

## Secure Provider Portal

### Accessing the Portal

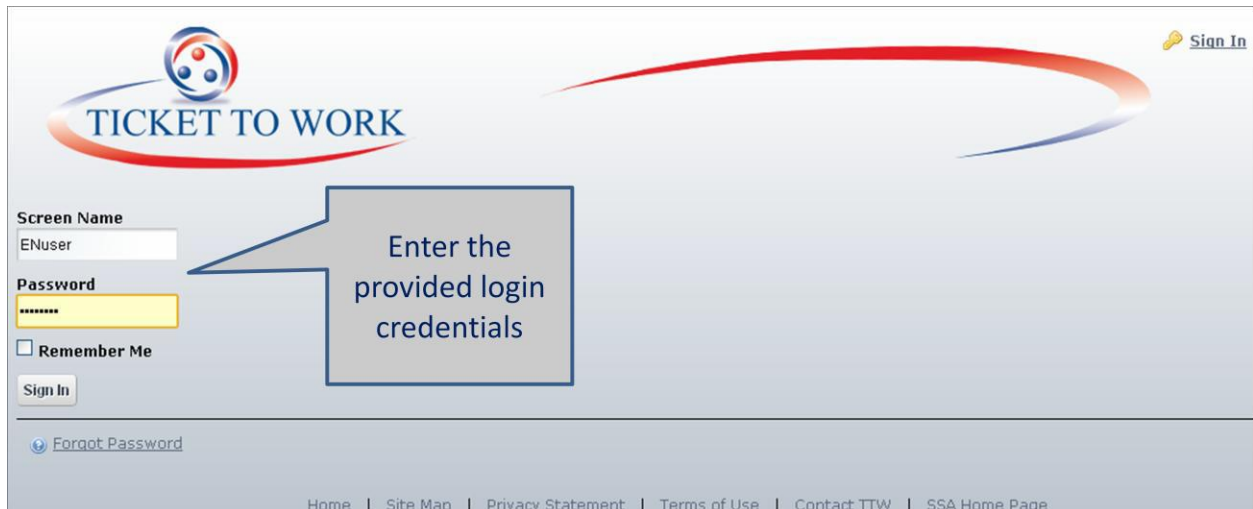
Let's take a look at how the EN portal is accessed. When you go to the provided URL, you will see the site shown here. Notice that there is a "Sign In" link located on the upper-right of the screen. Participating ENs will need to click this link to access the portal.

The screenshot displays the Ticket to Work website interface. At the top left is the logo with the text "TICKET TO WORK". In the top right corner, there is a "Sign In" link with a key icon. A callout box with a red arrow points to this link, containing the text: "Click the Sign In link to access the Portal". The main content area features four vertical panels:

