TICKET to Work

EN Essentials

Transcript: At Your Service, Who to Contact on the TPM Team
April 10, 2024

Ana Morales: Welcome to today's EN Essentials session, At Your Service, Who to Contact on the Ticket Program Manager Team. My name is Ana Morales, and I will serve as today's moderator.

If this is your first EN Essentials session, please know we design the content for individuals seeking to enhance their Employment Network’s performance and compliance with the program policies. The learning events build upon the initial EN Foundations training and feature new resources, best practices, and other helpful information. Before we begin with our presentation, I would like to review the agenda and a few housekeeping items. Next slide, please.

During this month EN Essentials, we will cover how Social Security Ticket Program Manager, or TPM, is At Your Service. After the logistics, we will cover the goals of the session, discuss team roles, and reveal key tips are engaging with the different departments that serve employment networks. We will also include who to contact with questions and have a couple of scenarios. We will close the session with Q&A time, and we will be joined by the managers from all of our departments. Next slide, please.

I will now review some logistics to make the most out of today's session. First, TPM is recording and capturing the transcript from today's meeting and will make it available on your Ticket to Work website at the EN Essentials Learning Events. Next, please remember that per the Ticket Program Agreement Part 3, Section 11 Subsection I, EN staff are not permitted to record this meeting nor capture the transcript. For questions, please feel free to ask the questions in the MS Teams Chat section. And we do ask that you refrain from answering questions in the chat that are intended for TPM or SSA staff. If you have additional questions or comments, you can send those to ENoperations@yourTickettoWork.ssa.gov , and we will route your question to the appropriate department. For closed captioning, it is available for participants who join us using the Teams chat application or by using the closed captions link provided in the Gov Delivery email announcement for today's call. And I believe it is also posted in the chat.

To turn on closed captioning in the MS Teams, go to the three ellipses at the top of the MS Teams window. Click on More. Scroll down to the list to Language and Speech, and then click on Turn on Live Captions. When using the link, paste the link in the browser; and it will open a separate window to view the closed captions. Next slide.

As I mentioned, I am the moderator for today's session, and I am joined by Derek Shields. Derek is commonly our moderator, but today he's here as our senior EN Development and Training Manager. He will serve as our presenter. Next slide, please.

This EN Essentials has four goals as learning objectives for today. All are revolving around the Ticket Program Manager departments that specifically serve you all, the Employment Networks.

And we will cover what each department is responsible for; which department to contact for the type of help you seek; and how to best reach that department. And we also are sharing some key tips for efficiently working with each department. And, again, we are concentrating on the TPM departments that serve and support employment networks. So if we don't cover the part of our TPM work like the Beneficiary Help Line, for example, keep in mind that the content is tailored to the departments and services we provide that are EN facing in nature. Next slide, please.

At this time, I will now turn the session over to Derek so he can begin with his review of TPM departments at your service. Derek.

Derek Shields: Thank you, Ana, for setting us up today for this EN Essentials session.

It's really an honor to be here and represent six Ticket Program Manager departments and provide this experiential description for you about the different work we do and how it's organized. I appreciate sharing these thoughts with you today, and let's get right into it because we have a lot to share. So next slide, please.

On this slide I'm going to review the six departments that I will cover and share with you that we have leaders from each of the departments with us. When we get to our open Q&A at the end, it's a chance to work directly with them. I'm honored to represent them in the content they've been provided so you can have this information, but it's really been sourced by Ticket Program Manager leaders with support from our colleagues at the Social Security Administration.

To begin, we have on the screen here six overlapping circles. And these are the different EN-facing departments that TPM has. And the idea is to depict in the overlapping circles the idea of the reality of our services, that they are overlapping in nature. And there are handoff areas between and amongst departments. And sometimes it flows directly, and other times it kind of hops from one area to another. We're going to describe that today. I'll go through each of these quickly here, and then we'll go into each of them in more depth.

We start on the upper left with EN Service. This is the team that you engage with your general inquiries and transactions and most likely are most familiar with from the award experience in your TPA.

After that we have EN Development and Training. This is the department that Ana and I sit in. We obviously focus on training and activation. And many of you have engaged with the team of analysts to do EN foundations required training and these very Essentials events themselves.

Next, in the bottom left, we have Program Integrity. This is our team that focuses on compliance and quality issues.

On the upper right, we have provider support. This is where the EN Payments and Systems help desks reside, followed by EN Payments, our team that focuses on EN compensation.

And our sixth department today that we'll cover is Communications and Outreach. This is the group that provides the marketing tools to help ENs and your outreach work in identifying beneficiaries to participate in the program.

