Audio Mode: Use Mic & Speakers

Talking: Suzie Smith

Questions Log

Q: Is there a volume discount?
A: Yes! We will send you more info after the event.

Yes
Leslie Wilson
Leslie Wilson, M.S.
President/CEO
Wilson Resources, Inc.

Joel Middleton
Account Manager
CESSI, Program Manager for Recruitment and Outreach
Webinar Overview

• Provide an overview of the Ticket to Work Program
• Announce and review the NEW Service Provider as an EN Handbook
• Discuss Partnership Plus and highlight the NEW Partnership Plus Online Toolkit
• Discover how to apply to become an EN
• Learn about support and training opportunities for all ENs
What is the Ticket to Work Program?

- A voluntary employment program administered by SSA
- Offers beneficiaries receiving Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) cash benefits based on disability increased choices for obtaining services & supports to achieve their employment goals
- Rather than reimbursing Employment Networks (ENs) for the cost of services provided, the Ticket program is an outcome-based program that provides payments to ENs as the Ticket Holders they serve attain designated earnings’ Milestones and Outcomes in moving toward self-supporting employment
- Ultimate goal: Reduce reliance on Social Security disability benefits, increase self-sufficiency, and improve the quality of life for beneficiaries
Ticket Holders received a paper ticket in the mail but do not need it for assignment. They can choose:

- Whether to use their Tickets
- When to use their Tickets
- Where to seek assistance:
  - State VR agency
  - Employment Network
Key Features of Interest to Beneficiaries

- Voluntary and free to the beneficiary
- Can postpone regularly scheduled medical Continuing Disability Reviews (CDRs)
- Medicare & Medicaid can continue
- If the beneficiary stops working, there is an expedited reinstatement to benefits

www.socialsecurity.gov/redbook
What are Employment Networks (ENs)

- ENs are approved by SSA to provide services and supports to Ticket Holders.
- SSA pays the EN based upon the beneficiary attaining specific Milestones and Outcomes related to work and earnings (not fee-for-service).
- ENs can be private (for profit & non-profit) organizations, government agencies, employers and other service providers that offer education, job training and employment services (Federal agencies are not eligible).
About Employment Networks (ENs)

• ENs are approved by SSA to provide services and supports to Ticket Holders
• SSA pays the EN based upon the beneficiary attaining specific Milestones and Outcomes related to work and earnings (not fee-for-service)
• ENs can be private (for profit & non-profit) organizations, government agencies, employers and other service providers that offer education, job training and employment services
Examples of Services and Supports ENs May Provide

- Counseling/guidance
- Education/training (vocational/technical/postsecondary)
- Job search/job placement services
- Job coaching/ongoing support services
- Work adjustment counseling
- Job retention services
- On-the-job training
- Other supports and services as spelled out in the IWP
Each approved EN must choose a Ticket payment system

(2 options)

- **Outcome Payment System**
  EN receives payments when Ticket Holder’s earnings exceed the applicable SGA level and beneficiary is in zero cash benefit status

- **Outcome-Milestone Payment System**
  EN receives payments when Ticket Holder achieves designated Milestones and Outcomes in moving towards self-supporting employment
EN Payment Systems

• Election must be made when EN signs an agreement with SSA

• Once a calendar year, an EN can change its elected payment system

• Each beneficiary must remain under the payment system that was in effect for the EN when the Individual Work Plan (IWP) was signed
ENs Can Also Choose…

• What services they provide
  > SSA does not dictate what services and supports an EN must provide

• Who they serve
  > An EN can refuse Ticket assignments
  > Goal is a good match between what the Ticket Holder needs and what the EN has to offer
New Regulations: Underlying Principles

• Mix of benefit payments & earnings to encourage Ticket Holders to “try work”
• Acknowledgement that self-sufficiency is an incremental, multi-step process
• Part-time work is a good start
• Ongoing supports may be necessary
• Community partnerships are critical and they work!
New TTW Regulation  
(Effective July 21, 2008)

Significant regulatory improvements include:

• Total potential EN payments for SSI and SSDI beneficiaries are almost the same

• ENs earn Milestones earlier, more often, and at a higher rate

• Some Milestone payments based on part-time work

• Milestone payments based on gross earnings encourage use of work incentives
Provides EN payments when a Ticket Holder attains designated Milestones and Outcomes in moving towards self-supporting employment

• ENs earn milestones earlier, more often, and at a higher rate
  > Phase 1 Milestone payments are associated with initial efforts at self-supporting employment
  > Some Milestone payments are based on part-time work
  > Milestone payments based on gross earnings encourage use of work incentives
    -- Phase 1 - Trial Work level earnings ($700 a month in 2009)
    -- Phase 2 – Substantial Gainful Activity level earnings (2009 SGA = $980/non-blind and $1,640/blind beneficiaries)
<table>
<thead>
<tr>
<th>Type</th>
<th>Ticket Holder Gross Earnings</th>
<th>EN Payment (SSDI)</th>
<th>EN Payment (SSI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Milestone 1</td>
<td>$350/mo for 1 calendar month</td>
<td>$1,211</td>
<td>$1,211</td>
</tr>
<tr>
<td>Milestone 2</td>
<td>$700/mo for 3 months w/in 6 months (cumulative)</td>
<td>$1,211</td>
<td>$1,211</td>
</tr>
<tr>
<td>Milestone 3</td>
<td>$700/mo for 6 months w/in 12 months (cumulative)</td>
<td>$1,211</td>
<td>$1,211</td>
</tr>
<tr>
<td>Milestone 4</td>
<td>$700/mo for 9 months w/in 18 months (cumulative)</td>
<td>$1,211</td>
<td>$1,211</td>
</tr>
<tr>
<td>Total Potential Phase I Milestone Payments</td>
<td>$4,844</td>
<td>$4,844</td>
<td></td>
</tr>
</tbody>
</table>
### Phase 2 Milestone Payments
#### 2009 Rates

<table>
<thead>
<tr>
<th>Type</th>
<th>Ticket Holder Gross Earnings</th>
<th>EN Payment (SSDI)</th>
<th>EN Payment (SSI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 2</td>
<td>Gross &gt; SGA ($980/non-blind; $1,640 for blind)</td>
<td>$363/mo. (up to 11 mos.)</td>
<td>$207/mo. (up to 18 mos.)</td>
</tr>
<tr>
<td>Total Phase 2 Payments</td>
<td></td>
<td>$3,993</td>
<td>$3,726</td>
</tr>
<tr>
<td>Total Potential Ticket Payments Phases 1 and 2</td>
<td></td>
<td>$8,837</td>
<td>$8,570</td>
</tr>
</tbody>
</table>
Outcome payments are generated when Ticket Holder’s earnings > SGA level and

• Ticket Holder enters $0 cash benefit status
### Outcome Payments Under Outcome-Milestone Payment System

#### 2009 Rates

<table>
<thead>
<tr>
<th>Type</th>
<th>Ticket Holder Net Earnings</th>
<th>EN Payment (SSDI)</th>
<th>EN Payment (SSI)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outcome Phase</strong></td>
<td>Earnings &gt; SGA ($980/non-blind; $1,640/blind) “AND” 0 cash benefit</td>
<td>$363/mo. for 36 months</td>
<td>$207/mo. for 60 months</td>
</tr>
<tr>
<td><strong>Total Outcome Phase Payments</strong></td>
<td></td>
<td>$13,068</td>
<td>$12,420</td>
</tr>
<tr>
<td><strong>Total Potential Ticket Payments (Phases 1 &amp; 2, and Outcomes)</strong></td>
<td></td>
<td>$21,905</td>
<td>$20,990</td>
</tr>
</tbody>
</table>
Availability of Phase 1 Milestone Payments

• Recent Work Rule - Work at or above applicable Trial Work level earnings ($700 in 2009) within 18 months just “prior to Ticket assignment” can impact EN’s access to Phase 1 Milestone
  – Criteria are patterned after work and earnings criteria used for Phase 1 Milestone payments
  – Does not apply to Tickets assigned prior to July 21, 2008

http://www.yourtickettowork.com/training_2
• Achievement of Milestones must occur after Ticket assignment and before start of the outcome payment period
• For 1st Phase 1 Milestone, if earnings are between $350 and $700, EN may be asked to justify why (e.g., started work middle of month, started with fewer hours, etc.)
• For 4th Phase 1 Milestone, earnings must be above trial work level for 9 out of 18 months and EN has completed at least half of services in IWP
• Actual EN payments depend on a number of variables and may be different for each beneficiary
Other EN Payment Information