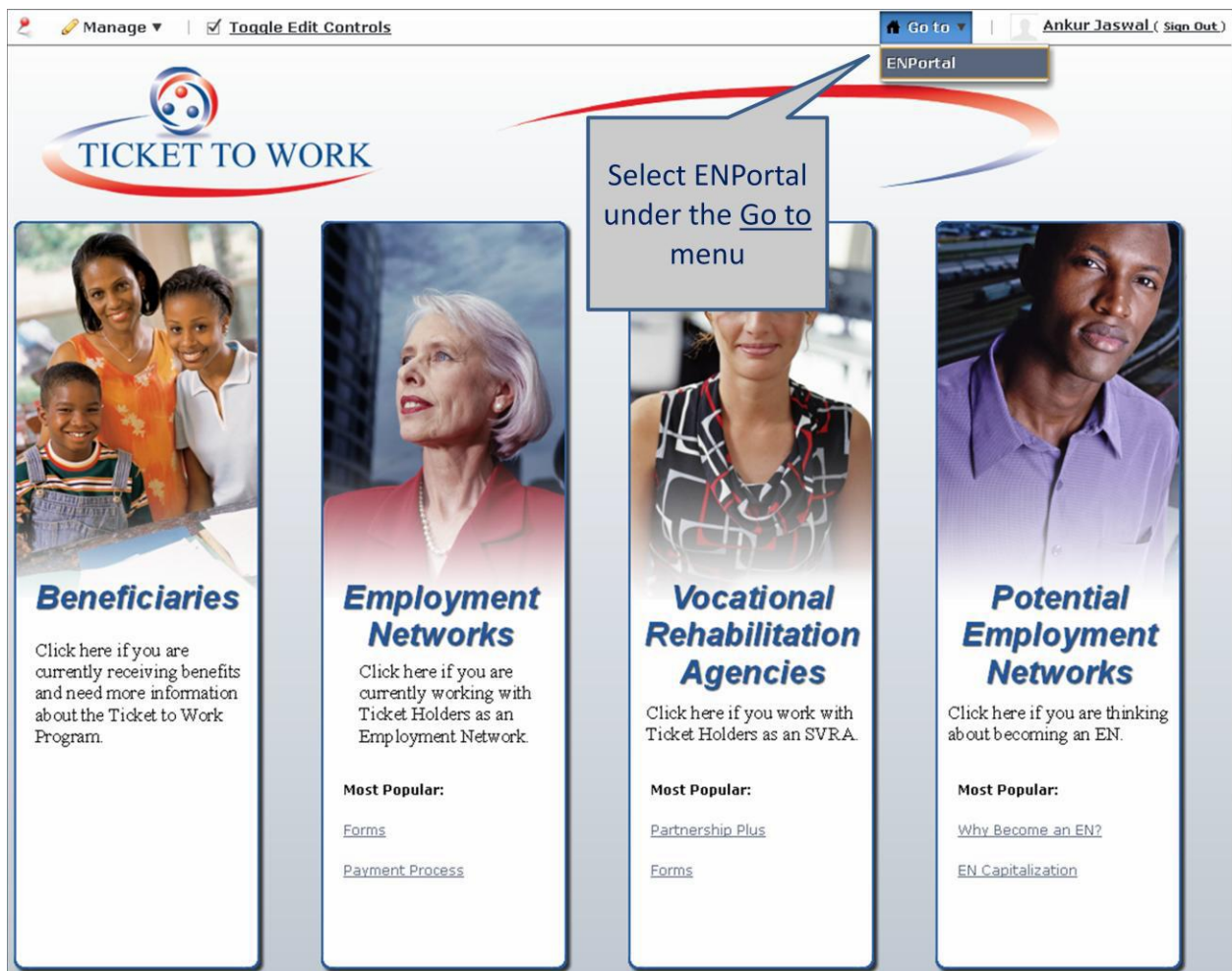
- Beneficiaries:** Includes a photo of a family and text: "Click here if you are currently receiving benefits and need more information about the Ticket to Work Program."
- Employment Networks:** Includes a photo of an older woman and text: "Click here if you are currently working with Ticket Holders as an Employment Network." Below this, under "Most Popular:", are links for "Forms" and "Payment Process".
- Vocational Rehabilitation Agencies:** Includes a photo of a woman and text: "Click here if you work with Ticket Holders as an SVRA." Below this, under "Most Popular:", are links for "Partnership Plus" and "Forms".
- Potential Employment Networks:** Includes a photo of a man and text: "Click here if you are thinking about becoming an EN." Below this, under "Most Popular:", are links for "Why Become an EN?" and "EN Capitalization".

At the bottom of the page, a navigation bar contains the following links: Home | Site Map | Privacy Statement | Terms of Use | Contact TTW | SSA Home Page.

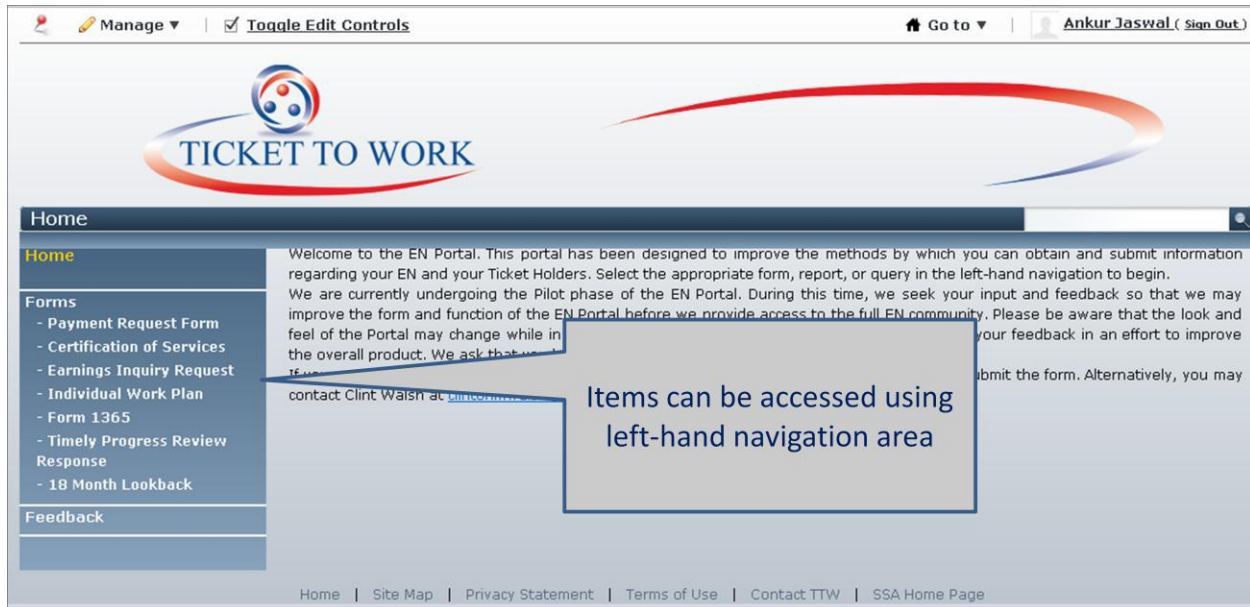
Once the Sign In link has been clicked, the user will be prompted to enter his or her login credentials. These credentials will be provided.



