EN ESSENTIALS TRANSCRIPT
JANUARY 21, 2026

Annual Performance Outcome Report (APOR) and SSA-222 Security Awareness Certification

Derek Shields: Welcome to today's EN Essentials training, the Annual Performance Outcome Report, or APOR, and SSA-222 Security Awareness Certification. My name is Derek Shields. I'm with the Ticket Program Manager. As today's moderator, I welcome you to the session that will review specifics of Employment Network responsibilities regarding both the APOR and the Security Awareness Certification. Let's now review our agenda specifics on the next slide.

Today we're going to have three sections. We'll start out with our customary logistics and introductions, followed by a brief presentation on the Ticket Evaluation. An update will be provided on the Ticket Evaluation that will be followed by our first Q&A session. Following that, we'll proceed to cover the Security Awareness Certification Collection Process. That will have the second Q&A immediately following. And the third section will be the Annual Performance Outcome Report, or the APOR Process, and we'll have a final section to cover questions regarding the APOR Process. So three topics, three Q&A sessions, and plenty of time to answer all of your questions for each of the three areas.

Before we begin with those specific presentations, let's now take a moment to review our logistics for today's session on the next slide. First, TPM is recording and capturing the transcript from today's meeting, and we'll make it available to you on the Your Ticket to Work website under the EN Essentials Learning Events area, as we customarily do. Next, please feel free to engage and ask questions. We can use the MS Teams chat section.

Further, we'll have a Q&A portion that will allow you to raise your hand and ask questions that way as well. Closed captioning is available for participants who join using the MS Teams application or by using the Closed Captions link provided in both the GovDelivery email announcement and in chat earlier by Glynis. To turn on Closed Captions in MS Teams, please use the three ellipses at the top of the MS Teams menu, then select More, scroll down the list to Language and Speech, and select Turn on Live Captions.

Further, when using the link option, please cut and paste that into a browser of your choice, and it will open a separate window to view those closed captions in an extended format. Per the Ticket Program Agreement Part 3, Section 11, Subsection I, EN staff are not permitted to record this meeting nor to capture the transcript. We will, of course, provide the materials and the summary on the EN Essentials Learning Events page, and we encourage you to access that for your notes.

All right, with those logistics covered, let's now turn to introducing today's presenters. As I mentioned, I'm Derek Shields. I'm with the Ticket Program Manager, and I'm today's moderator. I'm being joined today by three presenters. We'll have Ellie Stinnett, an Economist in Employment Support with the Social Security Administration. Ellie will be covering the Ticket Evaluation update. Following her Q&A session, we'll be joined by Terry Simpson, the EN Service Support Manager with the Ticket to Work Program Manager. And Terry will be covering the SSA-222 requirements. And finally, we'll be joined by LaKesha Hunt, our Program Integrity Project Manager at TPM, to cover the APOR process for this year's cycle.

With those introductions in place, let's now move to the next slide, and I'd like to welcome Ellie Stinnett to provide our update on the Ticket Evaluation. Ellie, over to you, please.

Ellie Stinnett: Good afternoon. SSA is conducting an evaluation of the Ticket to Work Program. The evaluation will help SSA understand program best practices and identify potential improvements. So in the next few months, our contractor, Mathematica, will be fielding a survey with service providers like you to learn about your experiences with the Ticket to Work Program. Mathematica will also be conducting interviews with beneficiaries to learn about their experiences with both Ticket to Work and the WIPA programs. So you or your clients may be contacted to participate.

On the survey, this will include all ENs, but there can only be one submission per Employment Network organization. So one person at each organization will be invited to take part in the survey on behalf of the whole organization. In general, this will be the person named as the Program Contact for each organization. So the Program Contact will receive an email containing a link to complete the online survey. And if this person needs support from colleagues or to designate another staff person to complete the survey, that is okay. You can forward that link.

Mathematica will offer a $40 check for completing the survey, but you can decline the check if your organization's rules prohibit you from accepting it. But if you do receive the invitation, we encourage you to participate so we can learn from your experience.

For the interviews, the beneficiary interviews will include up to 100 Ticketholders. Mathematica will select the interview respondents based on predetermined criteria. They will receive a letter and a telephone call inviting them to participate. And Mathematica will offer a $40 gift card to Ticketholders to complete the interview. So if a client of yours is contacted, please assure them of the legitimacy of the study and encourage them to take part.

We hope that you will respond to the survey so we can get your input to help us understand how the programs are working and how they might be improved in the future. And we expect to administer the surveys and conduct these interviews in the spring of this year. I can take any questions you have now, or I've placed my email and the email for Seth Hartig below. And you're welcome to email us any questions that you might think of later.

Derek Shields: Thank you so much, Ellie, for reviewing the survey, and interview schedule, and details for everyone today. With that, let's move to the next slide. And we would like to just remind you how to participate with questions. Of course, you can use the MS Teams chat, and we can drop them in there and have any questions answered. You can also ask via telephone using Star 5 to raise your hand, and then we will unmute you and you will need to use Star 6. It's a two-step process.

If joining via Teams and you'd like to ask a question, you could use the Raise Your Hand feature and we'll call on you. And with that, we ask, please limit your questions to one participant. And as Glynis put in for all of our Q&A today, please refrain from answering questions that are intended for our presenters or SSA colleagues. And with that, we have a couple items that are here. May you please tell us what the subject line will read for the survey? This question was posted by Jill in chat. Ellie, any response for that?

Ellie Stinnett: I'll have to get back to you on that. I don't know off the top of my head, but I will figure that out and communicate that to this team, and they can send that out in whatever your normal communications is.

Derek Shields: Thank you, Ellie. So we'll get a follow-up to that. I did hear you say this will be in the spring of 2026, and so we have a little time to get that information available. And then Ray mentioned, just to confirm, are the individuals in this survey active Ticketholders or unassigned Ticketholders?