- SSA does reconciliation payment after 12th outcome month if any Phase 1 or 2 Milestones are outstanding
- EN requests payment through MAXIMUS or can sign up for Auto-Pay
- Payments are being processed in 30-45 days
Look at the people you served last year and use SSA’s EN Revenue Estimator to determine potential revenue from the Ticket to Work Program.

http://www.cessi.net/en_estimator/

(Actual EN payments depend on a number of variables and may be different for each beneficiary.)
Grow Your Bottom Line - Possibility of generating income in 1st 30 days, and up $4,844 in the first 9 months of Ticket Holder’s employment

Discretionary Funds – For most ENs, there are no rules on use of funds generated

Access to Ticket Holders – over 11,000,000 beneficiaries

Reasons Why – New source of funding that complements other sources

Improvements to Administrative and Billing Processes – CESSI & MAXIMUS

Fewer Service Provision Requirements – Get the person a job and help him/her keep it
• Non-restricted funding that can be used as an employer incentive or to reimburse the employer to provide on-the-job coaching services.

• Employers can also access the Work Opportunity Tax Credit that reduces the federal tax liability by as much as $2,400 in the first year of employment for each “qualified worker”
  -- Ticket Holders are “qualified workers”
EN Capitalization Resources: Generating Start-Up Funds – Government Grants, Foundations and Private Organizations

www.yourtickettowork.com/en_cap_resource
Partnership Plus

A New Service Delivery Model
Special Consideration for State VR Agencies

- State VR Agencies are automatically Employment Networks

- VR Agencies can choose, on a case-by-case basis, whether or not serve a consumer as a “Ticket case” or as a “Cost Reimbursement Case”
If a State VR Agency elects to serve a consumer as an Employment Network, they will follow the same procedures that all other service provider ENs follow when serving Ticket Holders.

- They must complete an IWP for Ticket Assignment
- Any milestone/outcome payments that are not earned by the VR Agency acting as an EN will remain available to an EN that accepts the Ticket after case closure.
Cost Reimbursement

• Under the Partnership Plus Option, State VR Agencies will continue serving consumers exclusively under the traditional Cost Reimbursement Program.
  – To trigger a CR payment, a beneficiary must work 9 months during a 12 month period with earnings above the applicable SGA level after deductions for subsidies and IRWEs – often referred to as SGA plus $200
• When a State VR Agency is serving a consumer who is a Ticket Holder under CR, the consumer’s Ticket can not be assigned to any other EN.

• A Ticket can never be assigned to more than one EN at a time.
As community service providers, your organization may receive case referrals from your State VR Agency under a fee-for-service agreement.

Becoming an Employment Network will not conflict with any existing relationship with your State VR Agency.
• When a State VR Agency serves a consumer under CR and closes that case with the individual employed, an EN can accept the individual’s Ticket to provide follow-along services and begin collecting milestone/outcome payments in Phase 2.
How Does Partnership Plus Work?

Ticket Holder goes to VR and applies for services.

Ticket Holder and VR negotiate IPE. VR notifies MAXIMUS that Ticket Holder will be served under CR. MAXIMUS places Ticket as “in-use SVR” status.

VR provides services & supports outlined in IPE and closes case after Ticket Holder is employed 90 days.

EN provides services as outlined in IWP.

EN Submits for Phase 2 Milestones and Outcome payments based on beneficiary’s earnings.

Beneficiary signs IWP, thereby assigning Ticket to the EN.

EN & beneficiary negotiate an Individualized Work Plan (IWP).

VR submits for Cost Reimbursement when beneficiary achieves 9 months of SGA earnings after deductions.

