

# Ticket to Work: Timely Progress & Other Benefit Things Webinar Transcript

SARAH LYNGDAL: Hello, and thank you for joining me for today's training on Ticket to Work, Timely Progress and Other Benefit Things. My name is Sarah Lyngdal. And I'm the Ticket to Work Program manager at ERI Employment Resources Incorporated.

I have been working in ERI's Ticket to Work Program as a benefits counselor and career counselor for just over 11 years and have a lot of knowledge related to substantial work, disability benefits, and health insurance. And my hope today is, whether you are a new benefits counselor or a seasoned bounce back, there will be some nuggets you can take away from today's training.

Here's the roadmap of what we're going to talk about today. After this training, you'll be able to explain the Ticket to Work Program, what is it, who's eligible, how does it work? You'll be able to recognize when you're working with someone who is a good ticket candidate, and how they would benefit from the program.

You'll understand more about Partnership Plus, what is that collaboration between DVR and employment networks and how does it work. You'll understand more about employment network services and how to find employment networks, describe timely progress reviews and their impact on medical review protection, and then lastly, identify when somebody you're working with is contacted regarding the Ticket to Work Program, who might be contacting them, through what method, and for what reason?

Getting into the very basics, what is the Ticket to Work Program? It's a free and voluntary Social Security program with the goal of self-sufficiency, individuals working at a level where they would be working off cash benefits. Who is eligible for the Ticket to Work Program? Individuals getting SSDI or SSI who are between the ages of 18 and 64 are deemed s. Individuals must be receiving disability benefits as an adult. So somebody who is 18 needs to have gone through an age 18 re-determination and gotten approved for benefits as an adult.

There is no physical ticket for the Ticket to Work Program. The ticket is tied to the person's Social Security number. And there's an asterisk, as you might notice on 64. For individuals who are 64 years old getting SSDI, if they assign their ticket while they're 64 before they turn 65, they can use their ticket until they reach their full retirement age.

How does the ticket program work? Individuals have two options for services. They can work with the state vocational rehabilitation agency. In Wisconsin, this is known as DVR. And while somebody is using their ticket with DVR, their ticket is considered in-use. Or they can work within Employment Network. And while they're working with an employment network, their ticket is assigned.

An individual can work with DVR or an EN but not both at the same time. In many instances, individuals will begin using their ticket with DVR and get more intensive services like job development, job coaching, education, training, assistive technology and then transition to an employment network for ongoing benefits counseling, job retention, and career advancement.

What are Employment Networks? They're public or private organizations contracted by Social Security to provide employment services in the Ticket to Work Program. This could be nonprofit organizations, for-profit agencies, large and small organizations, center for independent living. And then some job centers operate as Workforce. ENs.

ENs vary in the services offered. Some provide benefits counseling. Others do not. There is some variance in the way in which the services are delivered. Some provide services in person, virtual, a combination of the two. There is variety in the quality of services offered. And part of that is the number of people served.

Agencies that are just starting out as ENs might have zero to just a few tickets assigned. And there are employment networks that have upwards of 10,000 individuals that they're serving. There are specialization areas in terms of population served. Some employment networks specialize in serving veterans, the deaf or hard of hearing, as well as individuals pursuing self-employment.

And then lastly, the areas that employment network serves-- some serve just a few counties within their state. Others are statewide providers, a multi-state employment networks or regional organizations, and then lastly national, serving all areas of the states.

I already covered who's eligible for the program. But it's important that there are some instances where somebody can use their ticket with an employment network. So this is just for ticket use within employment network. And for someone's ticket to be assignable, being able to use it, they have to be either in current pay status for SSI or SSDI or within 90 days of DVR case closure or EN assignment.

Individuals can use their ticket with DVR at any point in time. They're not restricted like they are with the use with an employment network. That also means that if somebody returns to DVR for services and then their DVR case closes again, they get another 90-day extension period to assign to an employment network.

Outside of current pay status, or being within 90 days of DVR case closure or on EN on assignment, someone might have a ticket. But it's not assignable. That's an important differentiation to make.

Some state vocational rehabilitation agencies have what are called Partnership Plus Agreements with some employment networks. Not all employment networks are Partnership Plus Employment Networks. And not all states have Partnership Plus. But it is an agreement between the state VR agency and employment networks about who is going to hold the ticketholder and when, and the coordination of services. And the goal is for an individual who is a good ticket candidate to use their ticket with DVR and then transition to an employment network within 90 days of their VR case closing.

The best practice is for VR counselors, for benefits counselors, to introduce the idea of ticket and revisit it often. Individuals really benefit from being connected with an agency once their VR case closes. And that's for benefits counseling. That's for job retention. If a job doesn't work out and the individual wants to pursue other employment, they're already connected with an agency that can jump right in and help them with their job search.