Ellie Stinnett: So the survey will be going just to ENs, and they'll be asking you questions about your services and your experiences. For the interviews, we will be talking to people who have used the Ticket or WIPA programs in the last year and a half or so. So some of them might not be active anymore, but they will have had recent experience that they can share.

Derek Shields: Thank you, Ellie. Karen asked, should we be contacting participants to tell them about this?

Ellie Stinnett: I don't think that's necessary because we are only doing 100 interviews. But we hope that if your client reaches out and says they've received outreach about this interview, that you'll encourage them that this is a legitimate study and that they are welcome to participate and it would be helpful to SSA to get their information.

Derek Shields: Thank you. This is Derek, again. Is there any information from the Ticket Program that we can provide to our Ticketholders to see if they are interested? It's similar to the question before. I'll add a follow on that. Is there any information that would be provided to reinforce that the Ticket Evaluation is legitimate? So if a Ticketholder is receiving a request, can the ENs be supporting that through an awareness effort?

Ellie Stinnett: Yes. So on the SSA website, we have a page for the Ticket to Work evaluation, and we have, on that page, information about the surveys and interviews. So you can direct them to that site for additional verification. We will be selecting the Ticketholders based on our predetermined criteria. So we don't need ENs to solicit interest, but we certainly appreciate your willingness.

Derek Shields: Thank you, Ellie. A question for Mary, what type of questions are you asking the EN and the Ticketholders?

Ellie Stinnett: So to the ENs, we'll be asking you about the services you provide and how often you provide those services. We'll be asking you about different aspects of working with SSA, how those are going, and then your ideas for improving the program.

For the beneficiary interviews, we will be asking them about their experience broadly, what their expectations were when they came into the programs, what they hope to gain from them, whether or not they were able to get the services they needed, whether their goals when they joined were met or what additional support they might need to meet those goals — really trying to understand where the Ticket program is succeeding and where we can be making improvements, and then specifically ideas for what those improvements should be.

Derek Shields: Thank you. And it looks like we have a final question from Michelle. Is it possible to get the questions ahead of the survey? I think we're talking about the EN-facing questions. So we can gather information from others in the organization to provide better responses. Do you have any information about the sequencing there?

Ellie Stinnett: So it's not possible for us to send them ahead of time, but once you receive the link to the survey, you can exit the survey and come back into it multiple times. I think the survey is going to be open for about six weeks, so I think you'll have enough time to be able to collaborate as needed. But if for some reason you run into a problem, please let us know.

Derek Shields: Thank you. And a couple more questions have come in from Sonia. Will Ticketholders be notified by email or U.S. postal mail?

Ellie Stinnett: They will receive a letter through U.S. postal mail and a phone call.

Derek Shields: Thanks. And a question from Stephanie about the criteria. What is the predetermined criteria for the 100 Ticketholders that you'll be identifying for interviews?

Ellie Stinnett: So I don't know all of them off the top of my head, but we're looking at people who have interacted with the Ticket to Work or WIPA programs in the last few years, and then we will stratify them based on their demographics like impairment type, their age, et cetera, to try to make sure we get perspectives from people who would have different needs from the program.

Derek Shields: Thank you, Ellie. And one final question for Ellie from Jennifer. Was that 100 Ticketholders per EN or 100 Ticketholders in total?

Ellie Stinnett: That is 100 Ticketholders in total. We have other data collection from Ticketholders previously, so we are using some of our past experience and just trying to dig in with this small group of 100 Ticketholders.

Derek Shields: Thank you so much. And just to reinforce, while we'll move on to our next presenter and topic today, we have two email addresses that were placed in chat before we received all these questions. It is Eleanor.Stinnett@ssa.gov and Seth.Hartig@ssa.gov. They encourage you to send additional questions their way so they can ensure you have the information you need.

So with that, I'd like to thank Ellie. I believe you might be staying around for the other Q&A, but with that — Glynis has just placed those email addresses again so they're at the bottom of the chat for everyone to access. So thank you, Ellie, for your presentation on the Ticket evaluation. We look forward to that work this spring.

Ellie Stinnett: Thank you.

Derek Shields: And with that, if we can move forward to the next slide, please. As previously advertised, we've come to the Security Awareness Certification collection process portion of today's EN Essentials training. And for that, I'm going to welcome my colleague, Terry Simpson, the EN Service Manager, to provide you the details for the process. Terry, welcome.

Terry Simpson: Good afternoon to everyone. Thank you, Derek. I appreciate that. Once again, my name is Terry, and I'm here to speak to you about the Security and Privacy Awareness Training. Per the TPA, all EN employees, as well as contractors and subcontractors, and/or affiliate partner personnel who will have access to Social Security information must complete annual certification in security and privacy awareness. The certification involves reading, understanding, and signing the Security Awareness Form SSA-222. Next page, please.

There are two forms involved in this process. The SSA-222 is used to certify that the signer has received and understands the SSA Information Security and Privacy Awareness Training. All EN employees, including contractors, subcontractors, and affiliate partner personnel, must sign and date the Form SSA-222. All ENs must keep signed copies of Form SSA-222 for all staff at the EN location.

The Form SSA-222 Addendum is used to certify that the staff listed on the form have completed Form SSA-222. ENs with more than one staff must complete the SSA-222 Addendum. Only the Signatory Authority or Suitability Contact can complete and sign the SSA-222 Addendum. No other signatures will be accepted. They will be rejected if received. Once again, only the Signatory Authority and Suitability Contact can sign and date the Addendum. Next page, please.

These forms can be found by going to YourTicketToWork.ssa.gov as shown in the screenshot. Choose Resources from the top menu. Choose Forms on the left-hand side of the screen. The SSA-222 Form and the Addendum are located under the Maintenance heading. Next page, please.