Once logged in, the user will be taken back to the Website starting page. This time, however, there is a toolbar at the top of the page, indicating that the user has signed in. To access the portal, the user will need to click on “Go to” in the toolbar and select EN Portal from the menu.



Clicking on ENPortal will bring the user to the portal home page. From here, available tools can be selected using the navigation area on the left of the screen.



## Forms

In presenting the forms, it should be noted that the review and confirmation screens appear in a similar fashion for all the forms in the portal. As a result, we will only present them once in this guide as part of the first form covered. However, both the online forms and the submissions will be reviewed.

### Payment Request – Online Form

Let's take a close look at the first form, which is the EN Payment Request form.

When the user first enters this screen, he or she will notice that the EIN is already populated on the form. This is because this is tied to the user's login ID. Next, the user will need to enter the SSN of the beneficiary. If the user enters the number incorrectly, he or she will receive an error message indicating that that particular beneficiary does not have a ticket assigned with that organization.

If the SSN is correct, and the employer information is already in the system, this information will auto-populate, as shown here. Next, as with the physical form, the user will select the payment method for that particular ticket assignment.

If the request is for a Phase 1 Milestone 1 payment, the user would select the appropriate information.

Next, the user would select the details of the certification payment request. It is important to note that **only certification payment requests can be made through the portal**. This is because security limitations prevent the attaching or uploading of information that may contain PII. As a result, no evidentiary payment requests can be made.

When completing the rest of the form, the user will not be able to directly enter a date. Again, this is a security limitation. Instead, the user will need to use the date picker that is made available.

When the form is completed, the user will click on the Next button.

The screenshot shows the 'EN Payment Request Form' interface. The left sidebar contains a 'Forms' menu with options like 'Payment Request Form', 'Certification of Services', 'Earnings Inquiry Request', 'Individual Work Plan', 'Form 1365', 'Timely Progress Review Response', and '18 Month Lookback'. The main form area includes the following fields and callouts:

- EIN Number (Tax ID Number):** 123456789. Callout: 'EIN will auto-populate'.
- Ticket Number /SSID:** 111223333. Callout: 'User enters SSN'.
- Name of Ticket-holder's Employer:** CP OF COLORADO / EMPLOYMENT WORKS. Callout: 'Employer will auto-populate if in the system'.
- Payment method for this ticket assignment:** A dropdown menu with 'Milestone-Outcome Payment Method' selected. Callout: 'User selects payment method'.
- Phase 1 - Milestone 1 Earnings Information:** A dropdown menu with 'The beneficiary achieved TWL earnings during the calendar claim month.' selected.
- Certification Payment Request Details:** A dropdown menu with 'Recent contact with beneficiary' selected.
- Beginning Payment Claim Month Request:** 1 / 2008. **Ending Payment Claim Month Request:** 1 / 2008.
- Recent Contact - Type of Contact:** Phone call.
- Contact Date:** A date picker control. Callout: 'For specific dates, the date picker control is used.'
- Description of Contact Regarding Earnings:** Over TWL.
- Repayment Agreement:** Radio buttons for 'Yes' and 'No'.

Additional callouts on the left side of the form:

- 'If the request is for a P1M1 payment, user selects the appropriate information' (pointing to the Phase 1 dropdown).
- 'Only Certification Payments can be requested through the EN Portal' (pointing to the form title).
- 'User clicks the Next button when the information is complete.' (pointing to the 'Next' button at the bottom).

