

# EN Payments Process

Ticket Program Manager (TPM)  
Social Security's Ticket to Work Program

# Course Objectives

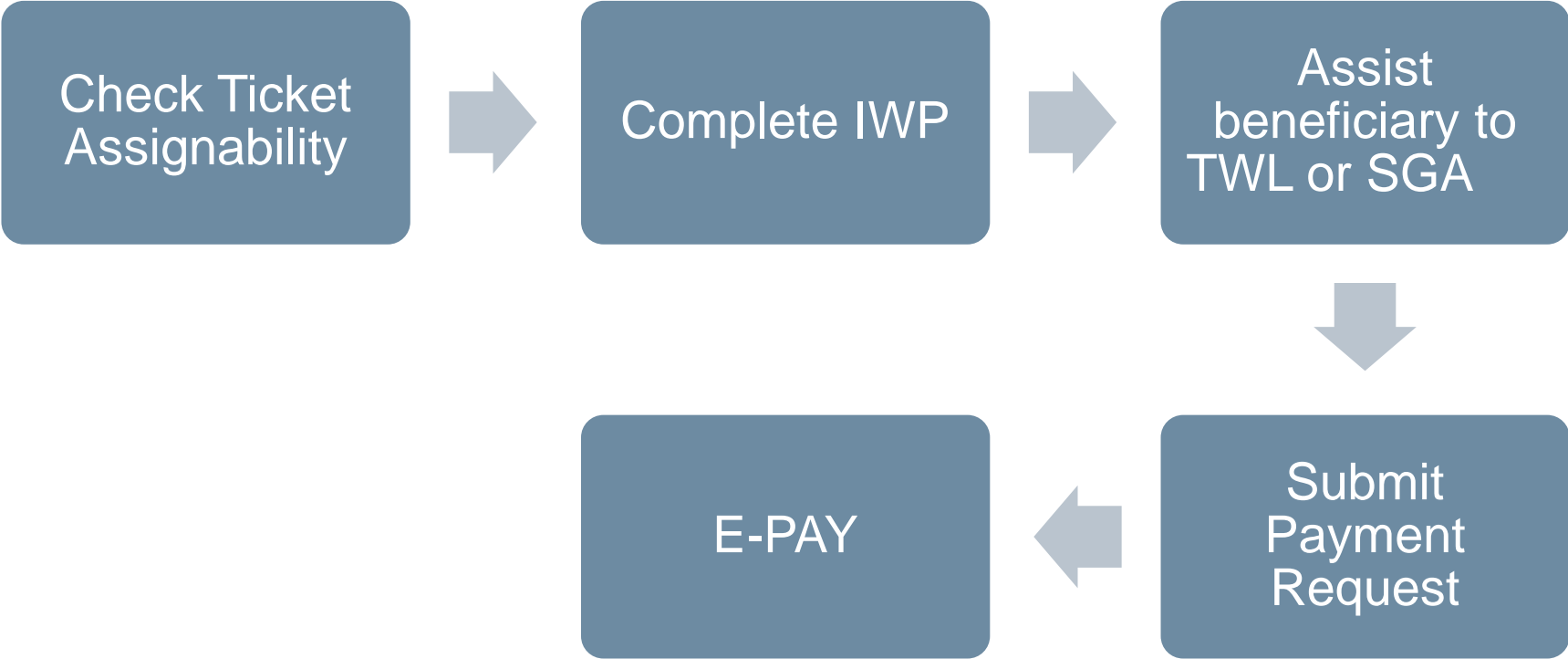
## Content

- Describe the payment process
- Differentiate between Outcome-only and Milestone/Outcome payment methods
- Identify available Phase I Milestone payments using the 18-Month Lookback Tool
- Define exclusions and reconciliation

## Application

- Demonstrate the ability to successfully submit a payment request

# Payment Process



# Payment Methods

# Definition of Terms

## **Trial Work Level (TWL)**

Level of earnings required to earn  
Phase 1 Milestone payments

**2016**

\$810/month

## **Substantial Gainful Activity (SGA)**

Substantial – significant mental or  
physical activity

Gainful – performed for pay or  
profit

**2016**

\$1,130/month non-blind

\$1,820 if blind

# Payment Method Comparisons

## Outcome Only

- EN provides the services needed
- Beneficiary must reach a consistent earnings level of SGA **and** stop receiving Federal cash benefits
- EN can receive Outcome payments