And the Ticket to Work Program counts a successful handoff when the ticketholder assigns their ticket to a Partnership Plus Employment Network within 90 days of their VR case closing.

How did ticketholders find employment networks that serve their area? I think the Choose Work website is the easiest route, Choosework.ssa.gov. And I would utilize the Find Help tool. From there, you can select option 2, direct search, enter your zip code, and get a list of employment networks that serve that area. You can further filter by other criterion like services offered, population served, or specializations and the method in which the services are provided.

There's another category that is filterable on the Choose Work website, and that is factors for success. In order for an employment network to claim that they provide benefits counseling, they have to have at least one staff person who is a certified benefits counselor. And that certification can be through Virginia Commonwealth University, VCU, Cornell, or Indiana. And not only does that EN staff person have to complete that training program, get that certification, but they have to complete the continuing education credits to retain that certification. And that's for claiming that EN provides benefits counseling and has a benefits counselor on staff.

Another option for finding employment networks that serve the ticketholders area is contacting the Ticket to Work helpline. And they can provide a list, either by email or in the mail of ENs that serve that person's area.

This is the biggest misconception that people have about the program. So I want to be very clear. The work incentives, the rules about how Social Security benefits are affected by work, are the same whether somebody is using their ticket or not. The differences are that an individual can get additional options for services with employment networks and medical review protection if they're making timely progress. And I'll talk about what timely progress is in just a moment.

What is timely progress? It's a set of educational and earnings goals for each 12-month program participation period. When the ticketholder is using their ticket with an EN and their ticket is assigned, or they're using their ticket with DVR and their ticket is considered in use, the timely progress review clock is rolling. When the ticketholder is not using their ticket, it's not in use, it's not assigned the timely progress review clock stops. And that person also does not have medical review protection.

The exception to this is when somebody is open with DVR and their case closes, or their ticket's unassigned from an EN, they get a 90-day extension period to reassign their ticket to a new employment network. And during that 90-day extension period, they would retain medical review protection if they had it while their ticket was in use or assigned with that agency. Outside of that 90-day window, if their ticket's not being used, they don't have medical review protection.

This slide outlines the timely progress requirements for the first three years of program participation. I've included the POMS reference where you can find this information as well. You can see in the earlier years of program participation, a ticketholder can be making timely progress based on educational attainment, work earnings, or a combination of the two. And Social Security knows that in many instances, a ticketholder will complete an educational program, get a training certification in order to increase their earnings capacity. So it's a measure and a step towards being able to work towards self-sufficiency.

As the ticketholder progresses through the program, we're getting closer to where an individual needs to be earning above the substantial gainful activity amount and have no cash benefits. And that would be year six of program participation. Year seven and year seven plus, individuals need to be earning above SGA with no cash benefits.

To give you some background about timely progress reviews, the Social Security Administration contracts with a Ticket Program Manager, TPM, to actually administer the Ticket to Work Program. In the past, that ticket program manager was Maximus. And currently the ticket program manager is Cognosante.

And what the ticket program manager found back in 2015 is when they were pulling ticketholders for timely progress reviews, they would first see if there were earnings in Social Security system that would be sufficient to pass that ticketholder in that review period that they were in. And if the earnings were in the system, the ticket program manager would automatically pass that ticketholder. They wouldn't get any paperwork about it. They wouldn't have any idea that this happened behind the scenes.

However, if there aren't earnings in the system, if there were not earnings in the system at that time, then the ticket program manager mailed the ticketholder paperwork that asked about their educational and employment earnings in the last 12 months. And what they found was the return rate for that paperwork was not very good. And there were a lot of individuals who were coming due for that review who didn't return the paperwork. And they failed the review because they didn't return the paperwork. And it created a logistical problem for the maintenance of timely progress review, medical review protection.

And because of all of the issues operationally that they experienced with this process, they decided that they were going to put a pause on the reviews, and they would relook at the process that they had and who was involved and how they were obtaining that information about the ticketholder's progress. And because they're not doing these reviews currently, anybody who had used their ticket prior to the moratorium in 2015, they have the same medical review protection status that they would have had at that time.

So if they passed their last review, their timely progress review, they would retain med review protection. If they failed their last timely progress review, they don't have medical review protection. And that said, individuals who are using their ticket for the first time with DVR with an employment network since the moratorium, they would have medical review protection effective the day that they assign their ticket or the date that their work plan was signed with DVR. And they're expected to meet the timely progress requirements for their program participation moving forward to keep that med review protection.

What is the EN's role in timely progress reviews? When we are looking at a ticketholder's assignability, we have a provider portal where we can look up that information and we can tell if the individual has used their ticket in the past with whom they use their ticket. And then if their ticket is currently assignable. We cannot see what the ticketholders timely progress review status is until their ticket is assigned with us. And that is information that we are supposed to be providing guidance to our ticketholders on if they have medical review protection based on their last review and if there are any issues related to their TPR status.