Who will complete the form? All EN staff must review, complete, and sign the Form SSA-222 regardless of their suitability, their portal access status, or when they last submitted Form SSA-222. That means whether you're a new employee or old employee, whether you completed the form last week or last month, during this process, you must complete Form SSA-222. And how you complete it, you will download the form, complete the fields on Page 5, which is the signature page, type in information. Do not complete the form by hand, please. Sign the form with an electronic or wet signature. For more information, simply go to the Signature Instruction page. Next page, please.

For 2026, all ENs must sign and submit the Security Awareness Form or the Addendum during the collection period. The collection period starts no earlier than January 26, which is Monday. And the period ends no later than February 23. Once again, it begins this Monday, no earlier than that. Forms signed with the date outside of the collection period will be rejected. You will need to submit a new form signed within the collection period if you send it prior to Monday. Next page, please.

ENs with more than one staff must complete the Addendum. Only the Signatory Authority or Suitability Contact can complete and sign the Addendum. How to complete it: simply download the form, list all EN staff — as stated before — who have completed Form SSA-222, including the individual who's filling out the form. That means the Signatory Authority and the Suitability Contact must be listed on the lines shown in this screenshot.

The date column should match the signature date on each Form SSA-222 completed by the employee. Those are the forms that are staying at your EN location. Each of their names and dates must be listed on the Addendum. Type the information. Please do not complete the form by hand. It must be typed. Sign the Addendum with an electronic or wet signature. For more information, go to the Signature Instructions. Next page, please.

Adding additional pages. We want to make sure that all employees are listed in this process. So simply click Add Additional Employees, which is shown in the screenshot with an arrow. Click that option as many times as necessary to add all employees during this process.

To review the submission process, all ENs must review, sign, and complete Form SSA-222 on file at the EN location. All of those forms must remain on file at your EN location. Forms must be signed and submitted during the collection process, which, once again, begins this Monday, January 26, and ends February 23. You must complete the process during those dates. ENs must submit Form SSA-222 to TTW222@ssa.gov. That is the only mailbox where you should be submitting your forms. For ENs with one staff, submit only Page 5, which is the signature page of Form SSA-222. For ENs with more than one staff, submit only the Addendum. Please do not send the Form SSA-222 with your individual staff when you have more than one staff. You only send the Addendum to the mailbox. Send any related questions also to TTW222@ssa.gov.

Please include your EN PID on the subject line of all emails. That includes inquiries and the actual 222 forms and Addendums. Please include your EN PID. That helps us to be able to keep track of all emails. Failure to complete the Security Awareness Certification by February 23 could result in consequences because it is a violation of your EN TPA. SSA could limit your ability to assign Tickets, receive payments, or terminate your TPA. Next page, please.

Back to you, Derek. Thank you.

Derek Shields: Thank you so much, Terry, for reviewing the SSA-222 process, and appreciate you going through everything. There are some questions, and we're going to get to all of them, and we'll bring the next slide back up for you. Prior to doing that, let's just remind folks how to participate in the questions. So let's go to the next slide first.

Feel free to ask questions using chat. So far, we've seen about 12 or 13 questions placed into chat. We'll be getting to them. If you're joining by phone, it's a two-step process. Use Star 5 to raise your hand. You'll be called on, then need to hit Star 6. If with MS Teams and you wish to ask a question, you can use the raise your hand feature, and you'll be called on by Katherine, and we'll unmute your mic.

We do ask you to limit one question to one participant, and you can send additional questions or comments outside of this forum to TTW222@ssa.gov. That was also cut and pasted into the chat. With that, let's go to Katherine. I believe we have a raised hand, Katherine.

Katherine: Hi, Derek. Yes, we have Gabby. Gabby, you have access to your audio. If you'll just click your microphone up top and unmute and ask your question.

Gabby: Thank you. So we have two ENs, and all of our staff work on both ENs. So last year we submitted two separate Addendums, one for each EN. But my question is about the SSA forms that we're storing. Is it okay to just write both contract numbers and have everybody sign one SSA form?

Terry Simpson: You need to keep everything separate. Each EN is a separate entity as far as the process that we go through here at EN service. So you will need to have separate forms for each EN PID.

Gabby: Okay. All right. Thank you very much.

Terry Simpson: Thank you for asking.

Derek Shields: Thank you, Gabby, for the question.

Katherine: Thank you, Gabby. Sorry, Derek.

Derek Shields: No problem at all. Any other raised hands at this time, Katherine?

Katherine: We have one. We have Diane. Okay. Diane, you have access to your audio if you want to unmute and ask your question.

Diane: Hi there. Can you hear me?

Katherine: Yes, ma'am.

Diane: Great. Thank you. So I just want to clarify, because over the years things have changed.

So the SSA-222 is kept on file, and assuming that there's more than one staff member, we have two plus our Signatory Authority. So in that event, I return the SSA-222 Addendum. Everything has to be signed and dated, the same date via email, correct? To the address that's specified.

Terry Simpson: Correct. The Signatory Authority or the Suitability Contact will complete and sign the Addendum for everyone on staff and send it to the TTW222@ssa.gov email address with, of course, your PID and the signature line.

Diane: Great. So, again, just to confirm, I'm the contact, the Program Contact, and then there's one other young lady who works with me, and then we have the Signatory Authority. So on the Addendum, all three of us are listed, correct?

Terry Simpson: Correct.

Diane: Okay. Just want to make sure. I made that mistake one year, and I don't want to make it again.

Terry Simpson: Yes. Thank you for asking. All three of you will be listed, and either the Signatory Authority or the Suitability Contact must sign and submit the Addendum.

Diane: Terrific. Thank you very much.

Terry Simpson: You're welcome.

Katherine: Thank you, Diane.

Diane: Thank you.

Katherine: You're welcome.

Derek Shields: All right. At this time, we're going to switch over to the questions in chat, which, as I mentioned, there are a few. Prior to doing that, one of the questions we had was, could we put a slide back up? If I could get Rose to move backwards two slides, please.