These are the six departments that we have that we'll cover today. And keep in mind that the idea is looking at the connection and overlap and handoffs. The specific responsibilities will be covered, along with tips that each team has provided. Thinking of the end in mind, as you do have questions, you can provide them in chat. Or you can prepare to ask them live with our department leaders. With that, I'd now like to move to the next slide, please.

Our first department that I'll cover is the EN Service team. The purpose there is the General Ticket Program Inquiries and Transactions. And this team is led by Terry Simpson. She is our ENS Support Manager. And to give a little context for each department about the volume of work that's done, we'll provide that for each one of these departments. In 2023, when you think of the EN Service team, they worked closely with the Social Security colleagues in processing nearly 90,000 service transactions coming in from employment networks. We'll look at those types of transactions more specifically next but just gives you some context. When communicating with EN Service, most of you probably know you use enservice@ssa.gov , the address that Glynis posted in chat.

And there are two tips there. Providing your EN PID or Provider ID in the subject line is always beneficial and please allow 24 hours for a response. When they have those 90,000 service transactions, they need a little time in order to turn those around. Let's go to the next slide and look at those ENS responsibilities.

When we think about those 90,000 services that I mentioned, they're broken into a variety of responsibility areas. In fact, there are 13 of them on this slide that I'm going to go through, and then we'll look at those tips for working with this department. Of course, they handle the EN Request for Application and reviewing and assisting SSA in the award notification process. They also help with the onboarding process for new ENs, and that includes suitability tracking and status. That helps new ENs get your staff suitable so you can begin work, and it also helps current ENs add suitable staff in order for them to be able to work with Ticketholders. Of course, along with suitability, they also handle security awareness processing, both suitability and security being key. And subtract all these changes on that fourth bullet. They use the Ticket Program Agreement Change Forms. This is a key tool when working with EN Service, and we'll explore that a little bit more on the next slide.

The fifth bullet is the SAM Account renewal. If you're not familiar with SAM, this is the System of Award Management for doing business with the federal government. And they handle the renewals process, a key area.

Next, we have the Ticket Portal Enrollment and Resets. If you're in the Ticket Portal world, this is one of those classic areas ─ well, EN Service will assist with the enrollment and reset process, but then they'll provide a handoff. And you'll see a little bit later that you'll engage with the provider support desk for Ticket Portal support later on.

The final bullet on the left side focuses on approval requests. This covers a lot of things including benefits counseling, cloud-based solutions, Partnership Plus, and the benefit counseling certifications. When we think about those, they can go to Program Integrity during your annual Services and Supports Review. However, you can send them to EN Service between your annual Services and Supports Review timeframe. So, here's another one of those overlapping areas.

Then on the upper right side we have administrative reports, employment verification. And, of course, EN Service can help you. They're the team you connect with to provide your Find Help EN descriptions in your Marketing Statements. These are key elements that go into the Choose Work/Find Help Tool, and this is where beneficiaries and others are seeking Employment Network service providers.

On the third of the last bullets for EN Service we have ENS as being one of the requirements for contacting when ENs must report personally identifiable information breaches or suspected or possible breaches. It's important to note, you know, when an EN employee, including a subcontractor, provider affiliate employee becomes aware or suspects that PII has been lost, compromised, or potentially compromised, the EN has to do two things. The first is contact SSA's National Network Service Center. The second is the information being shared with ENservice@ssa.gov. And both of these have to happen within one hour of the incident. This is an important requirement for the EN Service team that you engage with.

And to wrap it up, they also provide EN Cure Notices and Terminations. It's critical to note that, while TPM supports SSA in all of these areas and we do a lot of work there, EN Service is doing this in support and refers to SSA for all reviews and final decisions. There is a close partnership going on around appeals, escalations, and quality assurance. The EN Service team, while part of TPM, is doing this all very closely with Social Security. With that in mind, let's transition now to some tips for effective engagement with the EN Service team on the next slide.

So, with these steps, the EN Service team has come up with five areas that they recommend, and I'll go through those with some supporting details. And some of these, again, there'll be themes that you'll see with other teams too.

For email communication with EN Service, include approval request in the subject line, if emailing EN Service about those areas, benefit counseling, cloud-based solutions, Partnership Plus, or work from home requests. That approval request will allow it to get sorted and responded to faster in that subject line. If you have the PII breach, including PII breach in the subject line when reporting a suspected or actual PII breach will allow for a more expedited response and a faster investigative support process. So, two tips there on email communication.

Next, under TPA Change Forms, I mentioned this before. Submitting the TPA Change Form to capture and report all of those organizational changes, adding employees prior to their suitability application being a key one of those changes, and the recommendation is to access the form from the website. This TPA Change Form can change from time to time, and it's important to use the most updated version.

