not PII. Please remember, do not email any personal identifiable information. For questions and issues related to Ticket assignment, the Service Provider website and the Ticket Portal, you can go to ENsystemshelp@yourticketnetwork.ssa.gov. And of course, if you have payment-related issues, we have an amazing helpdesk. They are always there to help you guys, so please call them or send them an email at ENpaymentshelpdesk@yourtickettowork.ssa.gov. One thing that we encourage you to do when you are emailing for payment-related issues, is to use your Work Case Number or the SSA reference number from the Portal case. That way you are not sending any PII, and that Work Case Number or reference number will allow us to pull up the case and look at the information. So, you just want to make sure that you are utilizing the wonderful resources that we have here.

And so that concludes the presentation portion of the call. I'm going to hand it back over to Katherine, but before I do, I just wanted to also mention when you are asking your questions, please remember that if it's a very specific question about a case, you want to reach out to the helpdesk because they're able to go inside the case and see the history of the case. We cannot see that information in this forum So if you really need to know about a case, please reach out to the helpdesk for those details about a very specific case.

I will at this point go ahead and hand it over to Katherine. So, Katherine, back to you.

**Katherine Jett:** Thank you, Kim, for those very Informative updates. We will now transition to the Q&A period.

First as a reminder to ask a question over the phone, please raise your hand on Teams by selecting star 5, and when you are called on, you will be unmuted by our facilitator. Then press star 6 to unmute yourself. For participants joining on the MS Teams application, please place your questions into the chat. Raise your hand.

Also, please identify yourself by name and please limit your question to one per raise hand. Look at the top of the reaction's icon at the top of the screen. Choose the raised hand option.

At this time, we will ask our facilitator, Keitra, to help us identify our first participant with their raised hand.

**Keitra Hill:** Currently I do not see any hands raised.

**Katherine Jett:** OK, thank you Keitra. We will go to the chat.

Alexis, do you have any questions from the chat?

**Alexis Weinrich:** There are a few questions regarding PoRs and when getting in contact with the Ticketholder. What do we do if we cannot get in contact with the Ticketholder?

What do we do if the claim month per earnings is, let us say April 2022, but we can't contact them in April, but we contact them in May? What would the claim month then be?

**Kimberly Cutler:** So, you asked a couple questions. Was the first question, what happens if the ENs are trying to contact the Ticketholder, but they are unable to contact the Ticketholder?

Was that the first question?

**Alexis Weinrich:** Yes, many are concerned about that. Like you know, they got them the job. But now they have lost contact because they have the job, they don't want to contact anymore. How did they show proof of relationship?

**Kimberly Cutler:** Yeah. Well, I guess it really depends, right. So, it's a couple of things. If you as an EN and I'm sure you know you've helped them get the job, but then if you lose contact with them, then you do not have a relationship with them. And unfortunately, we know that you know that may happen but for Phase 1 Milestones 1 through 3 you have to show that relationship. So, if you're unable to contact them monthly and are unable to provide a service, unfortunately, that Ticket may be unassigned because that's the policy. You have to show that you're able to get in contact with them. So, if you can't reach them, you know that I understand if you can't reach them, you can't establish a relationship with them. Unfortunately, you're not going to be able to get paid for your Phase 1 Milestones 1 through 3 if you cannot establish that relationship.

The second question, Alexis?

**Alexis Weinrich:** Well, I'll read it directly. If the next payment is Phase 1 Milestone 2 and earnings are established on the Ticket Portal for 2/2022, 3/2022 and 4/2022. The EN has pay stubs for 2/22 and 3/22 but cannot get stubs for 4/2022. EN attempted to contact the Ticketholder in 4/2022. EN has contact with Ticketholder in 5/2022 and has stubs. Is it possible to get Phase Milestone 2 at 5/2022 instead of 4/2022 since they didn't have contact, right?