She's about to do it right now. And we have the submission process slide back up. A lot of folks were interested, I think, in seeing those details during the Q&A, so we'll leave those there for now. I'd like to ask Brittney to come in. She's been monitoring the chat and will provide questions from the chat so Terry has an opportunity to respond. Brittney?

Brittney: Yes, Derek. We have one question from Christine. If a company employee has no involvement with the Ticket to Work Program, must they complete the form?

Terry Simpson: This process is for people who are part of the Ticket to Work Program. If they have any involvement in the Ticket to Work Program, we have them listed as employees for your EN. If they have anything to do with any of the process for your ENs involving the Ticket to Work Program, they must be on the Security Awareness form.

Brittney: Thank you. We have a question from Bradley. Do we need to add an employee to the Addendum who is currently in the fingerprinting process?

Terry Simpson: This process is for everyone, regardless of their suitability, clearance status, their portal status, anyone involved in the Ticket to Work Program must be included on your Addendum. So, correct. If they are still in the fingerprinting process, if they are part of your program, they need to be on the Addendum.

Brittney: Thank you. The next question is from Megan. If we have multiple locations, do the forms get stored at one location or in each office location?

Terry Simpson: I believe they are stored at your main location, but I defer to SSA to answer that question.

Erinn: Hi. That is a great question. And, Mel, feel free to chime in. I think it would be fine to store a signed SSA-222 at an actual Ticketholder service location, just because I know that sometimes those can be kind of all over the place. But, Mel, if you have a different opinion, please let me know.

Mel: I would agree. I think from SSA's perspective, we just want to make sure that you have every employee sign one and it's on file. So, at any time, if we were conducting a site visit or we needed those upon request, you would be able to get it to us. So if it makes sense to have it onsite at your location, and that's easier than going through a centralized office, it just needs to be on record for every employee, a copy of it. So, I would agree, Erinn.

Derek Shields: Thank you. Thank you, Mel, and thank you, Erinn, for addressing the question that Brittney was reading there. And, as folks may or may not be able to access chat, just to describe that many answers are coming from Erinn in chat and also from our colleague, Ana. So, thank you to both of you for providing those responses. Brittney, back to you for our next question, please.

Brittney: Yes, staying on that topic, we have a follow-up question that came in regards to storing them. Can they be stored electronically in an approved cloud system?

Terry Simpson: Paper files need to be on site so that, as Mel said, if there is a service site visit, you will have that document available for them, whoever the visitation crew is, to actually see the paper document.

Brittney: Thank you, Terry. We have a question from James. He's asking, can you repeat if we have multiple employees, do we submit both the SSA-222 and the SSA-222 Addendum or just the Addendum?

Terry Simpson: If you have multiple employees, you keep their individual SSA-222 forms on file at your EN location. You only send the Addendum. And once again, you're sending that to TTW222@ssa.gov. Please include your PID on the email, but for multiple employees, only the Addendum comes to us.

Brittney: We have a question from Kevin. Can the Addendum have a wet signature?

Terry Simpson: The wet signature of the Signature Authority or Suitability Contact is allowed, but the dates within the form itself must be typed. The names and dates on the top of the form must be typed.

Brittney: Thank you. I believe we have answered all of the questions from the chat thus far, Derek.

Derek Shields: Thanks, Brittney. We'll give you a chance to go back and review and do an inventory there. In the meantime, let's go over to Katherine. It looks like we have a raised hand for a question. Katherine.

Katherine: Hi, Derek. Diane, you have access to your mic if you'd like to ask another question.

Derek Shields: Yeah, Diane's hand has actually been up the whole time, so let's go to question number 2.

Katherine: Sounds good. Thank you.

Katherine: All right, Michelle, you have access to your mic if you just unmute.

Michelle: Thank you.

Katherine: You're welcome.

Michelle: I have a question about the — you mentioned having the actual signed paper form, and we have for the last few years used an online learning platform similar to Blackboard, to complete the SSA-222s for all of our folk. So they're stored electronically and their signatures are logged electronically through that system. Is that no longer acceptable?

Terry Simpson: I defer to SSA to answer that question.

Erinn: I'm sorry. This is Erinn again. I'm probably going to pull in Mel again for this question. We ask that you have the signed copies on site. So traditionally that has meant that you have those hard copy signed forms.

Erinn: Mel, I'm not sure if you have an opinion, if they have access to the form, if they have the ability to print the form by request whether or not we would accept that?

Mel: Yeah, I think we can send out something official, but to me it seems like in the world of just cutting down on paper, as long as we have every employee signing those documents and they are filed in a secure location then… then that seems reasonable. But we will make sure that we send out an answer in writing just so that everybody has the same information.

Michelle: Okay.

Derek Shields: Thank you, Erinn.

Michelle: I just wanted to make sure that I'm understanding that the response was, it is okay to use an online learning program similar to Blackboard, where you assign that — the assignment of completing reading and understanding the form and then they digitally sign that they have completed it. That is acceptable?

Erinn: Sorry, I realize that we didn't answer your question fully. So it might be something that we need to talk about offline just because it's very specific. I guess the answer would depend on whether or not that process creates a situation where they are digitally signing that form. If that is the case, then that process should be fine. But if it doesn't create a digital signature on that form, then no, we need that form, that actual form, signed.

Michelle: Okay, thank you for the clarification.

Brittney: Thank you, Michelle.

Derek Shields: Yeah, thanks Erinn and Mel for jumping in again. And thanks, Terry. Let's go back to Brittney. We have a few more minutes here for this certification process questions. Let's go back to the chat. Brittney, next question for Terry or Erinn.

Brittney: We have a question from Anthony. Does the office receptionist that transfers calls and take messages need to be included?

Terry Simpson: If she's not part of the Ticket to Work Program, no, she does not need to be included.

Brittney: Okay. We have a question from Felicia. Does the Addendum need to be encrypted when it's sent?