Glynis has posted that link in the chat. We encourage you to use the one from the website. I know we tend to download things and repurpose them. But always going out to get the website version will ensure you're using that.

On the right side, three more tips, Ticket Portal enrollments and resets. Extra security is required before processing a Ticket Portal enrollment. Keep that in mind to make sure that it's there. And log into the Ticket Portal every 60 days to avoid suspension or deletion. That inactivity could lead to removal, suspension, or deletion. Making sure you're active every 60 days will avoid that from happening and keep people with the tools they need to do the work needed.

On suitability documentation, all EN employees need suitability, keep that in mind, except there's that one exception. The Signatory Authority who does not handle PII does not need suitability. Outside of that, everyone needs it. And so be sure to keep that in mind and use those TPA Change Forms to add employees prior to suitability application.

And, last, Security Awareness includes two forms for processing. Include only the Ticket to Work Program staff. And, in that process, we know that you're all just now doing this. We appreciate responsiveness. And, for the addendum, include the Signatory Authority in all EN employees, not just suitable employees. So, keep that in mind. We know you just processed these forms, and we appreciate your help with this annual requirement.

That's it for our first team. With that, we'll move forward to the next team, EN Development and Training. This is the ENDT Department. Development and Training focuses on your training and activation, helping new ENs get going and new employees and ENs understand the program as well. Ana Morales, who's our moderator today, leads this team as our EN Development and Training Manager.

And looking back at 2023, the Development and Training Department graduated 670 learners from 424 ENs, through the EN Foundation's mandatory curriculum.

We also added EN Essentials Learning and had about 1545 individuals in the first five events. And we're also excited this year we're doing well. We've had three events before this one with 854 attendees. And I appreciate you all being with us today for this event focused on our customer service.

When reaching out to Development and Training, the ENoperations@yourTickettowork.ssa.gov email is what we use. And like EN Service, please include your EN PID in the subject line and give us 24 hours for that response time. We do appreciate that being in the email. It helps us process and give 24 hours to be responsive. So, with that, let's go to the next slide and look at the specifics that we do in EN Development and Training.

This department, as I mentioned, oversees, obviously, training. We look at activation training, but we also look at supplemental training for both new ENs and new EN staff. We also do the recruitment work. And on this slide, we list the specifics of our work – as you suspect we lead with the EN Foundations training. Upon a new individual being added to your team or a new EN award, our analysts will take you through the enrollment process in the Learning Management System. And we do that through three different learner pathways, depending on a role.

And that will start out with an EN orientation. That's a scheduled one-on-one session. And then, after that, you'll begin up to 14 online learning modules. It does depend on which learner pathway you're on, if you do all 14 or if you have fewer. And, throughout that process, you'll meet with the analysts, have a learning assessment to discuss the content that's been learned and really the retention of that content and if you have any questions.

It's important to note that the EN Foundations training, while it's mandatory for certain learners, it's also available to any EN employee at any time online. It's an optional training that exists, and it's also used for refresher training.

Next, as I mentioned, we also have the EN Essentials series focused on compliance and performance topics. We're trying to bring ideas and resources to you all. This year, the last two focused on payments with a deeper dive. We're doing the customer service today. As we'll mention at wrap-up, we look to enter into the arena of marketing, planning, and techniques coming up in May.

On the final bullet on the left side there, we also develop technical assistance guides and tools. Last year, we did the EN Guide for Working with Ticketholders. This year, we look to publish a marketing guide with some supporting worksheets. We're available to develop aids that help in the work you do. And, when you do submit ideas to us, that helps drive our discussion with Social Security about what do we do next, and what can we do to support development, training, and activation for highly successful EN performance.

On the right side, as I mentioned, we have supplemental training. If there's something out there that you need, please reach out to us at the EN Operations email box, and we'll be able to talk to you about that supplemental. It could be a one on one, or it could be a small group session. We'll work with Social Security to review your request. At times, we provide PII refresher training.

And, as I mentioned, we also support prospective EN inquiries. We run our recruitment pipeline and meet with service providers to see if they meet the qualifications to become an EN and then support them up to the point of application.

And then, here's a reverse. ENDT gets out of the way of the recruitment review process. It actually goes back to EN Service who will work closely with SSA, to make that award determination. After award, it will come back to us once the individuals are ready for learning.