## Milestone/Outcome

- EN provides the services needed
- Beneficiary reaches certain TWL earnings with Federal cash benefits
- Milestone payments while beneficiary receives benefits
- EN can receive Outcome payments

# Outcome-Only Payment Method

- No payments until
  - Beneficiary reaches gross SGA (\$1,130/month non-blind; \$1,820 blind or visually impaired for 2016)
  - Beneficiary stops receiving Federal cash benefits

Payment Type	Beneficiary Earnings Required After Ticket Assignment	SSI Ticket Holder	SSDI Ticket Holder
Outcome	Earnings sufficient for “zero” cash benefits status	Up to 60 payments of \$451/Month	Up to 36 payments of \$781/Month
Total of Outcome Payments Available		<b>\$27,060</b>	<b>\$28,116</b>

# Business Plan Considerations

Outcome Only  Milestone/Outcome



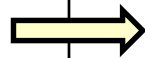
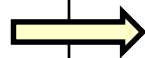




# Milestone/Outcome Payment Method

- Payments can occur while beneficiary continues to receive Federal cash benefits
- Payment types
  - Phase I Milestone
  - Phase II Milestone
  - Outcome

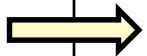
# Phase I Milestones

Milestone	Beneficiary Earnings Required	SSI Ticket Holder Payment	SSDI Ticket Holder Payment
 1	\$810/month for 1 month	\$1,398	\$1,398
 2	\$810/month for 3 of the past 6 months	\$1,398	\$1,398
 3	\$810/month for 6 of the past 12 months	\$1,398	\$1,398
 4	\$810/month for 9 of the past 18 months	\$1,398	\$1,398
	<b>Phase 1 Totals Possible</b>	<b>\$5,592</b>	<b>\$5,592</b>

# Phase II Milestones

- Ticket Holder reaches SGA but still receives Federal cash benefits
- Based on single calendar months

Milestone	Beneficiary Earnings Required	SSI Ticket Holder Payment	SSDI Ticket Holder Payment
1	Gross earnings at or above \$1,130/month non-blind OR gross earnings at or above \$1,820/month for blind	\$242/month up to 18 months	\$419/month up to 11 months
	<b>Total Phase 2 Milestone Payments Possible</b>	<b>\$4,356</b>	<b>\$4,609</b>



# Outcome Payments

- Zero Federal cash benefit status

Beneficiary Earnings Required	SSI Ticket Holder Payment	SSDI Ticket Holder Payment
Gross earnings at or above \$1,130/month non-blind OR Gross earnings at or above \$1,820/month for blind AND Zero Cash Benefits	\$242/month up to 60 months	\$419/month up to 36 months
<b>Total Outcome Payments Possible</b>	<b>\$14,520</b>	<b>\$15,084</b>

# Prior Earnings Rule

# Prior Earnings Rule Defined



# Prior Earnings Rule Conditions

- TWL or above
- Between Date of Disability Onset and Ticket
- Maximum 18-month period