As I mentioned, individuals who had a review back in 2015, they retain that medical review status as of that last review. And there are instances where an individual failed that review, but since that review period, they are now making timely progress. And an employment network is supposed to be identifying where there are issues in somebody's timely progress review status and pursue re-entry in remedying that, if appropriate, or if the ticketholder can meet that progress.

So to give you an example, if a consumer had a timely progress review in 2014, if they were in year two-- just as an example-- they failed that review but now we can tell that they have earnings above the trial work level limit, and they are meeting timely progress as an employment network, we can submit that verification to the ticket program manager and have them be re-entered in medical review protection.

And what's important is not only that the EN is identifying when these issues are coming up, but also counseling individuals about their eligibility for medical review protection moving forward based on their work goals and how much they're earning or what their educational attainment is. The Ticket to Work helpline can look at the ticketholder's timely progress review status. They can identify if they've had a review, what the review period was as far as month date to month date, and what year of participation they were in at that time.

But like I said, as an employment network, I can't see my ticketholder's TPR status until their ticket is actually assigned with us. And another thing I just want to note about this is the process for doing the reviews back in 2015 was not a great process. I probably have insinuated that. But when an individual is supposed to have medical review protection because of their participation, it's not meant to be trickery.

So Social Security doesn't want to initiate a medical review in instances where somebody should have the medical review protection. And there have been instances where I've worked with our area work incentive coordinator at Social Security to actually have medical reviews rescinded if they were inappropriately initiated because of an error in this process.

And so just identifying somebody's progress, if there's an issue with their status in med review protection and then resolving those issues whenever possible, those are key functions as an employment network.

What if the ticketholder is not making timely progress? Well, they would lose medical review protection. And their ticket would be updated and reflected in Social Security system to say that they might be using it, but they don't have medical review protection.

The ticketholder can still work with the employment network they're working with. They can still work with DVR. There's no change to their option for getting services related to timely progress. And it doesn't mean that the ticketholder would have a medical review initiated right away. Their medical review would come due on their normal review cycle.

In some instances, the reviews are already overdue. And like I said, that doesn't necessarily mean that a medical review is going to happen today for that ticketholder. It just means that they don't have medical review protection. And that review can continue if initiated by Social Security.

And then last point about timely progress, if someone's not making timely progress, there is the possibility of pursuing Section 301. And I included in here, the citation for the POMS reference for section 301.

For new ticketholders that have not had a previous timely progress review, they would have medical review protection effective the date that they assign their ticket with an employment network or the date that they sign their work plan with DVR and their ticket is put in use. And in order to maintain medical review protection, they would need to be making timely progress moving forward for their years of program participation.

Some medical review considerations, the first being the timing of medical review initiation and ticket assignment. An individual that has a medical review that is initiated and then they go to assign their ticket, at that point, it's too late. An individual can still use their ticket with an employment network or with DVR. But they wouldn't have protection from that medical review. So the timing is important in terms of when their ticket's assigned and when the medical review is initiated.

Another consideration is for individuals who are on a medical improvement expected review cycle. Work activity at any level in the first 24 months of entitlement can trigger a medical review. And so individuals who are returning to work within two years of entitlement, individuals who are returning to work above SGA, those are certainly individuals who benefit most from participating in the ticket program and getting that medical review protection.

And then lastly, the 90-day extension period of medical review protection between ticket assignments. If the ticketholder has medical review protection while they're working with DVR or working with an EN and their case closes, they retain medical review protection in the 90 days that follow. And then after 90 days, if their ticket's assigned with a new provider, they would obviously still have medical review protection. But if they choose not to use their ticket after that 90-day window passes, they wouldn't have medical review protection.

Because remember, timely progress review clock is ticking when somebody is using their ticket with DVR or an EN. If they're not using their ticket, that clock stops. And they don't have medical review protection.

Social Security made a few changes to the ticket program from a program integrity perspective. And I'm going to talk about three different initiatives that are ongoing. The first being the engagement requirements for two-way communication. As an employment network for individuals I'm working with who are in job search, the expectation is that we would have a minimum of monthly contact.

Once the ticket holder is employed and they're in the retention phase, the expectation is a minimum of quarterly contact. And in the past, it was sufficient that we could reach out to the ticketholder and just document those contact attempts. And that would satisfy the requirement. That is no longer the case.

The communication has to be two-way. It has to be a conversation between the employment network and the ticketholder. And we are required to make a certain number of contact attempts within a certain window of time. And if we can't have two-way communication, then we need to close out and unassign that ticketholder.

And as a result of this engagement requirement for two-way communication, there have been large batches of tickets that have been unassigned from employment networks. Because we haven't been able to get in contact or have that two-way communication.