And the last two you may be familiar with. the first one is quarterly all EN Calls. We help plan and produce those. The second to last one, the Quarterly Partnership Collaboration Meetings you may be less familiar with. Our team works with the Ticket to Work VR coordinators in every state across the country, and we do meet with them about Partnership Plus arrangements and have monthly meetings with the Ticket coordinators to plan quarterly calls. What we're also doing is meeting with states who do not have those agreements to have partnership collaboration calls. We're working closely with Ticket coordinators and other key state partners to try to engage more with ENs and looking at disability employment pipeline and solutions in those states. We're finding a lot of momentum in those conversations. We hope they lead to more Partnership Plus agreements and handoffs. But we also hope to do more introductions of ENs to key relationships in those states as well.

So those are the tasks for ENDT. Let's move to the next slide to look at some key tips from this department. For Development and Training, we have four key tip areas.

We'll start with the mandatory EN Foundations training. For that, we do need to submit a TPA Change Form first to ENservice@ssa.gov to add or remove EN employees. That can also help us identify new main points of contact. When that happens, then we might have to enroll somebody. So, it's key to know that. The name is important, and we encourage you to use the same name used on the person's application for suitability for consistency.

And we have a note here. When completing suitability, it is considered part of the EN Foundation's training. So, the EN suitability contact, meaning the suitability contact at your organization, should follow up with the training enrollee to ensure all the documents have been submitted. Development and Training and EN Service both have a tracking of suitability capability. But suitability is not handled by us, obviously. It's handled by the government and the Social Security Administration. We can track it and we can assist, but we need the EN to take ownership of that conversation.

And then, last, the training must be completed in 60 days. This is mandatory from award date as part of the TPA itself, and also applies from a TPA change date. So, our team is there to assist. If we expedite right out of the gate and get suitability paperwork going, 60 days is very possible. And we do that for a majority of learners.

Next, some tips on training and resources. We'll say contact us. We want to hear what you prefer and need. You can email us at ENoperations@yourTickettowork.ssa.gov. You can request the information about EN Foundations. You can ask for supplemental support. You can submit topics for our EN Essentials content for these very sessions we're hosting like today. And you can request information about Partnership Plus in the collaboration meetings that may be happening in the state of your operations.

Second to the last, we have – well, the last two. We have two tips. The All EN Call Recaps and the recordings of our events are both really good resources. Sometimes during the All EN Call Recaps we'll have policy changes. And sometimes in these events you might not have somebody who's able to attend, but you could take the recording of an EN Essentials and share that or share one of the other events that our colleagues in another department do. You can access that on the Your Ticket to Work website under Training and Events and go to Calendar Events for past activities. You can look at those but also get those ones on your schedule for the upcoming one, so you don't miss them.

Let's go forward now to our Program Integrity department. Program Integrity, as I mentioned, covers quality and compliance. This is led by Mary Kay Murphy, who's actually presented on EN Essentials and I'm sure many of you are familiar with. Mary Kay is our Program Integrity Senior Quality Manager.

This department completed 367 annual Services and Supports Review in 2023 and also included 1,406 IWPs and 2,828 Certification of Services reviews. This gives some context to the work that this team is doing.

Program Integrity does use two different email options and offers fax. The email is programintegrity@yourTickettowork.ssa.gov. Glynis posted that in chat. And then we have the secure GSO account, and that's ssa.gov/gso/gsowelcome.htm. When you go there, be sure to select SSA ORDP from the address list. The fax is used to protect information, of course, 703-893-4020.

And three tips here when communicating. Once again, include the EN PID in the subject line. Send PII only with the GSO or fax options. And they also request 24 hours for response time.

Let's go to the next slide and review the Program Integrity areas task areas.

We start out by looking at the oversight of Ticket assignments and EN compliance, which can be a lot of things. Let's look at that a little bit more specifically. Their tasks are broken out into the annual Services and Supports Reviews. That's a six-month review for not in non-compliance as well.

And then we have the TAS, the TARS. If you're not familiar with this, I'll review those for you. The Technical Assistance Sessions, those are the TAS, they're scheduled with an EN to review areas of noncompliance on the services and supports reviews and to provide suggestions for an improvement or two. The TARs, Ticket Assignment Reviews, they're the reviews of the Individual Work Plans for newly awarded ENs and ENs with two consecutive noncompliance Services and Supports Reviews. If you're not familiar with those terms, that's the difference between them.

Program Integrity also has requests for Ticket assignment and unassignment. This can include unassigned Tickets when requested by the Ticketholder and they can unassign them at the EN's request if you don't have access to unassign a Ticket in the Portal. Program Integrity also assigns Tickets for compliant IWPs for ENs that are on that TAR, the Ticket Assignment Review. And like the supporting bullet refers to, also investigates assignment issues for ENs with Ticket assignment access but receive error messages.