Terry Simpson: Please do not encrypt the Addendums. The Addendums nor the 222 Forms need to be encrypted. Just send them as an attachment in an email with your EN PID in the subject line. Thank you for asking that question. Please do not encrypt them.

Brittney: Thank you. And I guess this is more of a reiteration. Amber Star is asking, are employees required to have a wet signature or is the digital signature acceptable?

Terry Simpson: A wet signature or a digital signature are accepted as long as — if they're referring to the Addendum — as long as it is the Signatory Authority or Suitability Contact.

Brittney: Okay. We have a question from Tina. They have a new employee that they need to send in the SSA-222 and the Addendum for her since she's just starting.

Terry Simpson: Yes. Everyone, including new employees in any form or process during the valuation of the employee; whether they are suitable, whether they're portal users, any employee involved in the Ticket to Work Program needs to be included.

Brittney: Okay. Kari asked a follow up question in regards to the receptionist question. If the receptionist is asking for name and information to direct the call appropriately, do they need to sign the SSA-222?

Terry Simpson: I defer to SSA to answer that question.

Erinn: Hello, again. So I would say it depends on how much information this receptionist is collecting. If they're purely asking for their name generally and kind of who they want to be transferred to or just generally if they're calling regarding the Ticket Program just to be able to transfer their call, then no, they're just trying to get the bare minimum information to transfer the call. But if they're taking any kind of intake information or anything like that where you would really consider them to be kind of part of the team that is working on Ticket to Work, then, yes, they should be included on the Addendum and they should complete the 222.

Derek Shields: Thanks, Erinn, for that. A bit of a differentiation. The collected content is part of an intake process. Then you would want to make sure that that person was included. If it's just a redirect, the receptionist doesn't need to be included. We have about two minutes left for this Q&A session and we have one more hand raised. It doesn't mean we won't get to your questions in chat. We can address those through chat and bring you back in a little bit later. But let's go to Katherine now for one more question from the raised hand, please.

Katherine: Hi, there. Thank you. Amber, you have access to your audio if you'd like to unmute.

Amber Star: Thank you so much. And I apologize. I just wanted a little clarification. I know the SSA Form, all employees sign that. And then the Addendum, the Signatory Authority or the program manager, I believe it is, can sign off on the list to send off to SSA digitally or wet. I just wanted to confirm that the SSA-222 signed by employees can have a digital signature or a wet signature. Sorry about my confusion.

Terry Simpson: The SSA-222 Form signed by individual employees can have an electronic or wet signature. But please let me correct you about the Addendum. The Program Contact is not involved in signing the Addendum. Only the Signatory Authority or Suitability Contact can sign the Addendum.

Amber Star: I knew I had the second one wrong. I'm so sorry about that.

Terry Simpson: That's okay. That's why it's in written form and you can —

Amber Star: On both of those.

Terry Simpson: — check the signature instructions.

As long as you check all your resources after listening to this, you can end up with the correct process in the end. And if it's not correct, we will be sending it back to you. So not a problem.

Amber Star: Thank you. I appreciate it.

Terry Simpson: No problem. Have a good day.

Katherine: Thank you, Amber.

Derek Shields: Thanks, Amber, for the question. I'm sure other people benefited from your question as well. And thank you, Katherine and Brittney, for your help. At this time, I'd like to say thanks, Terry. We'll bring you back for our final Q&A. I'm sure there'll be more. And in the meantime, we'll continue to address your questions in chat. Rose, if we can move forward to —

Terry Simpson: Thank you, Derek.

Derek Shields: — our next section. We'll now introduce LaKesha, from our Program Integrity Department. And LaKesha will be providing information on this year's APOR process. Following this, we'll have another Q&A that will start with LaKesha on the APOR process. And then we could bring in any follow-up questions on the Ticket evaluation or the 222 process as well. With that, LaKesha, over to you, please.

LaKesha Hunt: Good afternoon. Thank you, Derek. And as Derek mentioned, today I will be going over the Annual Performance Outcome Report, which will often be referred to as the APOR, throughout this presentation. So next slide. So what is the APOR? The APOR is a report issued annually that compiles information provided by each Employment Network, ENs, on outcomes achieved with respect to services offered to Ticketholders. In addition, some information provided in the APOR is used to populate the Find Help tool. Next slide.

Completing and returning the APOR is a TPM mandatory. As per the TPA, Part III Section 9(B), the EN shall provide an APOR to the TPM on an annual basis in a format prescribed by SSA. The APOR shall provide information on outcomes achieved by the EN with respect to services offered by the EN to beneficiaries, as well as information related to TPA administration. The following service providers are required to complete the APOR. So that will be our State Vocational Rehabilitation agencies, VRs, and ENs, with agreement award dates in the calendar year of 2025 and 2026. Next slide.

The APOR will be sent to ENs on Monday, this coming Monday, January 26, 2026. You will then have approximately 30 days to complete and submit the APOR by Monday, February 23, 2026. The APOR should be submitted only once per each provider identification, PID. If your APOR is submitted multiple times, only the first submission will be counted. If you have multiple businesses, multiple business models, one APOR is required for each PID. Emails will be sent separately to the contact on record per PID.

During the four-week process, TPM will send reminders each Monday. These will come via GovDelivery to ENs that have not completed the APOR. Exceptions to the Monday reminder will be the one holiday, which is in February.

Again, the APOR should be completed by close of business on Monday, February 23, 2026. It is imperative that your organization's APOR is completed in a timely manner. Failure to do so will constitute a violation of your TPA and can result in the Social Security Administration limiting your organization's ability to assign Tickets, receive payments, or end termination of your TPA. If you have any questions related to the APOR, please submit your questions to enapor@ssa.gov. Please note that it will be helpful to include your EN org name and PID number in the subject line. Next slide.

