

Question: What is the CWIC role in advising beneficiaries about timely progress reviews under the Ticket to Work Program?

Beneficiaries are often confused when they receive a timely progress review and related correspondence from SSA. In addition, beneficiaries who have an open case with state Vocational Rehabilitation may not realize that their ticket is considered “in-use SVR”, and that they are subject to timely progress reviews. It is important to have a good understanding of the purpose of timely progress reviews and to be prepared to guide the beneficiary through this process.

What is the process for assigning a ticket?

In general, a beneficiary can assign a ticket to an EN or state VR agency or otherwise use it with a state VR agency if the ticket is valid and the beneficiary is receiving a cash payment. To assign a ticket a beneficiary must first find an EN or state VR agency that is willing to accept it. If the beneficiary decides to accept services from the state VR agency, the agency will decide whether it wants to be paid under the Ticket program or SSA’s VR Reimbursement program. The ticket is not assigned when the VR agency chooses cost reimbursement. It is placed in a status called “In-Use SVR.” The beneficiary will have the same rights and responsibilities when the ticket is assigned and when it is in In-Use SVR status. Most importantly, the VR’s decision regarding their payment option does not affect the beneficiary’s protection from medical CDRs.

Once both parties have agreed, the beneficiary and a representative of the EN must develop and sign an Individualized Work Plan (IWP) to initiate a ticket assignment. If the beneficiary elects to work with his or her state VR agency and the VR agency agrees, at its option, to serve the beneficiary as an EN (rather than through the cost reimbursement option), then the beneficiary and representative of the state VR agency must agree to and sign an Individualized Plan for Employment (IPE). The EN will submit a copy of the signed IWP to the OSM. If a state VR agency is accepting a ticket assignment it will submit a completed and signed SSA-1365 to the Operations Support Manager (OSM i.e., MAXIMUS). As an alternative, the VR agency may submit an IPE with a signed statement on it acknowledging that the beneficiary is assigning the ticket. In addition, there are new requirements that the IWP/IPE/SSA-1365 be accompanied by the beneficiary’s work history for the past 18 months and information describing the services the EN or VR agency will provide by the end of the initial phase of milestone payments. The OSM works individually with the state VR agencies to identify an efficient monthly electronic process to initial In-Use SVR status. The effective date of the ticket assignment will be the first day on which the requirements for ticket eligibility are met and the IWP or IPE/SSA-1365 has been signed.

When is a ticket considered to be “in use?”

SSA defines using a ticket as a specified period of time during which the beneficiary is actively making progress according to SSA’s progress review guidelines to become self-supporting. The EN or state VR agency monitors the beneficiary’s progress, but the OSM actually decides if the beneficiary is making timely progress. SSA cannot initiate a medical CDR while the beneficiary is using the ticket and making timely progress.

How can CWICs verify the status of a Beneficiaries ticket?

In advising beneficiaries about their Ticket to Work and the medical continuing disability review protection, there is some key information you need to verify. You need to confirm when the beneficiary’s ticket was assigned (Month/Year), who their Ticket is currently assigned to, when their last Timely Progress Review occurred, and if their Ticket is considered in “active” status. This information can be verified by contacting the Ticket Call Center at 1-866-968-7842 when the beneficiary is with you (or on conference call).

As an alternative, you can also request one or more of the Ticket Queries from SSA. The Ticket to Work Query (DIBT) provides general information about a beneficiary's current ticket status. The General Ticket Query (TKQY) provides current ticket information including the date the system selected the beneficiary record, the date the system mailed the ticket, and the current status of the ticket. The Ticket Status Range (TKSR) query provides a detailed historical record of ticket activity by EN. The TKSR is a continuation screen of the TKQY. The Ticket Use History (TKUH) query provides a historical record of ticket activity for each beneficiary once the ticket has been assigned to a provider. Details about these queries are available at the following URL: <https://secure.ssa.gov/apps10/poms.nsf/lrx/0455002025>

What does “Timely Progress” mean?

The beneficiary is required to meet specific criteria, as measured during progress reviews, in order to be entitled to protection from a medical CDR as the beneficiary makes progress toward self-supporting employment. MAXIMUS conducts a Timely Progress Review (TPR) on every assigned/in-use Ticket. Timely progress reviews are conducted on each assigned and in-use, and in-use SVR Ticket every 12 months. The requirements for each 12-month progress review periods are outlined in the [CWIC training manual, Module 1](#). (page 25). Beneficiaries who do not meet the timely progress requirements do not lose their right to participate in the Ticket program. They only lose their right to protection from a medical CDR.

When a beneficiary is served by a state VR agency under the cost reimbursement system, their ticket is not assigned to the state VR agency. As mentioned above, it is in a status called In-Use SVR. While the VR case is open, the beneficiary will have protection from a medical CDR under the same rules that apply with an assigned ticket. In-Use SVR status begins on the effective date of the IPE or the first day that a ticket would otherwise have been assignable if services

were provided by a private EN or the state VR agency acting as an EN. All of the progress review criteria will apply when state VR agencies serve beneficiaries under either the cost reimbursement system or as an EN.

Beneficiaries who continue to meet the timely progress requirements will have 90 days following the date the VR agency closes the VR case to assign the ticket to a private EN, if ongoing services are needed and desired. During this 90-day period, beneficiaries will continue to meet the timely progress requirements for the purposes of medical CDR protection. Once the 90-day period ends, beneficiaries who have not assigned their ticket to an EN will not be considered to be using a ticket and will be subject to medical CDRs.

What is the CWICs role in regards to helping beneficiaries with Timely progress reviews?

CWICs have a critically important role in helping beneficiaries understand and utilize the Ticket to Work as part of a holistic strategy for achieving employment and enhancing self-sufficiency. The Ticket to Work is a powerful work incentive for certain individuals, and when applied may make the difference between remaining unemployed or successfully attaining a satisfying career. The CWIC role includes identifying beneficiaries who would be good ticket candidates, and helping them to understand how the Ticket to Work program functions and what benefits individuals receive from using their ticket.

CWICs need to counsel beneficiaries on what constitutes “timely progress” for each 12-month review period in the ticket program. This will vary depending on the amount and type of employment preparation needed to achieve the desired occupational goal. Some beneficiaries will start with a goal of attaining a GED, while other may move directly into paid employment. Still others will pursue various types of post-secondary education or training. The CWIC will have to have a solid understanding of the planned route for achieving employment and will need to counsel on the timely progress requirements applicable to individual beneficiaries.

I have been getting requests from ENs to provide training on the Ticket to work program. Is this part of the CWIC role as well?

The answer to this question is no. CWICs are not required to provide training, technical assistance or other information on EN payment mechanisms under the Ticket Program. ENs with questions about how services are paid for under the Ticket Program should be referred to Maximus. CWICs are also not required to provide intensive training or technical assistance to ENs on SSA benefits and work incentives, except as part of working collaboratively to serve specific beneficiaries who have assigned tickets assigned and in use.

Conclusion

CWICs play an important role in helping beneficiaries to understand and access the Ticket to Work Program, as well as partnering with ENs and VR agencies to help ensure a successful transition to employment for SSA beneficiaries. Timely Progress reviews are an essential

component of the Ticket to Work Program, but may be a confusing aspect of the process for beneficiaries. It is important for CWICs to have a solid understanding of the purpose of timely progress reviews, and to be ready to assist beneficiaries as necessary.