Up in the next column, Program Integrity has four more areas that they provide support: the Annual Performance Outcomes Report, or the APOR. Thank you all once again for participating this year in January and February, the APOR season. Program Integrity has that responsibility.

And then they also focus on GSO access and manage requests to add and remove users from the Program Integrity GSO account. And, we have dispute resolution with external complaints.

And the final one, they handle the personally identifiable information violation investigations and sanctions. So, you report this to the National Center, the SSA National Center, a PII breach or suspected breach. And you email EN Service with that information. The group that investigates is Program Integrity. Two reporting and one follow-up investigation process.

Let's now move to Program Integrity tips. Here we have six tips for Program Integrity, And we're going to start with Services and Supports. The first part of that is send one file for each Ticketholder with the correct file name. So, review that before you're sending it in to ensure all those documents are sent for all Ticketholders. Then the second is to review prior to sending – use the file name example included on the services and supports request for information that contains all Ticketholders. That's going to be included in the review, and it's important to use that file name example when sending these in.

Next, for those TARS, Ticket Assignment Review, TARS is mentioned in training of EN staff, but every new employee doesn't need to send in 10 IWPs for review. Understanding that expectation can be helpful. If your EN is not on the Ticket Assignment Review, you can ensure new employees' IWPs are compliant before assigning the Ticket. You can have an internal process to do that.

We do have some new resources. The links are on the slide. The first one is the IWP submission cover sheet. You could use that to help the Program Integrity Department direct the IWP to the appropriate person for faster resolution. That link is now in chat, along with the EN Ticket an Assignment Request Template. An EN can assign Tickets in the Portal and can unassign Tickets. And you can use that template if an EN doesn't have Ticket assignment access. Two resources, two tips about those resources.

Next, we have instances for Ticket assignment and instances where your EN is unable to assign a Ticket. You must include the IWP With Ticket Assignment Request. If you're looking for assistance from TPM, please keep that in mind.

Under GSO access, as mentioned this is one of their service areas. TPM uses several different GSO accounts. The tip here is, when you're looking to work with Program Integrity for requests to add or remove GSO users, keep in mind that you're using the Program Integrity one. And then once a user does have access, ENs that are locked out of that account or can't remember their password should email UIT directly at UIT.edata.mailbox@ssa.gov. Include password reset in your subject line and include a username in the message.

And last, the final tip that's always about communication, for emails to Program Integrity, include the EN name and the PID. Please don't send emails to Program Integrity containing PII. That should only be going through the GSO system or via fax only. And include enough information so Program Integrity can really understand the issue and questions and be able to respond.

So those are the tips from Program Integrity. And we've gotten halfway through our six departments. Let's move now to our fourth department, please. The Provider Support team. This is our EN Payments and Systems help.

And in 2023 this team handled 3927 incoming and 216 outbound calls; handled about 10,500 emails; and processed over 2000 faxes and nearly 46,000 pieces of mail. This is led by Sharday Jenkins. She's our Provider Help Desk and document manager.

There are different ways to contact this group. I think they've been put in chat. We have a phone number, 1-866-949-3687. You choose option 2 to reach the Payments Help Desk or option 3 to reach Systems Help. And they have two email addresses, ENpaymentshelpdesk@yourTickettowork.ssa.gov for payments inquiries and the ENsystemshelp@yourTickettowork.ssa.gov for Ticket Portal, Ticket assignment, and resource navigation.

They are the Documents team, so they handle the old school mailing address Ticket to Work, PO Box 1433, Alexandria, Virginia 22314. And they still handle fax too at 703-893-4020.

Let's look at their tasks in more detail on the next slide. Provider Support receives all incoming mail and fax documentation and receives and handles all of the help desk inquiries via phone and email for both EN Payments and EN Systems. It is broken down in that regard. For EN Systems Help, for the Ticket Portal, they cover navigation questions, systems malfunctions, and fax issues. On the EN Payments Help Desk inquiries, they cover payment status, payment reconsideration requests, payment denials, overpayments, and ePay. And the last three on the right side here, they can assist with Ticket assignment status, navigation of the website for locating some key forms and resources for your work and will assist with accessing SSA to get policy clarification when needed. Those are the services that provider support provides.

Let's now move to the next slide to look at some of the key tips and recommendations from this team. We have them broken into four different areas.

For provider support, the first is to provide detailed information so the help desk can understand the issues and questions. Once again, include the PID number in the subject line; provide an SSA reference number from Portal when possible, and provide the Portal error screenshot. And if this is applicable, then that's coming to them via fax only.

