## **Ticket to Work Program**

**Timely Progress Review Basics** 

# Objectives

- Discuss Timely Progress Review (TPR) fundamentals
- Discuss how the Ticket to Work Program impacts Continuing Disability Reviews (CDR)
- Discuss TPR requirements
- Describe the TPR process, including TPR appeals and re-entries
- Describe the responsibilities of service providers as related to the TPR process
- Discuss the TPR implementation schedule
- Identify resources available to service providers

Timely Progress Review Fundamentals and Continuing Disability Review Protection

## **Timely Progress Review Fundamentals**

- The Social Security Administration's way to track the progress of a Ticketholder
- Review conducted about every 12 months
- Impact upon CDR protection very complex
- Assignment, progress made by the beneficiary, or payment of services by or to the service provider does not guarantee protection from CDR. Must consider all aspects of in-use/not in-use status (past TPR failures, successful TPR re-entries, etc.).
- Service providers assist beneficiaries through the TPR process

# Protection from Continuing Disability Review

- CDR medical review that determines disability benefits eligibility
- Ticket to Work initially, no CDR for usually about 12 months
- CDR exemption renewed for usually about another 12 months if pass TPR

# Timely Progress Review Requirements Not Met and CDRs

- Ticket remains assigned to service provider
- CDR protection lost
- CDR not conducted immediately upon loss
- Rather, CDR conducted when regularly scheduled



# Timely Progress Review Requirements

# **Timely Progress Review Chart**

**Review Period:** You must achieve at least one of the requirements listed for your particular review period before we find that you have made timely progress for that review period. The review period is at least twelve months long, and there is usually one review a year. In the list below, the "Trial Work Level Amount" for 2015 is \$780. The "Substantial Gainful Activity Amount" for 2015 is \$1,090. These amounts can increase slightly each year.

### First Review

- 3 months of work at or above the trial work level amount; OR
- Complete at least 60% of a full-time course load for an academic year in a 2-year or 4-year college or a technical, trade, or vocational training program; OR
- Complete a combination\* of the above work and education requirements; OR
- Obtain a GED or high school diploma.

### Second Review

- 6 months of work at or above the trial work level amount; OR
- Complete at least 75% of a full-time course load for an academic year in a 2-year or 4-year college or a technical, trade, or vocational training program; OR
- Complete a combination\* of the above work and education requirements.

### Third Review

- 9 months of work at or above the substantial gainful activity amount; OR
- Complete a full-time academic year of study at a 4-year college; OR
- Complete a combination\* of the above work and education requirements; OR
- Complete a 2-year college program and earn a degree or certificate; OR
- Complete a technical, trade, or vocational training program.

# **Timely Progress Review Chart**

Fourth Review

- 9 months of work at or above the substantial gainful activity amount; OR
- Complete a full-time academic year of study at a 4-year college; OR
- Complete a combination\* of the above work and education requirements.

### Fifth Review

- 6 months of work and have earnings in each of those 6 months that prevent payment of Social Security Disability Insurance (SSDI) and Federal Supplemental Security Income (SSI) cash benefits; OR
- Complete a full-time academic year of study at a 4-year college; OR
- Complete a combination\* of the above work and education requirements; OR
- Complete a 4-year college program and earn a degree or certificate.

### Sixth Review

- 6 months of work and have earnings in each of those 6 months that prevent payment of SSDI and Federal SSI cash benefits; OR
- Complete a 4-year college program and earn a degree or certificate.

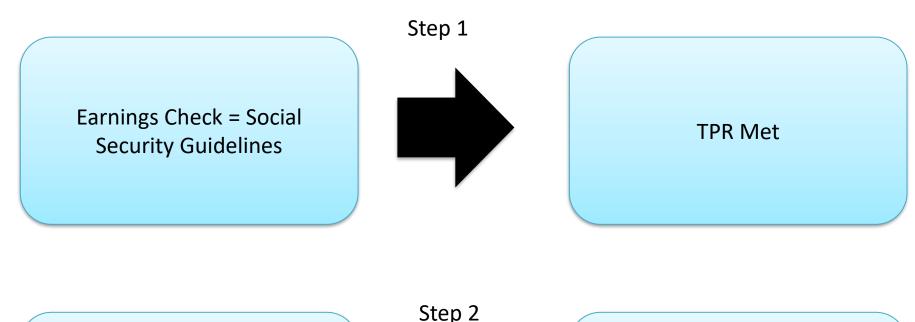
### Seventh Review and Any Additional Reviews

• 6 months of work and have earnings in each of those 6 months that prevent payment of SSDI and Federal SSI cash benefits.

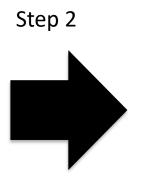
 $^{\ast}$  A "combination" means you can complete part of the work and part of the education requirements. We will count the parts you complete as percentages. Adding the two percentages together must equal 100% or more.