# Phase 1 Milestone 1 Payment



Earnings month



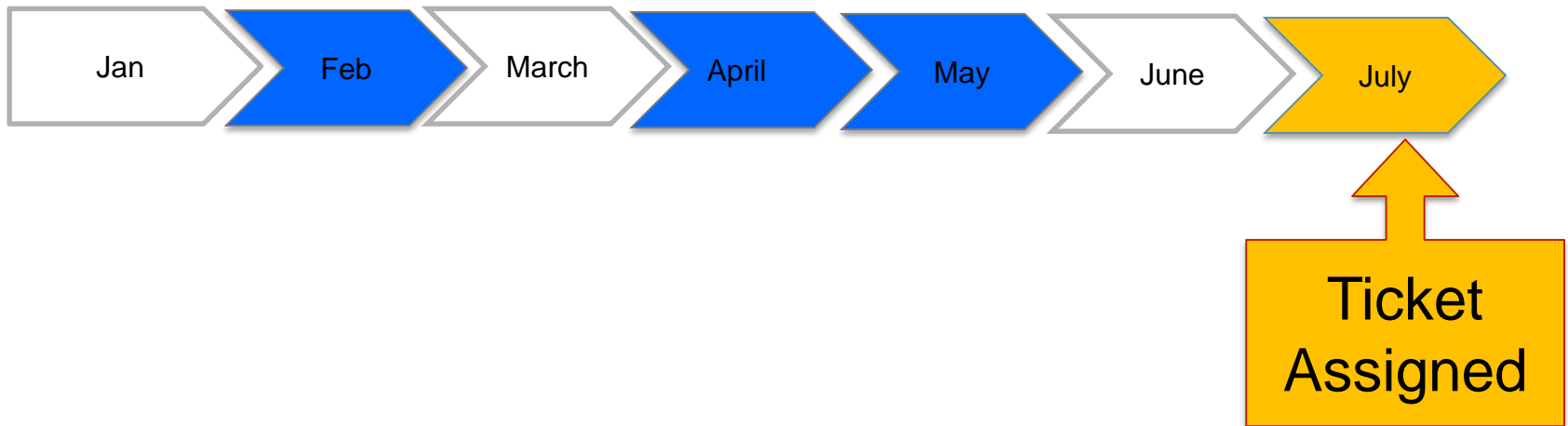
Ticket Assignment Month

EN cannot receive Phase 1 Milestone 1 payment



# Phase 1 Milestone 2 Payment

- EN cannot receive Phase 1 Milestone 2 payment
- EN received three months of trial work level prior to ticket being assigned