EN & beneficiary negotiate an Individualized Work Plan (IWP).
Phase 1 Milestones

- Phase 1 milestone/outcome payments are intended to cover the up-front costs of getting an individual employed. When the VR Agency closes a case with the individual employed, Phase 1 milestone payments are unavailable to an EN that accepts a Ticket to provide follow-along supports.
Partnership Plus Options

VR → EN

VR → Employer/EN

EN → VR → EN
What if earnings are below SGA when VR closes the case?

- Ticket Holder seeks VR services.
- VR chooses CR and notifies MAXIMUS.
- Ticket is placed in “in-use SVR status” while VR case is open.
- VR closes case with Ticket Holder employed with earnings below SGA after 90 days.
- Ticket Holder assigns Ticket to an EN.
- Since all Phase 2 Milestone and Outcome payments could potentially be paid to the EN, the EN has a strong incentive to get the beneficiary up to SGA earnings.
- Many cases will reach SGA over time and become reimbursable for VR.
- When the beneficiary’s earnings are above SGA, the EN can provide timely notice and data to VR to submit for CR.
What if?

No Earnings at Closure

- VR serves the Ticket Holder, chooses CR, and closes case with Ticket Holder unemployed.
- Ticket Holder assigns Ticket to an EN.
- The full value of the Ticket is potentially available to the EN. EN has an incentive to get the Ticket Holder working at TW level and eventually to SGA earnings to collect payments.
- Some cases will reach SGA over time and become reimbursable to VR.
- When the Ticket Holder’s earnings are above SGA, the EN can provide timely notice and data to VR to submit for Cost Reimbursement.
Partnership Plus: Benefits to the Beneficiary

• Individualized, sequential services
• Coordinated system of services with increased access to employment supports and other types of supportive services with needs identified by beneficiaries:

  Benefits counseling  Skill building
  Follow along services  Transportation
  Ongoing support services  Job coaching
  Job retention services  Mentoring
Benefits to the Beneficiary (continued)

- Flexibility in employment plan development
- Choice of providers
- Can choose VR for up-front services and EN for longer term supports
- Protection against medical CDRs (In-Use SVR and in-use with an EN)
- Expedited reinstatement to benefits is a Ticket Holder loses his/her job due to the disability
Partnership Plus: Benefits to ENs

- Increased collaboration/communication
- Flexible program services and supports
- For most ENs, Ticket payments are unrestricted funds which can be used to support/expand the infrastructure of service providers in the state
- Can work with a Ticket Holder during a single time period or during multiple time periods
  > EN – VR – EN
- Does not interfere with EN providing services under a fee-for-service agreement with VR while the VR case is open and later functioning as an EN for the same Ticket Holder
  > VR – CRP/FFS Agreement – VR closure – CRP/EN
  > SSA does not considered this double dipping
Partnership Plus: Benefits to VR

- Emphasizes collaborative relationships by encouraging partnerships, instead of competition, between VR agencies and ENs.
- VR does not have to complete the SSA 1365 for CR cases – Must notify MAXIMUS of date beneficiary signs IPE.
- Increases choice for consumers to accessing long-term employment supports.
- Focused on long-term competitive employment.
- Strengthens all partners in the system.
Benefits to Both VR and ENs

• Assist beneficiaries to maintain and advance in employment
• Potential to increase funding system-wide
  > Increases Cost Reimbursement program income for VR
  > Increases Milestone and Outcome payments to ENs
• Opportunity to minimize/share administrative tasks associated with tracking work and earnings, and submitting for payments from SSA
Announcing the New Partnership Plus Toolkit!

http://PartnershipPlus.cessi.net

- Please visit the new online Partnership Plus Toolkit to learn of the many benefits of the Partnership Plus option, including how to provide more coordinated services to Ticket Holders and increase Ticket payments and Cost Reimbursement claims. The toolkit features step-by-step guidance on developing and implementing partnerships with community service provider Employment Networks, sample agreements, and other useful tools. This toolkit builds upon the VR Providers Handbook and provides one-stop access to the support needed to be a successful partner under the Ticket to Work Program.
How to Become an EN
EN Request for Proposal (RFP)

- For a copy of the RFP: www.ssa.gov/work/enrfp.html
- Submit completed RFP electronically, ENContracts@ssa.gov, or by fax 410-597-0429
- Questions about the RFP, contact CESSI at: tickettowork@cessi.net
- After approval, CESSI will connect EN to a MAXIMUS Regional Account Representative
Forms and Other Requirements