The next tip area is to locate and learn about available resources. These tools that are available to you include the learning modules, the monthly earnings estimator, the 18-Month Look Back Tool, and the Payments at a Glance Tool. They encourage you, if you haven't used them for a while or are less familiar with them, to check them out through the resources link at Your Ticket to Work.

Next, the Ticket Portal User Guide. If you're getting into Ticket Portal, this is a critical tool that provides step-by-step instructions. It's highly detailed and helps you in understanding how to request Ticket payments and view pending payment status and history. If you don't have access to the guide, request it by emailing ENsystemshelp@yourTickettowork.ssa.gov.

And, last, payment requests. There are a couple tips from Provider Support about payment requests, specifically, understanding payment criteria, policy and/or requirements for payment consideration before submitting for payment. When you think about that, it makes sense that the help desk team is indicating to go back and review that payment criteria, the policy to truly see if what you're submitting aligns with it.

And then, when you do something via the manual fax line, the tip is that payment requests must be submitted via the Ticket Portal unless the EN receives an error message.

So, go to the Ticket Portal first. If you have the error message, then turn to the fax.
You might also have prior authorization. Reach out through phone or email to the help desk. The EN must submit a screenshot of that error message, a manual payment request form, and all earnings documentation through fax. So, you've got to get that approval first before using that.

Once again, Glynis has posted some helpful links inside of chat.

Following Provider Support for those two help desks comes our next team, and that's the Payments team. The EN Payments team covers EN compensation as led by Nicole Black, our Payments Manager.

In 2023, the EN Payments team processed just under 314,000 cases, including payments, denials, diaries. This was around $140.5 million clearing the Treasury, including $14.8 or so million in reconciliation payments.

And to reach them you also use the EN Payments Help Desk contact information, that phone number and email address I provided earlier, and include the EN PID in the line along with the Portal SSA reference number. They request five days for case research and response.

Let's look at some tips from EN Payments. When you think of the payments world and processing payment cases within 30 days of receipt, they do a lot of work.

They cover Ticket Portal payment requests, the quarterly ePay, manual payment requests, payment denials, overpayments, split payments, and reconciliation payments. All around that's over $14 million clearing Treasury in a single year. They also do some administration production, including quarterly All EN Payments Calls which you all attend, and updating the payments resources annually to assist ENs with accessing those through the website.

Let's look at some tips from EN Payments. For EN Payments, using the TPA Change Form is important to update your contact information so you can receive outreach emails from the EN payments Help Desk. Receiving email from them is critical. Make sure you use that TPA Change Form. After submitting that request, please monitor your email for a response from TPM; and, when you get it, respond right away.

ENs can mail in proof of earnings in response to an outreach email asking for clear and legible documentation.

The third tip is to remember to request a payment no later than 24 months following the month the Ticketholder's work and earnings meet the criteria for payment ─ That's one of those policy areas to remember ─ no later than 24 months.

The Ticket Portal is the fastest and recommended way to manage payments. You can track payments in real time. This tip is highly recommended.

And for the All EN Payments Call, consider submitting your topic areas to the EN Payments Help Desk. That will help them generate the agenda for that event. You can visit the recaps for important information and updates in the event archives. When you think about the EN Payments Call, the next one is scheduled for May 7 From 1 to 2 p.m. Eastern time. You can add that to your calendars to make sure you join that important meeting.

Let's go now to our final team, the Communications and Outreach team. These folks do the marketing tools to help identify interested beneficiaries to participate in the Ticket Program. This is led by Jayme Pendergraft, our Director of Communications and Outreach.

In 2023, this team hosted 12 WISE webinars with over 4,000 attendees, gained nearly 12,000 text messaging subscribers, and published 36 blog posts with about 117,000 unique page views.

To reach this team to submit success stories, use stories@ choosework.ssa.gov. And for other questions, you can reach out to Jayme directly at jayme.pendergraft@cognisante.com.

Let's look at their task areas. Here we have the ongoing nationwide effort to access Ticketholders and educate them about the benefits of participating in the program. They cover GovDelivery messages, social media platforms, text messaging campaigns, Ticketholder success stories, work incentive seminar, or WISE events, and also do targeted email outreach and blog posts.

Let's now look at the tips for this Outreach team. Here we have four. We encourage you to share social media posts. When you share, it amplifies reach. And when this happens, we see increased registrations for WISE and increased inquiries to the helpline. It's a rippling effect and it could save you some time in your marketing efforts as well.

You could also use the content that is from our GovDelivery email messages.

We do seek success story leads. As I mentioned, you can email us those candidate ideas for success stories. They have had to work their way off of benefits and be in their extended period sf eligibility. We also have a stepping Stones category of stories. This candidate criteria is a little bit reduced. If you have those ideas, you can send them to us through that email address.