**Kimberly Cutler:** So, no. If you're asking for Phase 1 Milestone 2 at April, make sure I have it right. You're asking for Phase 1 Milestone 2 at April, but you have pay stubs for February and March, right? So, your Phase 1 Milestone 1 was paid at February. So, you had your pay stubs that showed proof of relationship. Now you're asking for April. Remember, you only have to show a positive contact or services provided for March or April, but you have your pay stubs for April. I'm sorry, you have your pay stubs for March. So, your pay stubs, that's your proof of relationship. You have proof of relationship for one of the additional months. So, you would still bill for Phase 1 Milestone 2 at April.

**Alexis Weinrich:** Yep.

**Katherine Jett:** Alexis, do we have any more questions? We'll take one more from the Chat.

**Alexis Weinrich:** Because if an EN sent an email with information such as wage reporting tip sheet or how to create an ssa.gov account after the voicemail was full, would this count as contact with the Ticketholder?

**Kimberly Cutler:** I don't know if someone from SSA wants to chime in, but as long as your email shows that you have sent out a service, you've sent out information to the Ticketholder. What we cannot accept is if we just see in the PoR sent email to Ticketholder.

We have no idea what you said, but if you can show that you've sent an email that benefits the client, I think that would show your proof of relationship. But I see Janelle turned the camera on, so I know Janelle has something to add.

**Jennelle Bratcher:** I did. Thank you so much, Kim, and I did try my best to articulate a response to this question in the chat, but I wanted to add if that information was requested from the Ticketholder and you also annotate in your PoR that was information that you were sending back at the request of the Ticketholder, then it would absolutely serve as something that we would approve.

**Kimberly Cutler:** Thanks, Janelle. Thank you. And that's the key thing to remember, when you're sending out an email note that it was requested. This is something that the Ticketholder actually needs, then that can show your proof or relationship. It's a lot of things that does not show proof of relationship, but one of the things that we see a lot is ENs will say email sent to Ticketholder to mail in pay stubs. That's not a service. You're just asking them for their pay stubs. You have to show whatever information you're sending them is a benefit to the Ticketholder. It is a service that they've requested that's going to, you know, help the beneficiary either obtain employment or stay working. But you can't just say email and ask that they send us their pay stubs.

Things like that does not show proof of relationship.

**Katherine Jett:** Kim, at this time we'll go back to Keitra to identify participants with raised hands. Do you have anyone Keitra?

**Keitra Hill:** Yes, we have a question from Lori Popjoy. Lori, I have opened your mic. Please unmute yourself.

**Lori Popejoy:** Sorry, app on unmuted. Can you hear me? Thank you for taking my call. I wanted to find out with The Work Number with Equifax and Social Security, where we run some of these reports and we still do not have net wages. Has that been worked out yet or is that continuing?

**Kimberly Cutler:** It's something that I don't know. Katie wants to jump in, but we are aware of that, Lori, and we, TPM and SSA, we are working internally to establish a protocol for that and see how we're going to move forward with that, because we know that The Work Number was originally an approved source of earnings and at the time SSA approved this as a source of earnings. The document or the report actually provided all of the required information.

Of course, we've received The Work Number report that does not have net wages included and as of right now, we are not accepting that as proof of earnings. But Katie, did you have anything to add? But I know we are talking about it with SSA.

**Katie Striebinger:** Uh, Kim. No, you covered that perfectly. You know, our policy is not changing. We need that information in order to make a payment. So, we're still trying to figure out the best way to proceed forward. But at this point, we don't have any changes to the current policy.

**Lori Popejoy:** OK, thank you. Cause what they had told me was that it has to do with programming that has to do with larger companies with multiple divisions, you know, like an Amazon or something like that.

Where they have not been able to pull that out on a broad just an Amazon search. So, I didn't know if you guys were aware of that or not.

That it's. Thank you.

**Katherine Jett:** Thank you Kim and Katie.

Keitra, do we have another one?

**Keitra Hill:** Yes, we do have a question from Justin Baker. I have opened your mic. Please unmute yourself.

Hello Justin, do you have a question?

