

# Ticket to Work and Partnership Plus for Consumers Receiving SSI or SSDI

Revised January 2020

## Purpose

To outline the role of DVR staff throughout the DVR case process when working with consumers who receive Social Security benefits and may be eligible for Ticket to Work (TTW) or Partnership Plus services before DVR case closure. The goal of consumer participation in TTW is to help the consumer find and maintain a job above Substantial Gainful Activity (SGA), thus working off benefits. In 2019, SGA was calculated at \$1,220 per month.

These steps will assist consumers in making informed choices about working off benefits (using their Ticket) and how they would like to use their Ticket upon DVR case closure.

## Rationale

DVR staff at all levels have an opportunity to assist eligible individuals with disabilities in finding and maintaining competitive integrated employment.

DVR can help maximize a consumer's earnings and career potential through Social Security work incentive programs like TTW and Partnership Plus. Staff should remind consumers that there are supports and services available after DVR services end to continue to assist them toward working off benefits.

## Background Information

Ticket to Work (TTW) is a work incentive program that provides a path for Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) recipients to receive support from state VR agencies and providers known as Employment Networks (ENs).

An update to TTW legislation created a program known as Partnership Plus, which provides financial incentives to VR agencies and ENs to work together to provide seamless support for mutual consumers and beneficiaries as they exit VR programs. The goal of the TTW and Partnership Plus programs is to give consumers the resources, tools, and coordinated services they need to successfully work off Social Security benefits.

## Ten Things to Know about Ticket to Work

1. Ticket to Work (TTW) is a free and voluntary program created by Social Security. It is important that the consumer understands that the goal of TTW is to work off benefits.
2. Most consumers who are receiving SSI or SSDI have a TTW. Consumers may not realize they have a TTW.
3. No one is required to participate in TTW or Partnership Plus to keep their benefits. Consumer benefits are not impacted by choosing not to participate in these programs.
4. Consumer benefits after DVR case closure include:
  - a. Connection to an EN that can provide services and supports for up to 5 years
  - b. Services to help maintain, regain, and advance in employment
  - c. Potential eligibility for protection from Continuing Disability Reviews (CDRs)
5. The Ticket is connected to the consumer's Social Security Number (SSN). Those who decide to use their Ticket with DVR will receive a letter from Social Security confirming that the Ticket has been put in use with DVR.
6. Consumers who work with an EN after VR closure are almost twice as likely to achieve successful work outcomes!
7. VRCs must offer benefits counseling to all SSI/SSDI beneficiaries. Benefits counseling provides the consumer with information about TTW and other work incentives that may be used while working and helps with informed choice.
8. Partnership Plus is most appropriate for consumers who intend to work off SSI or SSDI benefits. Following DVR case closure, consumers earning near or above SGA should be strongly encouraged to use their TTW with a Partnership Plus EN to receive extra supports.
9. The DVR case closure letter outlines how consumers can reassign their TTW and access ENs in Wisconsin, including Partnership Plus networks. VRCs can help the consumer exercise their informed choice in selecting a Partnership Plus EN.
10. For more information:
  - a. TTW is managed by the Ticket Program Manager, Maximus, Inc. If consumers have questions about using their Ticket with DVR or an EN they can contact the Social Security Ticket Specialist or the Ticket to Work Help Line at 866-968-7842 or 866-833-2967 (TTY) Monday through Friday 8 a.m. to 8 p.m. EST.
  - b. For general inquiries, you or the consumer may visit <https://choosework.ssa.gov/>.

## Case Process Responsibilities

**It is essential that DVR obtain accurate SSNs from DVR consumers.** Please refer to the [SSN Requirements guidance](#) for responsibilities in obtaining accurate SSNs.

Throughout the case process, DVR staff should assist consumers who are receiving Social Security benefits (due to their own disability) and are interested in working off benefits.

### Application, Eligibility, and Waitlist

If a DVR consumer is working with an EN, determine which of the three scenarios in the table below applies to the consumer and proceed as indicated. If the consumer was not working with an EN before applying for DVR services and was not working with an EN before coming off the DVR waiting list, proceed to the IPE Development section.