The Outreach team is also interested in hearing from you about what you need. Do you want to see different content or different topics? Let Jayme and the Outreach team know, and they'll be able to either send you resources or perhaps develop something new to meet your needs.

If you aren't following the GovDelivery emails, we encourage you to do so. The public government ─ GovDelivery email list is at choosework.ssa.gov/contact. Or you can sign up for the service provider content by emailing ENservice@ssa.gov .

Next, we have a scenario that will show you how all this moves in motion. I'll go through it somewhat quickly so we can get to Q&A. But it's good to see how these overlaps and handoffs work. Next slide, please.

In this scenario, what we have first is onboarding new EN staff. Here we have Sheila. She's joined ABC Employment Network and as the new Ticketholder contact and will be a Ticket Portal user. They know Sheila must complete the EN Foundations training and gain access to the Ticket Portal.

So, the ABC EN emails EN Service to ask how to start onboarding. EN Service advises ABC EN to complete a TPA Change Form. And then ABC EN should complete Section 4, EN staff information, that Sheila is a new employee; and Section 3, EN contact information, to add Sheila as the new Ticketholder contact; and also Section 5, EN Portal users, to add Sheila's as a new in Portal user. This should be submitted to the EN Service within 24 hours of Sheila joining the EN. The forms are the first step. Let's go to the next slide, please.

With that, upon receipt, EN Service processes that TPA Change Form and adds Sheila to ABCs EN staff. EN Service then sends an email to the Development and Training team, instructing them to enroll Sheila in the EN Foundations training. Thomas is an analyst on that team, and he enrolls Sheila in the Portal learning pathway and sends her a Welcome to EN Foundations email, along with the orientation date. This begins the 60-day training process that she has to pass suitability, gaining extra security and then be able to access to get Portal. Next slide.

The second part of the scenario is the first Ticket assignment.

Sheila completes the EN Foundations training and all the requirements for accessing the Portal. She's now ready to assign her first Ticket, but she's unsure of a couple of things. And she wonders whether she needs to undergo the Ticket Assignment Review Process because she's a new employee. She also has some questions about the goal section of the IWP she's developing and would like the IWP reviewed before submission.

On the next slide, Sheila contacts her Training and Activation Analyst. Thomas says she doesn't have to go through the TAR because she's with ABC EN. It's not a new EN. Thomas also informs her that the IWP can be reviewed by the Program Integrity team.

So, she submits through GSO the cover sheet and the IWP to Program Integrity. Jenna from the Program Integrity team reviews the IWP and suggests some changes, some recommendations on the goals. And then, after revising the IWP, Sheila assigns the Ticket via the Ticket Portal.

Now, on the next slide, we have the first payment request, the final part of the scenario.

Sheila's ready and excited to submit her payment request, and she has been studying the resources on the website and the Ticket Portal User Guide. Then she tries to submit the payment request but gets an error message. Sheila reaches out to the provider support helpline and talks to them.

Laura on the team informs her that she will need to submit a manual payment request along with a screenshot of the error message and fax that to the help desk. So, with that, Laura points Sheila to the Payment Request Form on the website.

Sheila completes and faxes that form, and Laura receives the fax and reviews the information; and Laura sends the payment request to the EN Payments Department for processing.

Here we contacted five of the six TPM departments in this scenario showing how Laura can engage with different staff at different time, all with customer-facing services.

I've covered a lot. It's taken a little while. I appreciate your patience in the review of this material. I'm going to bring Ana back in so we can make sure your questions are addressed to our team leaders. Thank you so much. Ana.

Ana Morales: Thank you, Derek. We are now ready to start the Q&A. Let's go to the next slide, please.

As a reminder, you can ask questions in several ways using the MS Team's chat section, as many of you have already done. Thank you for your questions. You may also ask a question over the phone. Please raise your hand on Teams by dialing star 5. When you are called, you will be unmuted by the facilitator, and then you can press star 6 to unmute yourself. Remember, this is a two-step process. And, for participants joining us on the Teams app, you can ask the question by using the raising your hand feature. Identify yourself by name and the EN's name.

I know that we don't have too much time for questions, and we ask you to limit your questions. And if they don't get answered, please email ENoperations@yourTickettowork.ssa.gov .

Let's check with Katherine. Do we have any raised hands?

Katherine: Hi, Ana. Thank you. No, ma'am, we do not have any raised hands at this time. So, if you'd like to ask a question, just raise your hand by clicking the raised hand icon. Thank you.

Ana Morales: Thank you, Katherine. Brittney, do we have any questions from the chat that we would like to ask out loud?

