

# EN Essentials

Transcript: Ready, Set, Go! Time to complete your annual form SSA-222 and Annual Performance Outcome Report

January 23, 2024

**Derek Shields:** Welcome to today's EN Essentials training. Today's topic is Ready, Set, Go. Time to complete your annual form SSA-222 and Annual Performance Outcome Report, or APOR. My name is Derek Shields, I'm serving as today's moderator. If this is your first EN Essentials session, welcome. Please know we designed the content for individuals seeking to enhance their Employment Network 's performance and compliance with Ticket program policies. The learning events build upon the initial EN Foundations Training Modules, and future new resources, best practice strategies, and other helpful information for your success. Before we begin with today's agenda and presentation, I'd like to review a few logistics and housekeeping items. First, it's important to know that this meeting is being recorded and a transcription is also being captured. Now, to the next slide, please.

For the EN Essentials session today, we have our agenda, we're going to cover some logistics as I mentioned, I'm going to introduce our presenters and we'll touch on our learning objectives, and then we'll move into the core content. We have two sections for you today; the first section entitled "Security Awareness Form, SSA-222 and the Addendum Process," that will be followed by a media Q and A session focused on that content. After the Security Awareness content, we will transition into the Annual Performance Outcome Report process, followed by a second Q and A session focused on the APOR itself. So that's today's agenda and with that, let's move to the next slide, please.

As I mentioned, we have some logistics to cover; first off, we encourage your participation and we look forward to you asking questions. You can do that in a number of ways; please use the MS Teams chat if you're interested in doing so, we do ask you to limit your questions to one per participant. You can also use the following email addresses to send in your additional questions or your comments.

We have three of them for you today; we have the Security Awareness Form or Addendum email address of [TTW222@ssa.gov](mailto:TTW222@ssa.gov), we have the APOR address; [SSAENAPOR2@yourTickettowork.ssa.gov](mailto:SSAENAPOR2@yourTickettowork.ssa.gov), or the third option for our EN Essentials related topics, please email us at [ENOperations@yourTickettowork.ssa.gov](mailto:ENOperations@yourTickettowork.ssa.gov). Those addresses are all in the chat and we will provide them later during our Q and A too.

Now it's important to know that you can access closed captioning too, it's available for participants who join using the MS Teams application or by using the closed caption link that was provided in the GovDelivery email announcement and shared in the chat for today's meeting.

To turn on closed captioning in MS Teams, go to the three ellipses at the top of the MS Teams window, click more, you can scroll down that menu list to select Language and Speech, then click on Turn On Live Captions. Alternatively, you can use the link option, you paste that link into your own browser and will open a separate browser to view those closed captions. Again, please use MS Teams chat section for questions, if you do want to ask a question later, we have a two-step process to do that via telephone, we'll tell you how to do that as well. Or, you can use the raised hand feature to ask your question live through video as well. Okay, next slide, please.

Alright, as I said, my name's Derek Shields, and I'll serve as the moderator, I'm part of the Ticket to Work Program Manager Team, and I'm pleased to be joined today by two of my colleagues.

Today we have Terry Simpson with us. Terry serves as the EN Service Onsite Support Manager and we have Ana Morales, Ana serves as the EN Development and Training Manager. Terry will be covering the first portion of our content focused on the security awareness form and addendum process, and then we'll have Ana come in for the APOR content. Next slide, please.

Before I turn this over to Terry, I want to just cover our full learning objectives for today. We have four; first we're going to cover how Employment Network responsibilities regarding the social, excuse me, the Security Awareness Certification and Annual Performance Outcome Report. So we're going to make sure that you understand your EN responsibilities, perhaps this is new for you, or if you've done it before, it'll be great refresher. Next, how to complete and submit the Security Awareness Form SSA-222, or the Addendum. Our third objective, how to accurately and completely answer each question on the APOR, and fourth; how to submit the APOR questionnaire using

SurveyMonkey. Very specific learning objectives to help this January as we open up both of these requirements to you. Alright, next slide, please.

We have now hit that first section, Security Awareness Form, SSA-222, and Addendum. It is now my privilege to turn this session over and turn to the next slide for Terry Simpson to dive into the content. Terry, over to you, please.

**Terry Simpson:** Thank you, Derek. Good afternoon, everyone, I'm here to share information with you regarding the security awareness process. Per the Ticket Program Agreement, all EN employees, as well as contractors and subcontractors, and/or affiliate partner personnel who will have access to Social Security information must complete a periodic training in security and privacy awareness. The training involves reading, understanding, and signing the Security Awareness Form, also known as the SSA-222 form. Once you have submitted and signed your document, your training is complete. For 2024, all ENs must submit the Security Awareness Form or the Addendum, whichever applies to your EN, to [TTW222@ssa.gov](mailto:TTW222@ssa.gov). This is a new email box. You will be using that box to submit the forms starting no earlier than January 29, 2024, and due no later than February 26, 2024. Any form submitted prior to January 29 will need to be updated and resubmitted to complete the training requirement. When submitting your form through your email, please include Security Awareness Form and your PID in the subject line of your emails. Next slide, please.

To locate the training form, go to your [TickettoWork.ssa.gov](https://TickettoWork.ssa.gov), 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 Maintenance heading. And for your convenience, a screenshot has been added to this PowerPoint presentation. For this slide as well as additional slides in the future. Next slide, please.

All EN staff must review, complete, and sign the SSA-222 Form, regardless of their stability or Portal access status, or when they last submitted the 222 Form. Any submissions prior to Monday, January 29, are not considered to be part of this training requirement. Page 5 of the SSA-222 Form, which is shown in this presentation, must have all sections completed and a copy must be kept on file at your location. So this means if you happen to send a form today, tomorrow, or any other day prior to Monday, you will still need to complete this process after Monday, January 29. Next slide, please.