## **Timely Progress Review Process**

### **TPR Process**



Earnings Check ≠ Social Security Guidelines



SSA sends notice to beneficiary

# TPR Process – Step 2

- Selection criteria are very complex and includes such factors as current pay, CDR classification, assignment, and previous TPR history
- If selected for a TPR, SSA sends the Selection Notice to the beneficiary at the conclusion of about every 12month period of Ticket in-use status. This is to determine if the beneficiary is making the expected progress with work and/or education.
- If the TPM receives the SSA-1375 (part of the Selection Notice) from the beneficiary and the time frames are acceptable (within about 55 days), the TPM opens a case and begins a review

### **TPR Selection Notice**

Social Security Administration Important Information

> Ticket to Work P.O. Box 1433 Alexandria, VA 22313 Date: July 28, 2015

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We are writing to you because it is time for your 1st Timely Progress Review under the Ticket to Work program. Our records show that you are receiving employment support from MARYLAND EMPLOYMENT NETWORK. We must decide if you are making the required progress toward your vocational goals. To do this, we look at whether you are completing educational requirements, and getting and keeping a job.

#### What You Need To Do

Please complete the enclosed Progress Review Form SSA-1375 to tell us about your progress from December 10, 2014 through December 31, 2014. Please see the enclosed Timely Progress Review Chart for the requirements for the 1st progress review. You must return the form within 30 days from the date of this letter. Your reply is important. You may use the enclosed postage-paid envelope or fax the form to 1-703-893-4020. Our return address is the first address at the top of this notice.

We will review your answers to see if you have met the progress requirements for the 1st progress review. We will not send you another letter if you have made the required progress. We will send you another letter if we find that you are not making timely progress. If you are not making the required progress, we will no longer excuse you from scheduled medical reviews on your disability case.

We encourage you to continue working with MARYLAND EMPLOYMENT NETWORK toward your vocational goals.

#### If You Have Questions

We are here to help you. If you have any questions about your progress review or the Ticket to Work program, call the Ticket Help Line, toll-free, at 1-866-968-7842 (TTY 1-866-833-2967). Or, you can visit our website, http://www.socialsecurity.gov/work. You also may fax us at 703-893-4020, or write to us at the address at the beginning of this notice.

See Next Page

For general questions about Social Security benefits, please visit Social Security's website at http://www.socialsecurity.gov. You also may call Social Security toll-free at 1-800-772-1213 (TTY 1-800-325-0778), or you may write or visit any Social Security office. They also can give you information about other employment supports that help people with disabilities go to work. If you visit a Social Security office, please take this letter with you.

#### Suspect Social Security Fraud?

If you suspect Social Security fraud, please visit http://oig.ssa.gov/r or call the Inspector General's Fraud Hotline at 1-800-269-0271 (TTY 1-866-501-2101).

### Social Security Administration

Enclosures: Timely Progress Review Chart Privacy Act and Paperwork Reduction Act Progress Review Form SSA-1375 BRM Envelope ICN-588913

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Privacy Act Statement

#### Collection and Use of Personal Information

Public Law 106-170 and Section 1148 of the Social Security Act, as amended, authorize us to collect this information. We will use the information you provide to determine if you have met the progress review requirements for the Ticket to Work program.

Furnishing us this information is voluntary. However, failing to provide us with all or part of the information may prevent review of your progress. In order to be able to pass the progress review and remain excused from a medical review, you should answer the questions on this form.

We rarely use the information you supply for any purpose other than your progress review requirements under the Ticket to Work program. However, we may use the information for the administration of our programs including sharing information:

- To enable a third party or an agency to assist Social Security in establishing rights to Social Security benefits and/or coverage;
- To comply with Federal laws requiring the release of information from our records (e.g., to the Government Accountability Office and Department of Veterans Affairs);
- To make determinations for eligibility in similar health and income maintenance programs at the Federal, State, and local level; and
- To facilitate statistical research, audit, or investigative activities necessary to assure the integrity and improvement of our programs (e.g., to the Bureau of the Census and to private entities under contract with us).

We may share the information you provide with other health agencies through computer matching programs. Matching programs compare our records with records kept by other Federal, State, or local government agencies. We use the information from these programs to establish or verify a person's eligibility for Federally funded or administered benefit programs and for repayment of incorrect payments or delinquent debts under these programs.

A complete list of when we may share your information with others, called routine uses, is available in our Privacy Act Systems of Records Notices entitled Electronic Disability (eDib) Claim File (60-0320); Ticket-to-Work and Self-Sufficiency Program Payment Database (60-0295); and Ticket-to-Work Program Manager (PM) Management Information System (60-0300). Additional information about these and other systems of records notices and our programs is available from our Internet website at www.socialsecurity.gov or at your local Social Security office.

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#### Paperwork Reduction Act Notice

This information collection meets the requirements of 44 U.S.C. section 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 15 minutes to read the instructions, gather the facts, and answer the questions. You may send comments on our time estimate above to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401. Send only comments relating to our time estimate to this address, not the completed form.