# Phase 1 Milestone 3 Payment

**12**  
**months**



**6** Earnings  
months

Ticket  
Assignment  
Month

EN cannot receive Phase 1 Milestone 3 payment

# Phase 1 Milestone 4 Payment

**18**  
**months**

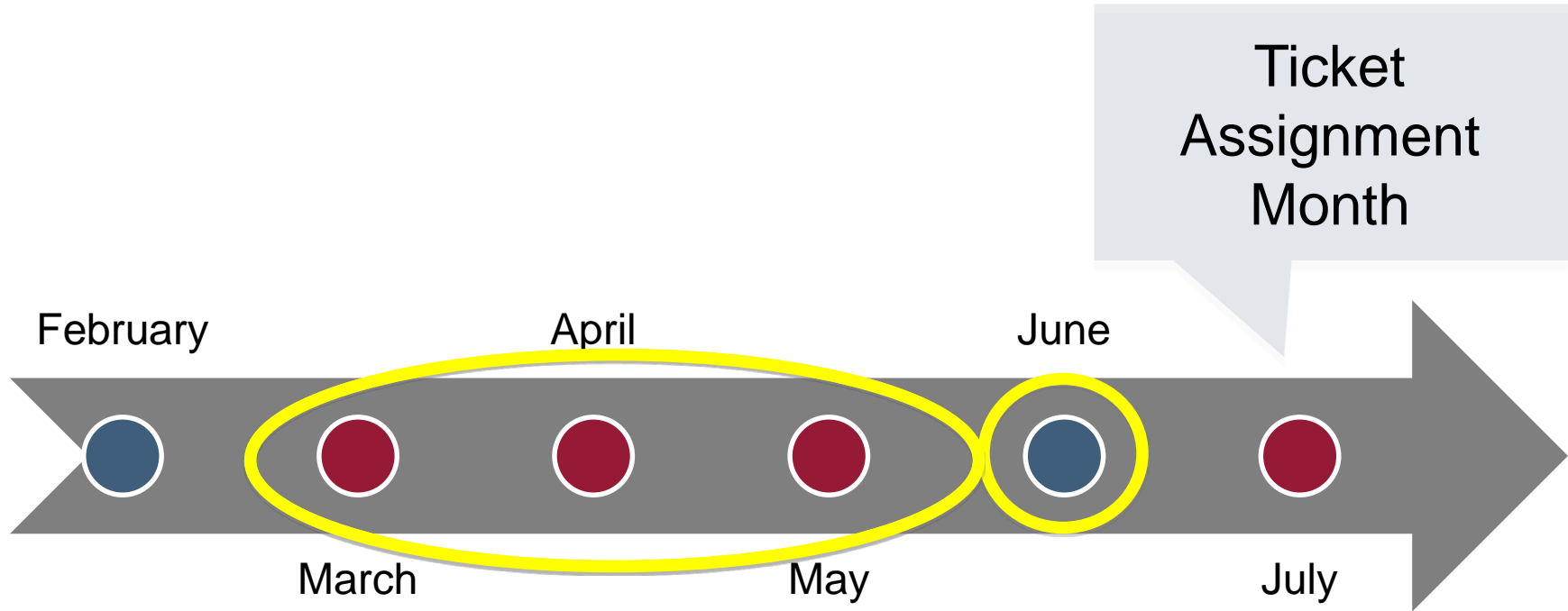


**9** Earnings  
months

Ticket  
Assignment  
Month

EN cannot receive Phase 1 Milestone 4 payment

# Criterion are applied independently



Milestone 1 is available  
Milestone 2 is not

# 18-Month Lookback Tool

# 18 Month Lookback Tool Web Access



### Stay Connected

Connect with us on Social Media! Ticket to Work is on Facebook, Twitter, LinkedIn and YouTube. Follow us to get the latest updates from the Operations Support Manager.

for a beneficiary to join the Ticket to Work program.

Learn more about how you can comply with the law in our dedicated Section 503 section of the website.




About Ticket to Work | Employment Networks | Program Operations | Vocational Rehabilitation | Information Center | Related Resources

TTW / Information Center

Calendar of Events  
Training  
Resource Documents  
Forms  
Events Archive

## Information Center

Welcome to the Information Center, your one-stop maintain your operations as an Employment Network (VR) agency or VREN under the Social Security Act. You are encouraged to use the Information Center events, and updated forms and other documents to understand all aspects of the Ticket program from

Also in this area of the website, is the Events Archive past events, transcripts and presentations.

TTW / Information Center / Forms

Calendar of Events  
Training  
Resource Documents  
Forms  
Events Archive

## Forms

Current Employment Networks (EN) and State Vocational Rehabilitation (VR) Agencies will need to submit various forms to the Social Security Administration and the Operations Support Manager. **Most of the forms listed below can be completed in the Secure Provider Portal.** Exceptions to this are the Split Payment Request and Individual Work Plan. These must be downloaded, printed, signed and sent to the Operations Support Manager. For questions about a specific form, use the contact information located on the form.

### Maintenance

- Form 1374: EN Change Form (PDF)
- EN Change Form (Section Three) (DOC)
- EN Termination Form (PDF) (DOC)
- Beneficiary Referral CD Request Form (PDF)

### Ticket Assignment

- Form 1370: Individual Work Plan (PDF)
- Ticket Assignment Request (PDF)

### Payments

- Form 1368: Self Employment Income (SEI) Form (PDF)
- Form 1369: Universal Auto Pay (UAP) Request Form (PDF)
- Form 1373: FN Supplemental Earnings Statement (PDF)





# Enter the Ticket Assignment Date

## 18 Month Prior Earnings Look-Back Worksheet

EN Name: \_\_\_\_\_ Beneficiary's Name: \_\_\_\_\_  
 EIN: \_\_\_\_\_ SSN: \_\_\_\_\_

Enter the Ticket Assignment Date

MILESTONE 4																			
MILESTONE 3												MILESTONE 2						MILESTONE 1	
Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Jan-13	
																			Enter an X below each month with earnings above the Trial Work amount for that year

Enter Ticket Assignment Date in Red Box Below MM/YYYY

Milestone	Eligible?
Phase 1, MS 1	Yes
Phase 1, MS 2	Yes
Phase 1, MS 3	Yes
Phase 1, MS 4	Yes

TWL Amounts	
2008	\$670
2009	\$700
2010	\$720
2011	\$720

EN Signature \_\_\_\_\_ Date \_\_\_\_\_

# Enter an X

## 18 Month Prior Earnings Look-Back Worksheet

EN Name: \_\_\_\_\_ Beneficiary's Name: \_\_\_\_\_  
 EIN: \_\_\_\_\_ SSN: \_\_\_\_\_

MILESTONE 4																		Enter Ticket Assignment Date in Red Box Below MM/YYYY	
MILESTONE 3												MILESTONE 2							MILESTONE 1
Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12		Jan-13
			X		X		X			X			X		X		X		

Enter an X below each month with earnings above the Trial Work amount for that year

Milestone	Eligible?
Phase 1, MS 1	No
Phase 1, MS 2	No
Phase 1, MS 3	Yes
Phase 1, MS 4	Yes