Process	Consumer Action Needed	DVR Staff Action Needed
<b>Orientation</b>	Consumer attends DVR Orientation	DVR Staff assist consumer through group, individual in-person, or individual phone orientation to DVR services
<b>Application &amp; Eligibility</b>	Consumer makes informed decision to complete the DVR application and signs ROIs for records, including Individual Work Plan (IWP) from the EN, if appropriate	<ol style="list-style-type: none"> <li>1. Staff accepts the referral/application</li> <li>2. Intake with consumer via phone or in person via SVRI</li> <li>3. Staff identifies SSI/SSDI beneficiaries in Federal Requirements</li> <li>4. Staff verifies SSI/SSDI benefit status and checks the SSN Verification History Page</li> <li>5. If the consumer provides their SSN and verification shows they are receiving Social Security benefits based on their own disability, staff completes presumptive eligibility as soon as possible (SSI or SSDI, including Disabled Adult Child) based on the consumer's disability</li> </ol>
<b>OOS Waiting List</b> (if in use)	Consumer can reach out to a Partnership Plus EN while on the DVR waiting list to begin receiving employment supports and services prior to coming off the waiting list	<ol style="list-style-type: none"> <li>1. Staff discusses the benefits of working with an EN while on the waiting list with the applicant</li> <li>2. Staff sends applicant an OOS Eligibility/Referral Letter which includes the <a href="#">Your Ticket to Work Services</a> insert</li> </ol>

## Activation from Waitlist

If the consumer was not working with an EN before applying for DVR services and was not working with an EN before coming off the DVR waiting list, proceed to the IPE Development section.

If a DVR consumer is working with an EN, determine which of the three scenarios in the table below applies to the consumer and proceed as indicated.

Scenario	DVR Consumer Actions	DVR Staff Actions
The EN services are meeting the consumer's needs (no longer interested in DVR services)	Let DVR staff know that they do not wish to use DVR services	The DVR case file can be closed with a closure reason of "Does not require VR services"
The consumer wants to work with DVR	<ol style="list-style-type: none"> <li>1. If already working with an EN, the consumer calls the Ticket Program Manager (Maximus) at 866-968-7842 or 866-833-2967 (TTY) to unassign the Ticket from the EN</li> <li>2. The consumer can choose to use the EN as a service provider for job development or they can choose another service provider</li> </ol>	<ol style="list-style-type: none"> <li>1. Assist the consumer with unassigning their Ticket from the EN</li> <li>2. Provide informed choice to the consumer regarding job developer selection (this may include the EN if they are a DVR service provider)</li> </ol>
The consumer decides to maintain the Ticket assignment with the EN while being served by DVR	<ol style="list-style-type: none"> <li>1. In most circumstances, the ticket cannot be assigned to an EN while the DVR case is open</li> </ol>	<ol style="list-style-type: none"> <li>1. In these rare cases, DVR and the EN must coordinate the IPE and IWP services</li> <li>2. The IWP services must be identified in the IPE as comparable benefits and entered as comparable benefit case notes in IRIS</li> <li>3. DVR expects the EN to provide services at no cost to DVR</li> </ol>

**Note:** The Ticket belongs to the consumer, and assignment of the Ticket remains the choice of the consumer. If a consumer is unsure if their Ticket is assigned to an EN, DVR can contact Maximus to check the Ticket status. DVR may not provide services that are being provided under an Individual Work Plan (IWP).

## Individualized Plan for Employment (IPE) Development

During the initial IPE development phase and throughout the DVR process, VRCs should discuss with the consumer the benefits of putting their TTW in use with DVR. The Ticket is placed "In Use – SVR" in the month following the creation and signing of the initial IPE.

The benefits of placing the TTW with DVR as part of Partnership Plus include better coordination for Work Incentive Benefits Analysis and related services and easier referral to an EN if the consumer earns near or above SGA at DVR case closure.

**Note:** The Social Security Ticket Specialist will place the Ticket "In-Use" with DVR and reflect this on the Case Summary - Social Security tab at the beginning of the month after the initial IPE is signed.

