Agenda

1. Introduction and overview of TPA changes
2. Terminology changes
3. Overview of changes to:
   • Part I: EN Ticket Program Agreement
   • Part III: Statement of Work
   • Part IV: Terms and Conditions
4. Compliance and Implementation Requirements
5. Question and answer segment
Ticket Program Agreement (TPA) Call
July 20, 2017  3:00 – 5:00 pm ET

Participant Dial-in: (888) 394-8218 | Conference ID: 827-9297
Introduction and Overview of TPA Changes

- The TPA improves:
  - Flexibility and efficiency of the Ticket to Work (Ticket) program
  - Accountability and interaction between Employment Networks (EN) and Social Security
  - Active engagement of ENs
  - Outcomes for beneficiaries and long-term results
  - Authority for EN agreements moves from Office of Acquisition and Grants (OAG) to the Office of Beneficiary Outreach and Employment Support (OBOES)
Terminology Changes

- Request for Quotation (RFQ) is now the Request for Application (RFA)
- Blanket Purchase Agreement (BPA) is now the Ticket Program Agreement (TPA)
- Employment Network Service Branch (ENSB) is now Employment Network Service Team (ENST)
- Ticketholder replaces beneficiary (where appropriate)
- TPA award notification replaces contract award form SF-1449
Part I: EN Ticket Program Agreement

- Adds language regarding:
  - Payments
  - Extent of obligation
  - Unilateral and bilateral changes to the TPA
  - TPA terminations
    - Convenience – can reapply 180 days after termination
    - Cause – cannot reapply
Part III Section 1: EN Qualifications

- ENs must:
  - Have a website
  - Register with System for Award Management (SAM)

- Consumer-Directed Services (CDS) model discontinued
  - Current CDS ENs may continue

- ENs cannot provide services exclusively to family

- Definition and requirements added for Administrative ENs

- Employer ENs and Employer EN agents must commit to placing Ticketholders in an employer-employee relationship as opposed to a contractual relationship and must provide primary evidence as a condition of payment
Part III Section 2: Ticket Assignment

- **Mandatory:** Ticket Assignments via the Ticket Portal
  - Exception for ENs assigning Tickets for the first time or unusual circumstances
  - Ticketholders may notify the EN of their intent to unassign their Ticket but are not required to do so
  - ENs cannot knowingly market their services to Ticketholders assigned to Other ENs or State VR agencies
Part III Section 5: EN Payments (1 of 2)

- It is mandatory for ENs to submit payment requests via the Ticket Portal unless the EN is terminated or in unusual circumstances
  - Manual requests will be denied
- When ENs submit payment requests after Ticketholders unassign their Ticket, TPM will request documentation and description of services
- Number of payments ENs will be eligible for after Ticketholder unassignment is based on assessment of services provided
- ENs are not eligible for payments after ENs unassign Tickets
- CDS ENs are not eligible for future payments, including split payments, following the Ticketholder unassignment from the CDS EN
Part III Section 5: EN Payments (2 of 2)

- ENs terminated for cause must submit payment requests with earnings evidence **no later than 30 days** following the TPA termination month.

- ENs terminated for convenience must submit payment request with earnings evidence **no later than 90 days** following the expiration or termination of the TPA.
Part III Section 6: Referral Agreements between ENs and State VR Agencies

- Expanded definition of Partnership Plus
  - If a Ticketholder gains employment while a Ticket is in use with a State Vocational Rehabilitation (VR) agency and unassigns the Ticket and assigns it to an EN before completing 3 months of work, Social Security will treat the State VR agency closure as successful and not pay the EN phase 1 milestones

- Reduced timeframe for the referral resolution process when disputes arise between ENs and State VR agencies
Part III Section 7: EN Training

EN training is mandatory for all employees listed on the TPA as:

- Program Contact
- Payments Contact
- Ticketholder Contact

ENs and new EN personnel must complete the start-up training within 60 days following award or employment.
Part III Section 8: EN Data Collection & Reporting Requirements

- Only the EN signatory authority or the program contact can request changes to the TPA.
- Requests for TPA changes must be made in writing to ENST.
- ENs must maintain records which Social Security has the right to view at any time.
- ENs must report key personnel leaving and coming onto the project within the TPA stated timeframes.
Part III Section 9: Evaluating EN Performance

- All ENs are required to actively participate and:
  - Take at least one Ticket assignment within the first calendar year of the TPA award
    - Established ENs will be given one year from TPA signature date to meet these qualifications
  - Maintain at least three Ticket assignments each calendar year thereafter
  - Receive at least one Ticket payment during the second calendar year of the TPA award
  - Receive three payments during each calendar year thereafter

- Social Security will implement performance reviews for quality assurance
  - ENs who fail to follow Social Security’s reporting requirements are subject to sanctions, including termination
Part III Section 10: Dispute Resolution

- Procedure in place if Ticketholder bypasses EN’s dispute resolution process and takes dispute directly to TPM or Social Security
- Clarifies Ticket eligibility decisions
- Outlines process for resolving disputes between ENs and Social Security
Part III Section 11: Privacy, Security, and Suitability

- Prohibits ENs not in compliance with security and suitability requirements from initiating or continuing to work with Ticketholders
- Requires ENs to designate a suitability contact person
- Details record retention and disposal process
- Provider partners must be in compliance with security and suitability requirements
Part III Section 12: Statutory/Regulatory Understanding and Compliance

- All employees of ENs and their subcontractors/provider partners with access to PII must have Social Security suitability before assuming EN duties

- ENs must:
  - Use the Ticket Portal
  - Respond promptly to Social Security and TPM communications
  - Report TPA changes to Social Security within the established timeframe
Part IV Section 5: EN Security and Suitability Requirements (July 2013)

- In working under the TPA, EN contractor and subcontractor employees will not provide services to Ticketholders in venues requiring Personal Identity Verification (PIV) credentials.
- Social Security may terminate an EN’s TPA for repeated violations or behavior that demonstrates inability to perform under terms and conditions of the TPA.
Part IV Section 8: Protecting and Reporting the Loss of Personally Identifiable Information (PII): Employee Responsibilities (Dec 2008)

- Protecting and Reporting the Loss of Personally Identifiable Information (PII): Employee Responsibilities (Dec 2008)
  - Ticketholder PII includes information collected from outside sources while providing services under TPA
  - Clarifies what constitutes a Secure Area and Secure Duty Station
    - Private residence not routinely considered a secure duty station and requires approval
    - Provides expanded flexibility for disposal of Ticketholder PII to include “parties outside the EN location”
Compliance and Implementation Requirements

- To continue as an EN:
  - EN signatory authority must accept the TPA by September 1, 2017
  - Sign and date under Part I: Ticket Program Agreement
  - Update the EN information sheet

- If you do not agree to terms:
  - Reply by checking the block indicating that you do not wish to continue as an EN

- Return documents to ENservice@ssa.gov

- ENs will be terminated if not returned by September 1, 2017

- If you have any questions contact TPAHelp@ssa.gov
Questions

- An FAQ is located on yourtickettowork.com
  - Choose Information Center from the menu at the top
  - Choose Resource Documents from the menu on the right
  - Locate the Ticket Program Agreement (TPA) - Frequently Asked Questions (DOC) under the Program Resources header

- Questions from this call will be added to the FAQ