The second initiative is what Social Security is calling dormant tickets. And this is where individuals have had their tickets assigned to an EN. And the EN has not received a payment for that ticketholder in at least three years. And from Social Security's perspective, they're under the impression that many ticketholders are getting their tickets assigned with an EN and not making progress and still getting medical review protection.

And so SSA wants to see individuals who are assigned to ENs actively pursuing work, actively preparing for work, and making steps towards self-sufficiency. And then the last initiative, which has always been part of the conversation, given that ticket is an outcome-based program, is the appropriateness for the program.

Does the ticketholder have the goal to work? Do they have the goal to work above SGA, even trying to work above SGA? If that is no longer the ticketholder's goal, we would have that conversation determine if they would be better served by a different program and ensure that we are transitioning them out of our Ticket to Work program and to that other program.

One other thing to note, because of the goals of the ticket program being self-sufficiency as an employment network, we're not allowed to help individuals park. And parking is where a ticket holder intentionally earns just under the SGA amount in order to maximize their earnings and retain their cash benefit. And as an EN, we're not allowed to help individuals do that. If there is the need to develop a work incentive with Social Security, like a subsidy or special condition, we would help them with that process, ensure that their record is up to date with Social Security, and then close out their case with us.

I included some information about new tickets. Because we're working with individuals who have successfully worked off benefits. So through the trial work period, through the EPE, past benefit termination, there are instances where an individual needs to pursue getting back on benefits. And their options would be either EXR or reapplication.

And I included some information about what happens to someone's ticket in either of these instances. So while somebody is getting provisional payments, they're still on their first ticket, TW01. Once they are approved for EXR, that first ticket terminates. And they are issued a TW02, a second ticket for the program.

Once somebody is approved for EXR, the rules are a little bit different. They get that initial reinstatement period and then a new set of work incentives after 24 payments. So after 24 payments, they would get a new trial work period, a new EPE, et cetera. In reapplication cases, if an individual is approved, they would get a new ticket right away. And they would get a new set of work incentives right away.

So they would immediately get a new trial work period, a new EPE, et cetera. And we can see in our provider portal when a ticket terminates. There will be a termination date. And we can see if somebody is issued a second ticket, it would show up as a TW02 and a mailed date that ticket holder was informed by notice that they have a new ticket for the Ticket to Work program.

Other instances where a ticket would terminate would be if there's a medical cessation, if an individual is over assets for 12 months for SSI, and then in instances where an individual ages out of the program, if they attain full retirement age, then their ticket would terminate for that reason as well.

Let's talk about some of the marketing and outreach efforts on employment network side and also on Social Security side. And many of these outreaches can be happening simultaneously. And it can be difficult to identify what is the reason somebody is being contacted and by what agency or what provider.

So looking at the marketing program, there are employment networks that are participating in this program where they receive limited ticket holder PII for the purposes of conducting outreach. And that might be first and last names, addresses, email addresses, phone numbers, and the methods that an employment network can use-- calls, texts, emails, mailings-- in order to educate about the program and hopefully be able to enroll some individuals with their employment network.

And there are large and small employment networks that are conducting that outreach, some being just local employment networks, some being national employment networks, doing it in higher volume on a larger scale. There are also instances where ticketholders are receiving notices that their ticket has been unassigned because of those engagement requirements.

Like I mentioned, if their previous EN has made contact attempts to reach them and they haven't been able to solidify or get that two-way communication, then after a certain number of attempts, that employment network has to unassign their ticket. And they would be notified by Social Security that their ticket has been unassigned. And they can select a new provider.

And then the last thing on this page is Social Security's outreach. They're very involved in social media, in blog posts, in WISE webinars. There are a lot of initiatives that Social Security and the ticket program manager are doing to educate and inform beneficiaries about the program. And one of those are what they consider the good news letter.

And that's just a notice that individuals receive that tells them that they're eligible for the Ticket to Work Program. And they can go back to work with the help of an employment network or with DVR. And they receive those notices upon award of benefits. And then at regular intervals at their one, three, and five-year benefit anniversaries.

And then for individuals who are working with DVR whose case is closed with DVR, they will get a letter informing them that their ticket is available to use within employment network. They'll also get a list of Partnership Plus Employment Networks for Wisconsin VR that serve their area. And that would include the name, the contact information for that employment network.

And the goal again for Partnership Plus for those handoffs is for the ticket holder to assign their ticket with a Partnership Plus Employment Network within 90 days of VR case closure. And there's a really good handout that the ticket program put together about working with an EN after VR services have ended. And I'll include that handout with the materials for this presentation.

I am happy to answer any questions you have about the Ticket to Work Program or about individuals who are working above SGA. Like I said, I have a lot of experience helping individuals work off benefits. And with that, a whole category of benefits issues related to individuals who are working off those cash benefits. So feel free to email me or give me a call. I am happy to answer any questions you have. Thanks so much for joining me.