**Justin Baker:** There we go. Can you hear me? Good afternoon.

Really quick question, hopefully regarding payments and what is shown on the Ticket Portal. I've noticed we're trying to clear up our own systems for invoices within our own program — our own system itself and we have unpaid invoices on our system that either shows having paid or have not been paid from the Ticket Portal, and we're finding that there are a lot of past participants who are no longer assigned to our account. And are not eligible for Ticket that have just disappeared entirely. We are unable to find past payments for someone who has aged out or is no longer eligible to receive SSI or SSDI. Is there any way to view those or are they gone entirely no matter what?

**Katie Striebinger:** Good. I'm going to give you the answer I have and then if this doesn't work for you, please contact the helpdesk so someone can walk you through. You know, data is live while you're in the Portal. But there are two lists. There are the beneficiaries currently assigned to me and the beneficiaries formerly assigned to me. Yes, they should all be on that list as formerly assigned to you unless something is happened in the system. And if SSA has wiped out their disability and wiped out their Ticket, yeah, they might have disappeared altogether because, you know, we can't even find them to generate them in the report. So, if you're seeing something like that, like you're in that list and you don't see them, you're going to have to reach out to the helpdesk so we can kind of work through that with you and figure out what happened. But every assignment you've ever had should be on one of those two lists. And every payment you've ever had should be on that the payment list. So, everything should be in the Portal if everything is working properly. But, you know, we definitely can't speak to check if something else has happened to those particular cases. So, I would encourage you to contact the helpdesk.

**Justin Baker:** OK, alright, thank you. The helpdesk, correct? OK, thank you.

**Katie Striebinger:** Yes. Kim, is that slide up with the helpdesk? And I would honestly encourage you to call because then you could see it in the Portal and, you know, give them the numbers at the same time. Yeah, I'll probably call them.

**Justin Baker:** Yeah. Thank you. Very much.

**Katherine Jett:** Do we have our next participant.

**Keitra Hill:** Yes, we do. We have a hand raised from Sonya Harrison.

**Katherine Jett:** Hi Sonya, do you have a question?

You can unmute yourself at this.

**Sonya Harrison:** Can you hear me? OK, so my question is, how long does the Ticketholder stay your Ticket? Like is this forever? Are they assigned to you forever? Even if like that you have no contact with them? You can't reach them. They don't respond to your email.

**Kimberly Cutler:** Umm, so as far as the Ticket assigned to you, the EN can unassign the Ticket at any time. The Ticketholder can unassign the Ticket at any time, so that's just the way that works. So no, if you have a Ticketholder and you've exhausted your resources and you're trying to contact the Ticketholder, and they're not responding, or as the EN have a right to unassign the Ticket and vice versa if the Ticketholder is trying to reach their employment network and they can't, they too can unassign the Ticket. So, you can always just unassign.

**Sonya Harrison:** OK. So, I tried to do that last week. I tried to go in and do one because I've never done it before. I'm sorry.

Do you have to have some type of proof? What do you do when you go into the Portal and you unassign the Ticket?

Is it just unassigned the person and that's it?

**Kimberly Cutler:** Yeah, I think so.

**Sonya Harrison:** But we did not unassign the Ticket. OK, thank you. We got audited, I was told that if they're on your caseload, they're always on your caseload. So, I was like, what if you get audited for people that you have no contact with?

But you've not unassigned them. You will be responsible for proof of relationship, right?

**Kimberly Cutler:** When you said they're always going to be on your caseload. I don't know if that's an internal process that you guys have, but for us or for the Ticket, once you go in the Portal as an EN, once you unassign the Ticket, then it's unassigned. Because you unassigned the Ticket, you would no longer be eligible for any type of payment because you as the EN once you unassign the Ticket, you're telling us you're no longer providing any services to that Ticketholder. So, I'm not sure about the, you know things like when you say they're still on your caseload or I'm not sure if that's an internal work.

**Sonya Harrison:** Yes, that's internal word. I'm sorry, but perfect. Thank you so much.

**Katherine Jett:** OK. You're welcome. Welcome. Thank you, Sonia.

Keitra, do we have anyone else with their hand raised?