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Social Security Administration Form SSA-1375, OMB approved No. 0960-0644	4. I completed a technical, trade, or vocational program during the review period.
Progress Review Form, 1st Review	School Name:
RETURN THIS PAGE to Social Security, Ticket to Work	Type of Program Completed:
Beneficiary: JANE DOE Social Security Number: 123-45-6789 TW01 Provider: MARYLAND EMPLOYMENT NETWORK Date: July 31, 2015	Month and Year of Completion:
Your Review Period: From December 10, 2014 through December 10, 2014 INSTRUCTIONS: Please inform us of your progress for your review period shown above by completing the items below on all remaining pages of this form SSA-1375. Check "Yes" or "No" for each item and where you check "Yes" provide any requested information on progress with work and earnings, education, or technical training. Then sign, date, and return all pages of this form SSA-1375 to Ticket to Work using the enclosed postage-paid envelope or by fax at 1-703-893-4020. It is important that you respond within 30 days of the date on this form. You may keep a copy of this form for your records.	5. I did not complete a technical, trade or vocational program, but I completed some credits/ hours/ courses in a technical, trade, or vocational program during the review period.     Yes No     Number of credits/ hours/ courses completed and number of credits/ hours/ courses needed to complete program School Name: Type of Program: Type of Program Pro
I. I worked at least three months of the review period with gross earnings at or above \$693.00 * in each of these months. Yes No	6. I completed a combination of earnings PLUS two or four year college credits or in a technical, trade or vocational program during the review period. Yes No
2. I completed a two or four year college program during the review period and earned a degree or certificate. YesNo	I worked months with gross earnings at or above $693.00$ * in each of these months.
School Name: Month and Year of Completion:	I completed credits/ hours/ courses in a two or four year college program or in a technical, trade or vocational program and the number of credits/ hours/ courses needed to complete program
3. I did not complete a two or four year college program, but I completed some credits in a two or four year college program during the review period. Yes No	School Name:  7. I obtained a GED or high school diploma during the review period. Yes No
Number of credits completed and number of credits needed to complete program	Name of School or Agency Providing GED:
School Name:	Month and Year of Completion:

*Amount represen can increase sligh	nts 90 percent of the Trial Work Level amount. This amount htly each year.
	Sign and date this form and mail or fax back to us.
the requirements	if I make, or cause to be made, a representation concerning of the Ticket to Work and Self-Sufficiency Program which I rould be punished by fine, or imprisonment, or both.
Signature	Date
	m SSA-1375 to Ticket to Work within 30 daysusing the paid envelope or by fax at 1-703-893-4020. Our return address
Social Security A P.O. Box 1433 Alexandria, VA 2	
Form SSA-1375, Beneficiary: JA	Progress Review Form, 1st Review NE DOE Number: 123-45-6789 TW01

# **TPR Decisions - Pass**

- CDR protection is extended for usually about 12 months
- No follow-up letter is sent regarding pass
- Beneficiary will receive the next review after about another 12 in-use months

# **TPR Decisions - Fail**

- The Proposed Failure Notice is sent explaining the option to appeal (SSA Review)
- If the failure is upheld, CDR protection ends following the appeal period and beneficiary is subject to regularly scheduled medical reviews
- No future TPR selections are made without a favorable subsequent action
- Assignment/re-assignment usually not affected by a proposed failure or a final failure, but must be in current pay

### **TPR Appeals and Re-Entries**

# SSA Review – Appeal

- Beneficiary has about 55 days to submit a request to appeal the decision
- Unlike the initial review, the request must contain evidence of progress made
- Acceptable forms of evidence include copies of paystubs, copies of transcripts, copies of certificates, etc.
- Request may be faxed or mailed to the TPM
- SSA makes the final decision
- The decision is mailed to the beneficiary

# TPR Re-Entry - Successful

- Beneficiary usually earns about 12 additional months of CDR protection
- Beneficiary notified of decision by mail
- Re-entry to in-use status is effective the month/year of the decision

# TPR Re-Entry - Failure

- Will show no change to existing status of not in-use
- Beneficiary is notified by mail of the unsuccessful attempt to re-enter TPR
- Beneficiary has 30+ days to appeal the failure decision by fax or mail to the TPM

Schedule and Status

# Schedule/Status

- Implementation began March 19, 2018, with 100 cases selected
- Additional training dates undecided at this time
- At this time, no TPR portal. So TPRs cannot be passed by service provider. Portal training will be provided before we expect you to use it for TPR activities.
- No opting out of TPR by service providers.
- Additional selections will be made soon

## Service Provider Responsibilities

# Timely Progress Review Responsibilities

- Understand the process
- Answer questions about TPR
- Ensure understanding by beneficiary
- Encourage a timely response to any requests for additional information
- Provide counseling and advice
- <u>TPRhelpdesk@yourtickettowork.ssa.gov</u> for questions

### Questions

# **Additional Information**

 Contact the TPM at <u>TPRhelpdesk@yourtickettowork.</u>ssa.gov