### Review and Verification

Clicking the Next button will take the user to the Review screen. On this screen, the user will be prompted to review the information that had just been entered. As shown here, the information is grayed out on this screen, indicating that it is locked. If the user notices an error and would like to make a correction, he or she can click on the Return button on the bottom of the screen. This will go to the previous screen where those corrections can be made.

If the entry was completely in error, the user can click on the Cancel button to discard the entire entry.

After the user has checked everything and made sure that all the information is correct, he or she can click the Submit button to send the information to MAXIMUS.

The screenshot shows the 'EN Payment Request Form' interface. The left sidebar contains a 'Forms' menu with 'Payment Request Form' selected. The main content area includes a header, a warning message, and several form fields. Callouts point to the 'Return', 'Cancel', and 'Submit' buttons at the bottom, explaining their functions: 'Return' for edits, 'Cancel' for removal, and 'Submit' for submission. A red warning message states: 'Please review your entry. If you wish to change any field, hit the "Return" button, if you wish to cancel the entry, hit the "Cancel" button, if you wish to submit the entry for processing, hit "Submit" button.' The form fields include: EIN Number (123456789), Ticket Number (111223333), Name of Ticket-holder's Employer (CP OF COLORADO / EMPLOYMENT WORKS), Payment method (Milestone-Outcome Payment Method), Phase 1 - Milestone 1 Earnings Information (The beneficiary achieved TVL earnings during the calendar claim month), Certification Payment Request Details (Recent contact with beneficiary), Beginning and Ending Payment Claim Month Request (12/2008), Recent Contact - Type of Contact (Phone call), Contact Date (02/04/2008), Description of Contact Regarding Earnings (Over TVL), and Repayment Agreement.

### Confirmation Page and Email

Clicking the Submit button will bring the user to the Confirmation Page. This page provides information on who made the submission, when the submission was made, and what form was submitted. The user will also receive this information in the form of an email.



Forms > Confirmation

Home

Forms

### Confirmation Page

Please note the unique number is assigned to this record (request). This number should be used when requesting research in the database for this record.

User ID of Person submitting the entry: 1890184847

Date/Time Submitted: Mon Feb 14 22:46:46 GMT 2011

Entry Type: ENPAYMENT\_REQ

Confirmation Number: 502050

If you have any questions, please contact the MAXIMUS Ticket to Work office toll-free at 866-949-3687

Print

## Earnings Inquiry Request – Submitted Form

The next form is the Earnings Inquiry Request (EIR). When using the Portal version of this form, many of the necessary fields will populate automatically for the EN. Since this information is already there, the user will only need to enter the SSNs and the Ticket Assignment Dates. There is a default listing of six fields. However, users can add more fields clicking on the Add Beneficiary link.

Forms > Earnings Inquiry Request

Home

Forms

- Payment Request Form
- Certification of Services
- **Earnings Inquiry Request**
- Individual Work Plan
- Form 1365
- Timely Progress Review Response
- 18 Month Lookback

Feedback

### Earnings Inquiry Request Form

Complete this form to request earnings information for Ticket Holders with Tickets assigned to your Employment Network.

EIN (Tax ID Number) : 840420225

Name of Person submitting the request : Ankur Jaswal

Title of person submitting request : Manager

Earnings Info Regarding the Following Beneficiaries

Social Security Number (HO HOME)	Date of Ticket Assignment	Add Beneficiary

If you have any questions, please contact the MAXIMUS Ticket to Work office toll-free at 866-949-3687

Next

## Earnings Inquiry Request – Submitted Form

The EIR will come to MAXIMUS in the form of a normal email. It will contain only the information needed to process the request. It will look similar to the following:

To: ssafax@maximus.com  
From: appadmin@rcssap02.maximus.com  
Date: 03/03/2011 03:07PM  
Subject: Request for Earnings Inquiry Request

### Earnings Inquiry Request

Submitter's Name : **Ankur Jaswal**  
EIN : **840420225**  
EN Name : **CP OF COLORADO / EMPLOYMENT WORKS**  
Submitter's Title : **Manager**

Date of Request : **03/03/2011**

**Earnings Info of Beneficiaries**

SSN	Date of Assignment
001462818	08/31/2010

***Individual Work Plan – Online Form***

Now let's look at the Individual Work Plan (IWP). Like the other forms, the user will need to enter the SSN. Next, the user will need to select the support services required immediately and those that will be provided after nine months. In both cases, checkboxes are provided to make these selections. Note that "Other Services" is not available. This is because the selection of "Other Services" would require elaboration, which cannot be done through the portal, since there are no open text fields for users to type in information. Again, this is a result of the low security level of the portal. ENs that need to use the "Other Services" option will need to fax the physical form. For the same reason, the form must be faxed in if there are Additional Terms and Conditions, as this will require some level of elaboration.