**Keitra Hill:** Yes, we have a raised hand from Barbara Velmont.

Hi Barbara, you're unmuted. You can ask your question.

**Katherine Jett:** Barbara You're unmuted. You can ask your question, just click the microphone at the top to unmute.

**Barbara Valmont:** Can you hear me now? Yes, if, uh, back on the proof of relationship. So, if you send an email to a Ticketholder that the wage reporting just not only asking them to send in their pay stub, but also reminding them to send them to EN and also to Social Security and also give giving them the information on how to report their wages, would that be acceptable proof of relationship?

**Kimberly Cutler:** If you are emailing the Ticketholder how to report their wages to SSA, you're giving them the steps and helping them. If they've asked you for that information and you're helping them, you are providing a service. The difference is when just you know email Ticketholders to send in their pay stubs. That's the difference and we look at each PoR individually. So, we just want to make sure. I don't want to see that you're explaining how to report their wages.

It has to be information, you know, conversation that you've had with your Ticketholder. This is a service that they need, and the email needs to be very clear about the different services that you're providing with the dates. So again, you want to make sure that you're emailing or providing information that you've talked to the Ticketholder about. They are expecting this information. You've identified this service as something that they needed. So, you just need to be very clear and detailed in your emails and what you're providing to your Ticketholder.

**Katie Striebinger:** And I think I just want to add, I mean it is called proof of relationship, not proof of I sent an email, right? Just like Kim keeps trying to say, you know, there is a conversation. There's a relationship and you know this. You should have just had not too long ago, right. Your intake process you should have had a conversation with them. You know you get their pay stubs to get Phase 1 milestone through Phase 1 Milestone 3. We do realize that Phase 1 Milestone 4 and further it gets harder to get in contact with beneficiaries it's hard to reach them.

They're already working. They don't want the services and supports, but we do feel that you know this early in the relationship. There should be a relationship, so that's what I want to make sure that we're getting across. You know we will be posting this PowerPoint afterwards. I saw a couple of questions about that. We'll be posting it to the events archive so you can look over the examples and what we're trying to communicate across. And if you do have any questions after reviewing this and you know hearing the feedback, you know, please reach out to the helpdesk.

**Katherine Jett:** Keitra, do we have anyone else with a question?

**Keitra Hill:** Yes, we have Ann Austin.

Hi Ann, you're unmuted. If you want to ask your question, go ahead please.

**Ann Austin:** We all know that Ticketholders, even briefly, get lost, especially during early employment when dealing with a new job and their disability families, etc. If it is a Phase 1

Milestone 2 and a person is lost for the second and third month, but we get in contact with them, say the fourth month, if we use a new year, January being Phase 1 Milestone 1. They contact Phase 1 Milestone 2; we don't have February or March but would if we reestablish contact in April or can that be your Phase 1 Milestone 2?

**Kimberly Cutler:** So, the thing to remember is when requesting your months, we're going to make sure we're not ignoring months that have the earnings, right? So, we can't skip months if the earnings are there you know we see the earnings especially in the system to satisfy the payment. We can't skip it. So, in this scenario you received your Phase 1 Milestone 1 in January, right, but you haven't been able to contact them in February or March and you weren't able to contact them until April. But they're earnings in the system for January, February, and March. So like Katie was saying we're looking for and established relationship in the first phase. So those are one of those cases we are looking for a service in one of those two additional months, you must provide us with that relationship. But I'll ask Kate and Jennelle to jump in, but I understand what you're saying is like you kind of lost them, but that's the whole purpose of having that relationship with them. Is trying to stay in contact with them. But I'll defer to Katie if you can explain that, probably a little better than I could.

**Katie Striebinger:** Say you're in April. You've reestablished that contact. You know, ideally that you couldn't contact them in February and March in April when you established that contact like this is what I would encourage you to go see if we can get them to get me those pay stubs, right. You can still get those pay stubs if you can get proof of earnings for February or March then.

That will get you that Phase 2 Milestone. If you weren't able to actually have that contact right, the pay stub counts as proof of relationship.