Process	DVR Consumer Actions	DVR Staff Actions
IPE Development through employment	<ol style="list-style-type: none"> <li>1. Actively participate in creating the IPE</li> <li>2. Ask any questions and discuss any concerns regarding DVR or Social Security benefits and earnings</li> <li>3. Respond to Social Security timely progress reviews, continuing disability reviews, and other requests from Social Security as they arise</li> <li>4. Participate in benefits counseling sessions and learn how working will impact Social Security benefits</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop the IPE, which may include services such as training or post-secondary education leading to a credential or measurable skills gain, as appropriate</li> <li>2. Discuss the benefits of an employment goal that can lead to independence and economic self-sufficiency</li> <li>3. Refer consumers for Work Incentive Benefits Analysis – see <a href="#">Benefits Analysis Technical Specifications</a></li> <li>4. Discuss the TTW program, its benefits to the consumer, and that the Ticket is placed "In-Use" with DVR when the IPE is signed</li> <li>5. Discuss Social Security's timely progress requirements and how DVR's progress measures can be used to show Social Security whether the consumer is meeting the requirements - see <a href="#">Timely Progress Requirements Tip Sheet</a> for more information</li> </ol>

## While the Consumer is Employed

Once a consumer begins earning wages at or above SGA **or** becomes interested in working toward a job leading to wages at or above SGA while working part-time, VRCs should work with the consumer to determine if Partnership Plus is the right choice for them. VRCs can use the Social Security Administration (SSA) [Find Help](#) tool to help the consumer choose an EN that has a Partnership Plus Agreement with DVR.

Scenario	DVR Consumer Actions	DVR Staff Actions
<p>Consumer is earning at or above SGA</p> <p><u>or</u></p> <p>Consumer is working part-time and is interested in using their Ticket with Partnership Plus to find a job that pays above SGA</p>	<ol style="list-style-type: none"> <li>1. Consumer continues to work at their job and participates in resolution of any issues at work or affecting employment</li> <li>2. If the consumer is interested in having a Work Incentive Benefits Analysis, the consumer should request the service and bring any questions to the meeting with the benefits specialist</li> </ol>	<ol style="list-style-type: none"> <li>1. Provide follow along services for a minimum of 90 days and collect wage documentation to attach to the consumer's case file</li> <li>2. Discuss with the consumer the benefits of conducting a Work Incentive Benefits Analysis to explain how their current job and benefits may be affected</li> <li>3. Benefits counselor shares information on Partnership Plus</li> <li>4. Before case closure, discuss the option and benefits of using Partnership Plus for ongoing job retention services including: <ol style="list-style-type: none"> <li>a. Availability of long-term job retention services through a Partnership Plus EN</li> <li>b. Ongoing services for up to five years to help them maintain, regain, or advance in employment</li> <li>c. Consumer can use Partnership Plus to advance their careers and employment opportunities</li> <li>d. Possible uninterrupted protection from medical Continuing Disability Reviews (CDRs) – consumer can continue protection from CDRs if they assign their TTW within 90 days of DVR case closure</li> </ol> </li> </ol>
<p>Consumer is not interested in using their Ticket with Partnership Plus or another EN and the consumer is not interested in earning above SGA</p>	<ol style="list-style-type: none"> <li>1. Consumer continues to work</li> <li>2. If the consumer is interested in having a Work Incentive Benefits Analysis, the consumer should request the service and bring any questions to the meeting with the benefits specialist</li> </ol>	<ol style="list-style-type: none"> <li>1. Provide follow along services for a minimum of 90 days and collect wage documentation to attach to the consumer's case file</li> <li>2. Discuss with the consumer the benefits of conducting a Work Incentive Benefits Analysis to explain how their current job may affect their benefits</li> <li>3. Benefits counselor shares information on Partnership Plus</li> </ol>

## Case Closure

For consumers earning at or above SGA:

- Provide follow along services for a minimum of 90 days as you would with any other case, collect wage documentation, and attach the documentation to the case file.

- Before case closure, have a discussion with the consumer about Partnership Plus including the benefits to the consumer and availability of long-term job retention services through a Partnership Plus EN.
- If the consumer expresses interest in using Partnership Plus services, staff should help the consumer select their EN like they would with any other vendor. The SSA Ticket to Work [Find Help](#) feature can be a helpful resource to use when counseling the consumer through their options and providing informed choice.
- **Best Practice:** If the consumer is interested in using Partnership Plus, ask the consumer to sign an ROI and invite the Partnership Plus EN of their choice to a meeting to provide a "warm handoff" to the EN. This practice will promote a seamless transition of services from DVR to the EN of the consumer's choice.

For all SSI/SSDI beneficiaries:

- Remind the consumer of the importance of follow along services to maintain employment and the potential benefits of assigning their Ticket to an EN after case closure (see third bullet under Plan Development).
- Send the consumer the appropriate SS Consumer closure letter which includes the [Your Ticket to Work Services](#) insert.
- If the consumer is interested, make a referral back to a previously engaged Partnership Plus EN.