TWL Amounts	
2008	\$670
2009	\$700
2010	\$720
2011	\$720

Enter an X for every month TWL or above was earned

EN Signature \_\_\_\_\_ Date \_\_\_\_\_



# Display Available Milestone Payments

## 18 Month Prior Earnings Look-Back Worksheet

EN Name: \_\_\_\_\_ Beneficiary's Name: \_\_\_\_\_  
 EIN: \_\_\_\_\_ SSN: \_\_\_\_\_

MILESTONE 4														Enter Ticket Assignment Date in Red Box Below MM/YYYY					
MILESTONE 3												MILESTONE 2			MILESTONE 1				
Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12			Sep-12	Oct-12	Nov-12	Dec-12
															Jan-13				
																			Enter an X below each month with earnings above the Trial Work amount for that year

Available Milestone payments are shown

Milestone	Eligible?
Phase 1, MS 1	No
Phase 1, MS 2	No
Phase 1, MS 3	Yes
Phase 1, MS 4	Yes

TWL Amounts	
2008	\$670
2009	\$700
2010	\$720
2011	\$720

EN Signature \_\_\_\_\_ Date \_\_\_\_\_

# 18 Month Lookback Tool Worksheet

- Ticket assignment date: January 2013
- Above TWL: August, October, and December 2012



## 18 Month Prior Earnings Look-Back Worksheet

EN Name: \_\_\_\_\_ Beneficiary's Name: \_\_\_\_\_  
 DUNS: \_\_\_\_\_ SSN: \_\_\_\_\_

MILESTONE 4															Enter Ticket Assignment Date in Red Box Below MM/YYYY					
MILESTONE 3												MILESTONE 2				MILESTONE 1				
Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12			Oct-12	Nov-12	Dec-12	Jan-13
			X		X		X			X			X				X		X	
Enter an X below each month with earnings above the Trial Work amount for that year																				

Milestone	Eligible?
Phase 1, MS 1	No
Phase 1, MS 2	No
Phase 1, MS 3	Yes
Phase 1, MS 4	Yes

TWL Amounts	
2006	\$620
2007	\$640
2008	\$670
2009	\$700
2010	\$720
2011	\$720
2012	\$720
2013	\$750

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# **Exclusions and Milestone Reconciliation Payments**

# Previous VR involvement?

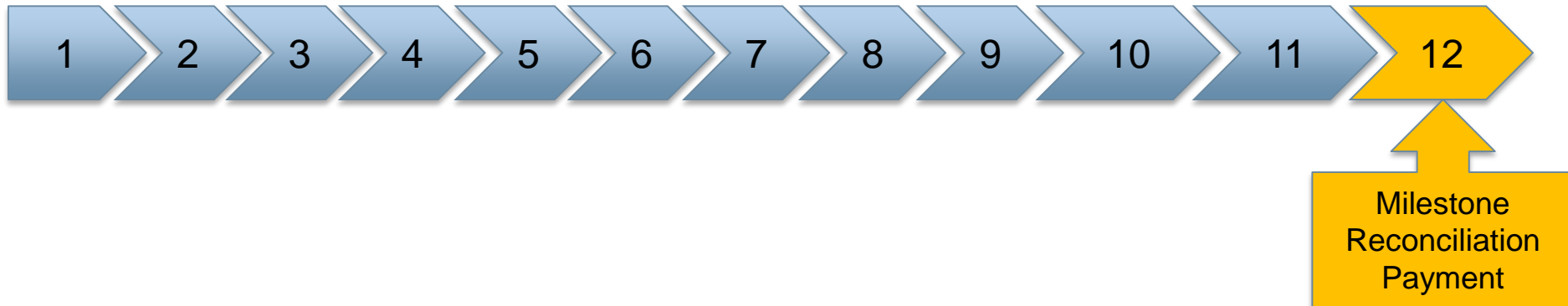
- Case closed successfully → No Phase 1 Milestone Payments



# Milestone Reconciliation Payment

- Beneficiary enters Outcome phase before EN receives their Milestone payments
- Receive Milestone Reconciliation Payment

## Outcome Payments



# Thank You

Please visit [www.yourtickettowork.com](http://www.yourtickettowork.com) or contact [ENPaymentshelpdesk@yourtickettowork.com](mailto:ENPaymentshelpdesk@yourtickettowork.com) with any payments related questions.