So that could be an important part. If you have trouble connecting with them is that when you are able to make that connection again, you know, try to get those pay stubs or make it up front in your intake process. If you know that this is common.

Umm, that would be my suggestion.

**Ann Austin:** We could get those pay stubs in six months later and then request the payment.

**Katie Striebinger:** Having the paystubs, yeah, the idea is, you want to bundle all together like Kim always says. Have it already to go. So, when you know you're going to request this this Phase 1 Milestone and you know you need that proof of relationship don't submit the payment request until you have it all together and ready to go.

**Katherine Jett:** Keitra, do we have anymore raised hands from our participants that have questions?

**Keitra Hill:** We do not have any more raise hands at this.

**Katherine Jett:** OK, at this time we'll go back to the chat. We'll take one question.

Alexis, do you have any questions?

**Alexis Weinrich:** A lot of PoR questions, which I do believe we are trying to hit a lot and we've entered a lot. You know, they're all worded slightly differently, but I believe we are responding via Kim, Katie, and Janelle.

**Katherine Jett:** All right. Thank you very much Alexis.

Next slide please.

**Keitra Hill:** We have one more question from Natalie Harrison.

Natalie, you're unmuted.

**Katherine Jett:** If you want, go ahead, and ask your question.

You can unmute yourself.

**Natalie Harrison, CESP:** I'm sorry I'm a little bit horse, but my question is if I have a beneficiary that I'm working with and they prefer not to be contacted on a monthly basis to request earning verification, is there any kind of way that we can cover ourselves as ENs?

Or, when those beneficiaries prefer not to be contacted.

**Kimberly Cutler:** Umm, that's a good question. I think we had that.

Before, like Katie mentioned, one of the important things is during your intake process, right during the intake process, when you're meeting with your Ticketholders, as you're developing goals and things with them and they're telling you what they need, you also at that point want to tell them what you expect from them. So, you can let them know, during the first Milestone period, that you're required to be in contact with them. I have to provide these services for you. I think it came up before where if you have a Ticketholder who is basically just saying I'm fine, do not contact me again, just let them know again what your requirements are and that is required for you to contact them in the first six months of working together. So, I am going to do that outreach just to make sure you're OK. That would be my suggestion is just to set those expectations early so that you know, you won't hopefully run into this. But again, you're going to have to show that established relationship, so I would just set the stage in the beginning and let the Ticketholders know.

Yeah, that would be my suggestion.

**Natalie Harrison, CESP:** The person works overnight hours. So, I'm contacting him in the daytime, which is aggravating him, and I'm trying not to be a nuisance. You know what I'm saying.

**Kimberly Cutler:** So just ask him to send you his pay stubs. That's one of the things that Katie said earlier. So, you again, he's working, so you don't necessarily have to contact him, you know, and say, John, you know, you're working, it's great. I don't want to bother you during the day because you're resting. But each month I just need you to send me your pay stubs or if they get paid, you know, biweekly. You can set it up to have them send you the pay stubs each month or each pay period. But that can just be an agreement that you guys have cause remember, pay stubs will show your proof of relationship.

**Natalie Harrison, CESP:** Yeah. That's what I was going to ask. So that will meet the requirement by having actual check stubs.

**Kimberly Cutler:** Yes, because that means you only be able to get them from him or her so that shows that you're talking to them. They're providing that information so absolutely. And that scenario, I would definitely ask that he just sends you his pay stubs.

**Natalie Harrison, CESP:** OK, alright. Thank you.

**Katherine Jett:** You're welcome. Thank you, Kim. Thank you, Natalie, for the question.

**Katherine Jett:** At this time, we don't have any more questions. I'd like to say on behalf of the Ticket Program Manager, I'd like to thank all of our presenters and everyone attending for this informative and interactive session.

Looking ahead, we will have the next All EN Payments call January 31, 2023, from 1:00 to 2:00 p.m. Eastern Time.

Thank you again for attending and have a good rest of your day. This concludes the All EN Payments Call. Thank you.

**Kimberly Cutler:** Thank you, Katherine. Thanks everybody.