Brittney: Yes, Ana. We do. I have a question from Holly. What would happen if a staff can't get suitable within 60 days? Who do they contact? I'm assuming she wants to know who to contact because they've had someone that's been waiting for four months, and they're anxious to know who to contact.

Ana Morales: I was thinking, is that question based on the training or based on in general. All the questions about suitability and the status, they have to go directly to the Suitability office. And we can post on the chat that email address. Glynis or Brittney, if you have that handy can you please add it to the chat. But the Suitability office of Social Security is the one in charge of all suitability questions and statuses.

Brittney: Okay.

Ana Morales: Do you have another question, Brittney?

Brittney: We do have another question from Sandra that was asking, is there a default disclosure that SSA allows the ENs to use in their email template?

Ana Morales: Erinn, do you have a suggestion for that question?

Erinn: Sorry. Could you say that one more time?

Brittney: Sure. Is there a default disclosure that SSA allows the ENs to use in their email template?

Erinn: Okay. I don't believe so. But I'm going to take that question back and check with a couple of other people, just to make sure. And then I can get back to you.

Ana Morales: Thank you, Erinn.

Brittney: And I believe we have one more question. The new RFA section on the Form 222 refers to being granted an SSA device to perform work. Does this refer only to devices actually from SSA or to an EN device used to work on Ticket activities?

Ana Morales: Erinn, would you like to take that one?

Erinn: All right. Could read the very, very first part of that question again? I got the last part about whether or not we're talking about SSA devices or EN devices. I just didn't hear the very first part.

Brittney: Okay. It says, in the new RFA, on the section that talks about the Form 222, it refers to, in quotes, being granted an SSA device to perform work. And they want to know if that refers only to devices actually from SSA, or is it an EN device as well that they may use for their Ticket program services?

Erinn: Okay. So, sorry. I would need a little bit more context just to know what is their specific -- Words are escaping me right now. Is there a specific thing that you're restricted in as far as performing with those devices? I would need a little bit more context. Let me take a look again at the 222 Form. And, again, I'll get back to you about that question. Sorry about that.

Melanie: And this is Melanie from SSA. I was going to say, for both of those questions, if there is any further clarification that either of the ENs who asked those questions could provide, that would help us. In reference to the second one, Erinn, I think that was updated language in the RFA. And if I'm thinking of the appropriate section, I know there is a reference where it's talking about Security Awareness Training in general. There is a section that talks about contractors, and those would be SSA issued laptops because there's additional training that's required. So, it would only apply to SSA-furnished equipment. If that is not your question, if you could just reference the page or the section of the RFA that you're talking about, that will help us look into it. And then also, I just wanted to ask the first EN who asked the question about whether or not there was disclosure language that could be included, I wasn't sure which email or template they're talking about. I don't know if that information was included in the chat. But, if not, that would also help us answer that question if we just knew which email or template or disclosure language they're referencing. Thank you.

Ana Morales: Thank you, Mel and Erinn. You can send that information to ENoperations@yourTickettowork.ssa.gov. And we will be sure to share that with Social Security.

Laura: Hey, Ana. This is Laura from SSA. Just curious if the person who asked about suitability could send the specifics of their situation such as any follow-up they received from suitability, or if they haven't received any follow-up, if they could send that to TPM, and TPM, if you could send that to us, we'll look into it.

Ana Morales: Sure, thank you. And Glynis also posted the information for the Center for Suitability and Personal Security, different ways for you to contact them. And that information is in the chat. But yes, please share your specific question with us, and we will also share that with Social Security. Katherine, do we have any raised hands?

Katherine: Hi, Ana. No, we do not at this time.

Ana Morales: All right. Glynis, any other questions that we should ask out loud before we end the call?

Glynis: No, I don't have any.

Ana Morales: All right. Well, we want to thank you all for joining us today. As a reminder -- oh, next slide, please. As a reminder, we have some upcoming events on April 16. We have the quarterly All VR call on April 24. We have a WISE webinar May 7. We have the quarterly All EN Payments call. And, on May 15, we are going to have another EN Essentials Training. And that's going to be Spring Into Marketing but Start With a Plan. You can check our calendar of events that is posted on the website to keep joining us for all the sessions.

And if you have colleagues that want to access these trainings, we have all the recordings in our EN Essentials page on the service provider website that include the slides, the audio, and the transcripts.

And on behalf of the Ticket to Work team, I would like to thank our presenter, Derek, Social Security, TPM staff, and all of you for attending today's training and this interactive session.

If you have any feedback, recommendations, other ideas for training sessions, please email us at EN Operations at yourTickettowork.ssa.gov.

This EN Essentials Learning Event has now concluded.

Thank you for joining us.