Thank you. So now that we have covered the APOR requirements, let's review the available resources. There are two resource documents to assist you in completing the 2026 APOR. To locate these resources, you can go to the Ticket to Work website at YourTicketToWork.ssa.gov. Once there, click on Resources at the top of the page. Then locate the resource document on the left-hand side of the screen. You should then have a similar view as seen in the screenshot. The two resources available for you are the APOR Questions and the APOR Frequently Asked Questions. Next slide.

With the resource documents in hand now, it's time to prepare for the survey. We ask that you preview both the APOR questions and the FAQs. The APOR questions located on the resource document page will be the same questions available within the actual survey received from SurveyMonkey. Based on those questions, you can prepare your responses in advance of completing the APOR survey. The survey via SurveyMonkey will not be shared prior to January 26, 2026, and should be completed no later than close of business on Monday, February 23, 2026. Next slide.

Again, on Monday, January 2026, the survey will be sent out and the survey will be sent to the Signatory Authority on file. If the Signatory Authority email address is the same for more than one PID, the survey will be sent to the Program Contact on file or an alternate email address that was provided by the Signatory Authority. If you have email firewalls, we suggest that you add SurveyMonkey as an acceptable recipient prior to Monday, January 26. If you have not received the survey by the end of the day on January 26, 2026, please check your spam inbox. And you can also send an email to the EN APOR inbox to request who actually would have received that survey.

Next slide, please. Okay, so now we're going to go through the APOR questions. The survey, similar to last year, contains 20 questions. These 20 questions fall under the categories of general, staffing, EN service-related. As stated earlier, it's helpful that you review the questions within the APOR question resource guide. Prepare your responses in advance of assessing or accessing the survey. Next slide.

There are seven questions that fall under the category of general. Topics covered under general include; business model, state vocational rehabilitation, rehabilitation agency vendor status, Partnership Plus agreements and employer engagement. Next slide.

Similar to 2025, there are only two staffing questions regarding staff suitability. Next slide.

And under the last category of EN service-related questions, there are 11 questions. These questions cover services offered by the EN, along with other topics such as Ticket assignment, employment outcomes, population served, self-employment, Timely Progress Reviews, often referred to as TPR, and alternate formats and languages. Next slide.

So we have covered the three categories and the 20 questions associated with the APOR. Prior to clicking Done, located at the bottom of the questions, at the bottom of Question 20 on the survey, please double check your answers. If you would like a copy of your responses, please ensure that you print each individual page to obtain a record.

You can click the previous button on the survey to print each page without losing your responses. Only click the Done button at the end of Question 20 when you're satisfied with your responses and also once the survey is printed. Upon clicking Done, you will receive a thank you message similar to what is on the screen for completing the survey. Next slide.

So now that we've finished the end of the APOR process, hopefully your EN organization is able to recognize your responsibilities regarding the APOR, you're able to locate the resources to prepare for the APOR, and you can accurately answer each question on the survey. I will now turn it back over to Derek for questions.

Derek Shields: Thank you so much, LaKesha, for going through the details. Now we have an opportunity to address the questions about the APOR process along with the APOR questions themselves and reinforce that this year, January 26, 2026, is when we begin. I'll take a sip of water there. That's a little tongue twister.

All right, as a reminder, we have different ways to ask questions. You can do it with MS Teams on the phone. Raise your hand through Star 5 and we'll call on you. Or through MS Teams, raise your hand. I have Katherine and Brittney working with me. And we'll start by going to Katherine with a raised hand. Katherine?

Katherine: Hi, Derek. Diane, do you have access to your audio? Do you want to ask your question?

Hi, Diane. If you have access to your audio, just unmute.

Diane: I'm sorry. I thought I had.

Katherine: No, you're fine. Thank you.

Diane: Thanks. Very quick question. On the APOR Addendum, Page 5, it lists contractor employee name and also company point of contact. So if I'm the company point of contact, would I also be the contractor employee whose name should go on that part of the form? I'd be filling it out. I'd be completing the form.

LaKesha Hunt: I believe this is a question for Terry. It sounds like you're referring to the 222 Form instead of the APOR.

Diane: You're right. I am referring to the 222 Form, but it's the — yeah, just the 222, not the Addendum, okay. So I know that that's the one that we keep on file, so.

Derek Shields: Let's see if we can bring Terry back in here.

Hi, Terry.

Terry Simpson: Hello.

Diane: Sorry about that.

Terry Simpson: That's okay. You were asking if you are the employee on the SSA-222 Form?

Diane: Yes. Am I both the contractor employee and the company point of contact if I am the company point of contact and I will be completing the forms?

Terry Simpson: What position do you hold in the company as the contact?

Diane: I'm the Ticket to Work manager. Does that answer your question? I am the point of contact for Ticket.

Terry Simpson: Are you the Signatory Authority? Are you the Suitability Contact?

Diane: Not Signatory Authority. That would be our CEO. But, yes, I am your Suitability Contact as well, I believe.

Terry Simpson: If you are the Suitability Contact, then you are the contract — the company contact. Or your Signatory Authority is also the company contact. But if it's your form, of course, you're putting on the first line your name as the employee, but the company point of contact would be the Signatory Authority or Suitability Contact.

Diane: Okay, so that would be me for both. Okay.

Terry Simpson: If you're one of those contacts.

Diane: I think I'm both of those, actually. So, okay, I think that answers my question. And thank you. I didn't mean to ask a question out of order, but I appreciate it.

Terry Simpson: No problem. If you need to confirm what your status is, please feel free to send an email about that.

Diane: Okay.

Katherine: Thank you, Diane.

Derek Shields: Thank you, Diane, for the question. And now we'll turn to Brittney. There's been some activity in chat. And Brittney I will ask you to kind of roll back and cover some of the questions that have been asked and not answered inside of chat so far for LaKesha.

Brittney: Okay. We have three questions that are related to the APOR section. They're all kind of related. They were asking if the survey link can go to the Program Contact instead of the Signatory Authority for the APOR.