After case closure:

- The closure is electronically reported to the Ticket Program Manager (Maximus). The case will be automatically unassigned from DVR, which can take up to one month after closure.
- The Partnership Plus EN liaison will contact DVR as needed for technical assistance.
- Once referred and EN services begin, the expectation is that the consumer will continue to earn above SGA, work off benefits, and achieve a higher state of financial wellness and independence via TTW and Partnership Plus.
- In cases where wage verification is missing at case closure, DVR Central Office staff are responsible for collecting wage documents from the consumer.
- Staff should continue to attempt to collect wage verification documentation while the case is open.

**Note:** An EN can choose to accept or decline a Ticket assignment.

Please refer any questions to your supervisor or Social Security Ticket Specialist.

## Definitions

### **Continuing Disability Reviews (CDRs)**

Periodic check-ins by Social Security to see if a consumer continues to meet eligibility requirements for SSI/SSDI. These occur on cycles of 3, 5, or 7 years depending on the likelihood that an individual will recover medically.

### **Employment Network (EN)**

Public or private organizations that contract with Social Security to provide job support services to people aged 18 through 64 who receive Social Security disability benefits and are interested in working toward the goal of replacing their benefits with income from a job through the Ticket to Work program.

### **Individual Work Plan (IWP)**

A plan to help a consumer reach their employment goals. An IWP is a required document prepared and signed by the consumer and their EN that shows Social Security that the state VR agency and EN intend to work together. The IWP contains similar information to DVR's Individualized Plan for Employment (IPE).

### **Partnership Plus**

A program that encourages state VR agencies to partner with Employment Networks (ENs) to provide ongoing job support to help TTW program participants maintain employment. Wisconsin's Partnership Plus ENs are preferred partners in helping consumers continue to work off benefits after successful DVR case closure.

### **Social Security Disability Insurance (SSDI)**

A program that pays benefits to individuals, and certain members of their families, who are "insured," meaning that they worked long enough and paid Social Security taxes before becoming unable to work due to disability limitations.

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

A term used by Social Security to refer to the level of work a person can perform, indicated by a dollar amount. When a person engages in work at or above SGA, Social Security uses this as a factor in deciding their eligibility for disability benefits. The Social Security Act specifies a higher SGA amount for statutorily blind individuals. Social Security adjusts SGA amounts annually based on the national average wage index.

### **Supplemental Security Income (SSI)**

A Social Security program that pays benefits to adults and children with disabilities who have limited income and resources.



## **Ticket to Work (TTW)**

A voluntary program for Social Security beneficiaries between the ages of 18 and 64 that provides options for employment services to beneficiaries working toward self-sufficiency and financial independence.

## **Ticket Program Manager (TPM) or Maximus**

Maximus is the contracted agency that manages the Ticket to Work program for the Social Security Administration. Staff and consumers can contact Maximus at 866-968-7842 or 866-833-2967 (TTY) Monday through Friday between 7am and 7pm (EST) for assistance.

## **Timely Progress Reviews (TPRs)**

Social Security will touch base with the consumer and possibly their VR counselor annually while the consumer's Ticket is in use with DVR. The purpose of the TPR is to ensure the consumer is making timely progress toward working off benefits. TPRs can be met by working, attending school, or a combination of work and school attendance. Refer to the [Timely Progress Tip Sheet](#) for further details and benchmarks for meeting Timely Progress with Social Security.

## **Resources**

SSA Choose Work Website

<https://choosework.ssa.gov/index.html>

Find Help (to help a consumer select a Partnership Plus EN or other EN)

<https://choosework.ssa.gov/findhelp/>

Work Incentive Seminar Events (on demand webinars for staff and consumers)

<https://choosework.ssa.gov/webinars-tutorials/webinar-archives/index.html>

Substantial Gainful Activity by Year

[https://www.ssa.gov/oact/cola/sga.html?\\_sm\\_au\\_=iQVSM5PTLF6kf6R6](https://www.ssa.gov/oact/cola/sga.html?_sm_au_=iQVSM5PTLF6kf6R6)

Timely Progress Tip Sheet

<https://www.ssa.gov/pubs/EN-05-10062.pdf>