Home

Forms

- Payment Request Form
- Certification of Services
- Earnings Inquiry Request
- Individual Work Plan

- Form 1365
- Timely Progress Review Response
- 18 Month Lookback

Feedback

### Individual Work Plan

Please complete this form to request a Ticket Assignment. The form may only be entered after you have met with the Ticket Holder and have agreed to the services that are to be provided.

EIN Number(Tax ID Number): 840420225

Beneficiary SSN:

Vocational Goal:

Checkboxes instead of writing services.

Support/Services required:

- |   |   |
|---|---|
| <input type="checkbox"/> Business/Employer Mentoring Programs/Internships           | <input type="checkbox"/> Career Consulting  |
| <input type="checkbox"/> Career Strategies  | <input type="checkbox"/> Case Management  |
| <input type="checkbox"/> Employment   | <input type="checkbox"/> Habilitation Services  |
| <input type="checkbox"/> Job Accommodations   | <input type="checkbox"/> Job Placement/Employment Services                            |
| <input type="checkbox"/> Job Service Vouchers                                       | <input type="checkbox"/> Job Training   |
| <input type="checkbox"/> Peer Mentoring Services                                    | <input type="checkbox"/> Personal Attendant Support Services                          |
| <input type="checkbox"/> Post-Employment Support                                    | <input type="checkbox"/> Psychosocial Rehabilitation                                  |
| <input type="checkbox"/> Referral to Services/Support from Local MH or DD Providers | <input type="checkbox"/> School to Work Transition Services                           |
| <input type="checkbox"/> Self-Employment/Business Start-up                          | <input type="checkbox"/> Services under a Formal Agreement with a WIB and/or One-Stop |
| <input type="checkbox"/> Situational Assessment                                     | <input type="checkbox"/> Special Language Capacity                                    |
| <input type="checkbox"/> Supported Employment                                       | <input type="checkbox"/> Transitional Employment Program                              |
| <input type="checkbox"/> Transportation Assistance                                  | <input type="checkbox"/> Work Incentives Counseling                                   |

"Other Services" is not an option.

After 9 months, ongoing job retention services needed:

- |   |   |
|---|---|
| <input type="checkbox"/> Business/Employer Mentoring Programs/Internships           | <input type="checkbox"/> Career Consulting  |
| <input type="checkbox"/> Career Strategies  | <input type="checkbox"/> Case Management  |
| <input type="checkbox"/> Employment   | <input type="checkbox"/> Habilitation Services  |
| <input type="checkbox"/> Job Accommodations   | <input type="checkbox"/> Job Placement/Employment Services                            |
| <input type="checkbox"/> Job Service Vouchers                                       | <input type="checkbox"/> Job Training   |
| <input type="checkbox"/> Peer Mentoring Services                                    | <input type="checkbox"/> Personal Attendant Support Services                          |
| <input type="checkbox"/> Post-Employment Support                                    | <input type="checkbox"/> Psychosocial Rehabilitation                                  |
| <input type="checkbox"/> Referral to Services/Support from Local MH or DD Providers | <input type="checkbox"/> School to Work Transition Services                           |
| <input type="checkbox"/> Self-Employment/Business Start-up                          | <input type="checkbox"/> Services under a Formal Agreement with a WIB and/or One-Stop |
| <input type="checkbox"/> Situational Assessment                                     | <input type="checkbox"/> Special Language Capacity                                    |
| <input type="checkbox"/> Supported Employment                                       | <input type="checkbox"/> Transitional Employment Program                              |
| <input type="checkbox"/> Transportation Assistance                                  | <input type="checkbox"/> Work Incentives Counseling                                   |

Earnings History:

Terms and Conditions Related to the Provision of Services:

Beneficiary Signed:

Date Beneficiary Signed:

Date Provider Signed:







## Form 1365 – Online Form

The next form is Form 1365, which is used by State Vocational Rehabilitation Agencies for ticket assignments. The controls on this form are the same as the controls available on the other forms. As with the IWP, the online form asks only for basic information and does not allow for elaboration. Because of this, the form that is submitted to MAXIMUS contains only the information needed to complete the form.