LaKesha Hunt: So for that, we will initially send the survey to the Signatory Authority. The Signatory Authority can then forward the survey to the Program Contact. However, if the Signatory Authority is listed twice, the second EN PID will receive the survey to the Program Contact. Did I say that correctly? So I think dependent on the PID, I would say probably send an email to the EN APOR box with your EN PID and include your Signatory Authority on that email, and we can help ensure that the survey goes to the right person.

Brittney: Thank you. We have a question from Eddie. He wants to know the difference between the Suitability Contact and the Program Contact.

LaKesha Hunt: I think this looks like a 222 question.

Terry Simpson: The contacts are designated by your EN, whoever they are determined to be in those specific categories. They have different functions within Ticket to Work. The Program Contact has certain duties, and the Suitability Contact deals with submitting suitability documents, and they are who SSA has designated to sign these forms along with the Signatory Authority.

Brittney: Thank you, Terry.

Terry Simpson: If you need to specify who those contacts are within your company, please also send an email, and we'll look at your EN to determine who those people are.

Erinn: Sorry, I just want to add — this is Erinn. So just kind of based on the chat, I've been kind of seeing a good amount of questions asking about what the difference is between certain contacts or how we find out who holds certain positions. So if you've been an EN for a little bit, you've likely seen the emails about the regular employment verification process where we provide steps on how you can have your — somebody who is a Ticket Portal user go into the portal and view directory information about your EN, and that lists who in your organization holds each position.

I'll add those instructions into the chat, but that is just one way that you can kind of easily find out who is in each of those main point of contact positions within your EN. And if that information is no longer accurate, then you would want to submit a TPA change form to have that information updated. So I just wanted to add that in.

Derek Shield: Thank you, Erinn.

Terry Simpson: I'd like to also say if you are submitting a TPA change form, that goes to EN Service, to the EN Service email address, not to EN APOR or to the TTW222 mailbox.

Derek Shields: Thanks, Terry. There has been a question about where to — if they wanted to ask you about who is in which role, which email address do they use for that? The TTW222 email address or EN Service?

Terry Simpson: If it's in reference to the SSA-222 process, you can send it to the TTW222 mailbox. If you are changing, if you decide you want to change who those contacts are, once again, you submit the TPA change form to the EN Service mailbox. But as Erinn said, the best way to find out — the quickest way to find out is to use the process that she will be putting in the chat.

Derek Shields: Thank you very much, Erinn and Terry. And Terry is on standby for further 222 questions. Thank you for that. Let's go back to Brittney. Brittney, do we have any other questions on APOR for LaKesha?

Brittney: We do. We have one from Liz.

She said, what exactly will the email coming from SurveyMonkey be titled? Like what will be in the subject line?

LaKesha Hunt: It will state 2026 Annual Performance Outcome Report.

Brittney: And those are our only APOR-related questions at this time, Derek.

Derek Shields: Thanks, Brittney. As a reminder, you can raise your hand on Teams or use your phone. Two-step process. Use Star 5 to begin that to ask your questions. I'm going to read out what Erinn has posted here in chat to ensure full access to everyone. To determine the individuals that are the main points of contact for your EN, the EN should identify and share the following steps with the current portal user.

One, log into the Ticket portal and navigate to the About Your EN and SVR section on the main screen. Two, click the View Directory Information About Your EN or SVR link. And three, review the listed names for your main POC to ensure that everything is accurate. And as Terry said, if it is not accurate and you'd like to make a change, then please email enservice@ssa.gov. It looks like Katherine has her hand raised.

Katherine: Hi, Derek. We have James who had his hand raised earlier. James, do you have access to audio if you'd like to ask your question?

James: Hello, and thank you for taking my question. I have a couple. I have a question about Questions 11, 12, and 13 on the APOR. When they ask how many Ticketholders assigned to our EN meet various criteria or certain situations, are we including Ticketholders that are currently assigned to us or were assigned during the reporting period? Because we've had a few that we've had to unassign for either not maintaining two-way contact or various other reasons. So do we count them when answering those questions?

LaKesha Hunt: The answer is yes. You would count the Ticketholders that were serviced between January 1, 2025 to December 31, 2025.

James: Okay, thank you so much.

LaKesha Hunt: So you'll cover the previous calendar year.

James: Thank you.

LaKesha Hunt: Thank you, James.

Derek Shields: Thank you, James. Any other questions, Katherine, from raised hands?

Katherine: Not at this time, Derek.

Derek Shields: Let's go back to Brittney. Brittney, it seems like the chat activity is starting to slow down. Any other questions?

Brittney: No other questions at this time.

Derek Shields: Thank you. I'm sure LaKesha is okay with that. I want to pull Erinn back in. Erinn, there was a lot of activity. Any other summary comments that you'd like to make? I want to make sure you have an opportunity to have any other remarks before we get back into the chat here.

Erinn: Yeah, so just a reminder, again, you do have the ability to access the information about who are your main point of contacts. The APOR survey will go to your Signatory Authority unless you are in a situation where you have multiple ENs, multiple PIDs. So for instance, you have a traditional EN and you have an Employer EN. In that circumstance, one of the surveys will go to the Program Contact.

If there is a particular reason that your APOR survey should not go to your Signatory Authority, then you would need to reach out to that enapor@ssa.gov and make sure to include your EN name and your PID in the subject line of your email and explain that it can't go to the Signatory Authority and who it should go to.

Derek Shields: Thank you, Erinn. Appreciate that. We have a couple of questions that came in. Can this broadcast be viewed later? We'll post the recording and slides at the Your Ticket to Work website under the training and events section. That's where the EN Essentials materials go. So there will be some ability to access these materials afterwards to reinforce what was covered today.

Another question in the chat, can my EN begin signing the SSA-222 Addendum now? And it goes on… I'd like to start. And LaKesha responded, unfortunately, no. Signatures/dates should not be prior to the January 26, 2026 start date.