• Employer Identification Number (EIN)
• Data Universal Numbering System (DUNS) – must be registered on the Central Contractor Registration database - [www.ccr.gov](http://www.ccr.gov)
• Direct Deposit – Complete ACH Vendor/Misc. Payment Enrollment form, requires bank official signature
• General or Professional Liability Insurance – Min. of $500K/occurrence
• Qualifications – Evidence of your organizations’ qualifications to become an EN
A complete RFP package includes:

- Part III, Section 5 H- EN Security & Suitability Forms
- Part IV- EN Proposal Documentation Requirements
  - Section 1, SF 1449
  - Section 2, EN Information Sheet
  - Section 3, Addendum for additional locations, if applicable
  - Section 4, SF 3881, ACH Payment Enrollment Form
  - Section 5, Offeror Reps & Certs
- EN Qualifications Documentation (Part II, Section 1 C)
- EN Liability Insurance Certificate- w/active policy period
Connecting with Beneficiaries

- EN Directory- [www.yourtickettowork.com](http://www.yourtickettowork.com), once approved, the EN will be included, can list website and job positions available...free advertisement!
- Look at those you are already working with
- SSA is doing increased outreach to/education for beneficiaries
  - Work Incentive Seminar Events (WISE): brings together beneficiaries who want to work with local ENs and other community resources
- Receive beneficiary CD from MAXIMUS
  - Requires security clearance
Beneficiary CD – List of all beneficiaries with Tickets available for assignment in the EN’s service delivery area

• Requires a federal security clearance for all employees who will have access to personally identifiable information available on the CD
• Designate a CD Manager who will go through a comprehensive SSA security clearance and suitability determination
• Ticket Holder and EN agree to work together & develop an Individual Work Plan (IWP)
  -- IWP submitted for approval to MAXIMUS
  -- IWP template found at www.yourtickettowork.com
  -- Approved IWP assigns the Ticket to that EN
• EN provides services and supports outlined in IWP
• Ticket Holder goes to work and EN collects evidence of the Ticket Holder’s earnings
• Once Ticket Holder is working at a level that justifies payment to EN, EN submits request for payment to MAXIMUS
• Payments are direct deposited into the EN’s bank account
• EN receives 1099 form from SSA after first of the next tax year, if the organization pays taxes
• Ticket may be unassigned by the Holder or EN – Both situations require a signed letter to MAXIMUS
Technical Assistance Available

- **CESSI:**
  - EN models
  - Training on Ticket
  - EN Application Support

- **MAXIMUS:**
  - Operational and Payment Support –EN Ongoing Support and Training- MAXIMUS
  - Ticket Training CD
  - Notes Field
  - Beneficiary Referral List CD
  - EN-Vocational Rehabilitation Training Queue
SSA Services and Supports

• To become an EN, contact CESSI, the Program Manager for Recruitment and Outreach, at 1-877-743-8237
  – Participate in an EN Application Walk-through Teleconference (E-Mail application@cessi.net or visit http://www.cessi.net/ttw/walkthru-app.html)
  – Receive one-on-one assistance from Account Managers

• After becoming an EN, contact MAXIMUS, the Operations Support Manager, at 1-866-949-ENVR (3687)
  – Receive training and start-up guidance (Ticket Training Tuesday)
  – Check on beneficiaries with Tickets available for assignment
  – Enhanced online directory of ENs
  – Website – www.yourtickettowork.com
For More Information

Visit the following web sites:

• SSA’s Work Site:  www.socialsecurity.gov/work

• CESSI:  www.cessi.net/ttw

• MAXIMUS:  www.yourtickettowork.com

• Submit questions about the NEW Ticket to Work Program to: TicketProgram@ssa.gov
• Leslie Wilson
  Wilson Resources, Inc.
  CESSI Ticket to Work Program Consultant
  Phone: (850) 386-2022
  Email: lesliew@wilres.com

• Joel Middleton, Account Manager
  CESSI, Program Manager for Recruitment & Outreach
  Phone: (703) 448-6155 ext. 223
  Email: jmiddleton@cessi.net