The screenshot shows the 'Form 1365' page in a web browser. The page title is 'STATE AGENCY TICKET ASSIGNMENT FORM'. A navigation menu on the left includes 'Home', 'Forms' (with sub-items like 'Payment Request Form', 'Certification of Services', 'Earnings Inquiry Request', 'Individual Work Plan', 'Form 1365', 'Timely Progress Review Response', and '18 Month Lookback'), and 'Feedback'. The main content area contains the following fields and options:

EN EIN : 840420225

Ticket Number :

Vocational Goal :

EEOC Classification :

Date of Beneficiary Signature :

Date of SVRA Signature :

Date to Achieve Goals :

Services

<input type="checkbox"/> Business/Employer Mentoring Programs/Internships	<input type="checkbox"/> Career Consulting	<input type="checkbox"/> Career Strategies
<input type="checkbox"/> Employment	<input type="checkbox"/> Case Management	<input type="checkbox"/> Habilitation Services
<input type="checkbox"/> Job Accommodations	<input type="checkbox"/> Job Placement/Employment Services	<input type="checkbox"/> Job Service Vouchers
<input type="checkbox"/> Peer Mentoring Services	<input type="checkbox"/> Job Training	<input type="checkbox"/> Personal Attendant Support Services
<input type="checkbox"/> Post-Employment Support	<input type="checkbox"/> Psychosocial Rehabilitation	<input type="checkbox"/> Referral to Services/Support from Local MH or DD Providers
<input type="checkbox"/> Self-Employment/Business Start-up	<input type="checkbox"/> School to Work Transition Services	<input type="checkbox"/> Services under a Formal Agreement with a WIB and/or One-Stop
<input type="checkbox"/> Situational Assessment	<input type="checkbox"/> Special Language Capacity	<input type="checkbox"/> Supported Employment
<input type="checkbox"/> Transportation Assistance	<input type="checkbox"/> Transitional Employment Program	<input type="checkbox"/> Work Incentives Counseling
<input type="checkbox"/> None		



## Timely Progress Review Response – Online Form



Next, we have the Timely Progress Review (TPR) Response. This form is to be used when the EN has been notified by MAXIMUS that certain Ticket Holders have not responded to the Timely Progress forms that had been sent. ENs can enter their responses online through this form instead of filling out the paper and faxing it back.

For each beneficiary the EN will need to enter the TPR period and answer a series of Yes/No questions. Because Timely Progress is defined differently for each review period, the questions will change based on the review period. The questions here are those that need to be answered when a beneficiary is undergoing the first 12-month review.

Forms > TPR Response

Home

Forms

- Payment Request Form
- Certification of Services
- Earnings Inquiry Request
- Individual Work Plan
- Form 1365
- **Timely Progress Review Response**
- 18 Month Lookback

Feedback

### Timely Progress Review

Please fill out any column(s) that applies to the individual. Only indicate work or educational credits you are aware the beneficiary achieved during his or her progress review period. Select "Yes" for the question that matches the level of progress your client met during their 12-month progress review period.

When an individual has fully met any single requirement for the period, you need only indicate it in the appropriate box and the other boxes do not need to be completed. If the beneficiary had a combination of earnings and education for the period, please select Yes for that question.

Leaving all columns blank for an SSN will indicate that you do not have information showing that the individual met the Progress Review requirements.

EN EIN: :840420225

Beneficiary SSN: :

TPR Period (1 - 12): : First 12-month Review

TPR Response Due Date: :

**First Review**

Has the beneficiary earned at least 90% of the Trial Work Level amount in at least 3 of the past 12 months?	<input type="radio"/> Yes <input type="radio"/> No
Has the beneficiary obtained a high school diploma or GED in the past 12 months?	<input type="radio"/> Yes <input type="radio"/> No
Has the beneficiary completed 60% of a full-time course load for a college academic year in the past 12 months?	<input type="radio"/> Yes <input type="radio"/> No
Has the beneficiary completed 60% of a full-time course load for a technical, trade, or vocational program year in the past 12 months?	<input type="radio"/> Yes <input type="radio"/> No
Has the beneficiary completed a combination of the Earnings requirement plus the Education or Training requirement that totals at least 100% in the past 12 months?	<input type="radio"/> Yes <input type="radio"/> No

Next

Questions will change based on the Review Period selected.







### *Future Project*

SSA is in the process of building the Internet Ticket Operations Provider Support System (iTOPSS). iTOPSS will subsume the Secure Provider Portal. iTOPSS is in the early stages of design. It will include a portal that will allow both Social Security contractors and Social Security beneficiaries to login and conduct business with the agency.