Derek Shields: So while you might be eager to begin, we do encourage you to start that on Monday and then complete it before the final date, I believe, is February 23, 2026. A question came in here. Is there any way to clean up the EN directory if it dates back over 20 years? I'd encourage you to connect with EN service through email and we'd be able to address that request.

Erinn: Yeah, just to add on to that. I believe that question might be in reference to the fact that — I believe, when you click view EN directory, you can see some historic information about points of contact. It's my understanding that we don't have control over the fact that that information exists, but I have heard that before. So we do have that note that if we can, at one point, change it so that you don't see that information, we understand that it has been requested.

Derek Shields: Thank you, Erinn. We have questions here. Already have signatures done, start over. Assuming that we're talking about signatures for the processes we've just talked about, yes, it must be done starting on Monday.

The next question came in, maybe LaKesha could address this. We're expected to have bad weather Monday. Of course, there's bad weather coming across the country. It may impact the beginning of this timeframe window that we've talked about. How long do we have to complete — the chat just got pushed — Survey and Addendum . LaKesha has said the survey will start on Monday, January 26, and end on February 23. So assuming this bad weather doesn't last for nearly a month, there is a long timeframe of flexibility to make sure that everybody is safe. Anything you'd like to add, LaKesha?

LaKesha Hunt: No, that's correct. I see you have approximately 30 days from Monday to complete the survey. However, we encourage you to not wait 30 days.

Derek Shields: Here's another question. What do we do when we are in the middle of staff changes? Imagine this is more reflective of the 222 process.

So let's get an answer to that and then, Danielle, we'll call on you. Terry is coming back online. What do we do in the middle of staff changes? Still have not gotten suitability and are currently waiting. Go ahead, sorry.

Terry Simpson: Anybody who is employed with your EN involved in the Ticket to Work Program, regardless of what their suitability status is, if they're employed in the Ticket to Work Program, they do need to be added to the Addendum and they should have a 222 form on file at your EN location.

If you currently have employees that you know are going to be gone in February or March or April, if they're there when you complete this process, you add them to the Addendum. And then whenever they leave, you send a TPA change form to EN service and let them know that they need to be removed from the contract. But anyone who is currently employed during this process must be on the Addendum regardless of their status.

Derek Shields: Thank you so much, Terry. And, Danielle, thanks for your patience. I wasn't able to see the hand raised. Let's go back to Katherine and activate Danielle to ask her question, please.

Katherine: Hi, Danielle. You're active, you can ask your question.

Danielle: Hi. I am new staff, new to Ticket to Work as well, and I wanted to know for the APOR, the yearly report is for last year, I'm assuming, right? Like you're looking back at last year?

LaKesha Hunt: That is correct. You're looking back at your full 2025.

Danielle: Okay, so full 2025. In that case, that's what I figured. I just wanted to make sure if we didn't have anybody in this role that was vacant for two years, how does that work? In as far as there were no Ticketholders active or anything like that.

LaKesha Hunt: You would add — I think you're probably referring to the specific questions around the Ticketholders and if you did not have any Ticketholders in 2025, you would answer — I think you have the option to answer N/A for those.

Danielle: Okay, so you think — just go through it and select N/A for things that don't apply?

LaKesha Hunt: Yes.

Danielle: Okay. Thank you.

Katherine: Thank you.

Derek Shields: Katherine, do we have any other raised hands?

Katherine: I see no one else, Derek.

Derek Shields: Thank you, Katherine. Brittney, any other new questions in chat to address for either LaKesha or Terry?

Brittney: Not at this time.

Derek Shields: Well, that being the case, I appreciate the opportunity for the presentations today from Ellie, and Terry, and LaKesha and of course for your participation. But we have provided some email addresses and some guidance and more guidance will be coming out of course for each of these procedures per the presentations that were provided. Let's now move forward to the next slide, please.

We do have some online resources as Ana posted in chat. Those materials from today will be available on the Your Ticket to Work website. Under the EN Essentials Learning Events, go to YourTicketToWork.ssa.gov. Go under the Training and Events tab. You can go down the side and find presentations under the Essentials Learning Events. Glynis has also posted a link to that section directly in chat. If you haven't accessed that before, you can visit that and check that out. We will be working to get this material there as quickly as possible. Let's go to the next slide, please.

As always, we'd like to offer this opportunity to advertise a few upcoming events. On January 28, we have our next WISE webinar that's a week from today. This afternoon we will have a

WISE webinar and we invite you and your Ticketholders to join us for that content, looking at repositioning for a new career through the Ticket to Work Program. On February 3, we will have our next All EN payments call. Of course, we welcome you to join that session for the presentations and updates there.

And then we have February 25 designated for our second WISE webinar of the year. All of these activities are posted on the Your Ticket to Work website. If you'd like to review the calendar, go to the training and events section and right at the top you can access that link or access it through chat of the calendar of events link.

Of course, we appreciate your feedback and ideas. Going into 2026, this is our first EN Essentials event, but if you have feedback on this content or ideas, we encourage you to reach out to EN Development and Training at ENOperations@ssa.gov. Feedback, recommendations, and ideas will be sorted and provided for future EN Essentials events and training.

A question in the chat, why does the calendar only go through June of 2026? That's the extension period of the training calendar because that's how far we've been able to identify those events for the year. So further events will be added once they have been scheduled and approved.

There is a question here. I'd encourage you to follow up with the Payments department and attend the — I don't have the specific payments at a glance information but we'll be following up and somebody might be able to respond to that in chat prior to the end. I don't have that readily handy.

And with that, as the questions continue to come in, we are going to turn to wrap up this event for the EN Essentials. We thank you all. Once again, we thank Ellie, Terry, and LaKesha and our colleagues Erinn and Mel at the Social Security Administration for the presentations today. We appreciate your attention to this detail to maintain compliance with the 222 and APOR processes because this will allow you to continue doing the important work of supporting Ticketholders on their pathway to financial independence. This ends today's webinar.