Who must complete the SSA-222 Addendum? ENs with one or more staff must complete and submit the Addendum. The individually signed SSA-222 forms must be kept on file at your EN location. ENs with a Signatory Authority only, that means there's only one person at your EN, are not required to complete the Addendum. A signed copy

of the SSA-222 form should be submitted. Submitting the SSA-222 form only applies to ENs where one person is the Signatory Authority and provides all Ticket to Work program services. Note, all staff, regardless of their suitability or Portal access status, must complete this training. This includes anyone on your staff that you have not yet submitted documents for and those who are still pending, for suitability clearance or Portal training. So everyone must submit either the SSA-222 form or the Addendum, depending on the status of your EN. Next slide, please.

Once again, we do have examples on each slide presentation. The Signatory Authority or suitability contact must complete and sign the Addendum. That means that no other contacts will be able to complete and sign this Addendum, it must be the Signatory Authority or the suitability contact. List all EN staff who have completed the SSA-222 form, including the individual filling out the Addendum that refers back to the suitability contact or the signatory authority. This means the person who signs the form must also be listed on the top of the form. So if you are filling out this form, your name must also be listed on the top of the form. The last column, which is the date on the Addendum, should match the signature date on the SSA-222 forms that each employee completed. This applies to the SSA-222 forms on file at your EN location. Once again, there should not be any dates listed on this form prior to January 29, because this process starts on Monday, January 29. Next slide, please.

We often receive many questions for clarification when we go through this process for the Addendum, so I'm just going to go through the columns on the Addendum. In the second column, which is the Ticket Program start date, the start date does not necessarily refer to the date the employee started with your organization. It refers to the date the employee begins working on the Ticket to Work Program. In the third column, which is job title, that does not refer to the EN contact, i.e. Program contact, Signatory Authority, Payments contact, Ticketholder contact, or the Directory Web contact. It refers to the organizational job title. For example, employee specialist, counselor, or CEO. In the fourth column, the date must correspond to the date each employee signed their individual 222 form. That's the form that will be left on file at your EN location that each employee must sign. As a reminder, ENs with multiple staff should only submit the Addendum, the SSA-222 forms should not be submitted with the Addendums. Those forms are kept on file at your EN location. Next slide, please.

Signing the SSA-222 form. EN staff may sign the SSA-222 form or the Addendum electronically or with a wet signature. For your convenience, the signature instructions link has been provided to this PowerPoint and to the chat to guide you to its location on the website. Please, when you submit your forms, do not encrypt your forms, we will not be able to process your Addendums, or your Security Awareness forms if they are



encrypted. Please do not encrypt them. As a reminder, the submission period starts this Monday, January 29. All forms are due by February 26. All EN staff must review, sign, and keep a copy of the SSA-222 file at the EN location. And as I stated previously, once you review the form, sign it, and send it to us, that is the completion of your training. ENs must submit the form, SSA-222, or the Addendum to our new mailbox which is [TTW222@ssa.gov](mailto:TTW222@ssa.gov). When submitting your SSA-222 form, only page 5 of 5, which is the signature page, is required to be submitted. Send related questions also to the new email box. Include your EN PID in the subject line of all emails and send it to our new employment box for the Addendums, which is [TTW222@ssa.gov](mailto:TTW222@ssa.gov). This email box should only be used for questions or submissions of the Security Awareness Training process.

Do not send any other emails that you would normally send to the EN service box to this box. This box is only for this process. Failure to complete the Security Awareness certification by February 26 is a violation of your TPA. SSA could limit your ability to assign and receive payments or terminate your TPA. This concludes the training of the SSA-222 requirements. I will now hand it back over to Derek. Thank you Derek.

**Derek Shields:** Thank you, Terry, for taking us through the SSA form 222 requirements along with the Addendum process. The training content was really helpful, and it spurred some questions in the chat. What we'd like to do now is open up our first Q and A period and to do that, if we could move to the next slide, I just want to provide some reminders about how to ask questions.

As I mentioned earlier, you can always ask your question in MS Teams, we've had some Q and A there, and we'll revisit some of those that haven't been answered.

If joining via phone, you could ask your question via telephone; press star five to raise your hand and we will then unmute your telephone, we'll call upon you, and then you'll need to press star six to speak. So telephones is a two-step process, star five to raise your hand, we'll unmute your phone, call on you, and then press star six to speak. If you are on the MS Teams platform and prefer to ask your question out loud, you can raise your hand and we will unmute your mic and you can turn on, you'll have your audio on and if you choose, you can put your camera on too. We do remind you to limit your questions to one per participant, and if you have other questions, we have these email addresses for going to more depth, excuse me, Security Awareness, SSA-222 form, or the Addendum, that email is [TTW222@ssa.gov](mailto:TTW222@ssa.gov). For APOR, send email to [ssaenapor@yourTickettowork.ssa.gov](mailto:ssaenapor@yourTickettowork.ssa.gov). And for EN Essentials related session questions, email us at [ENOperations@yourTickettowork.ssa.gov](mailto:ENOperations@yourTickettowork.ssa.gov). We'll leave those instructions up during the Q and A session, and right now let's go over to Katherine.

Katherine, I believe we have a raised hand.



**Katherine Jett:** Hi Derek, yes, we have Michelle. Michelle, you are unmuted, please click the microphone above and unmute yourself and ask your question.

**Michelle:** Hi there. I hope everybody can hear me. I have a question, I had submitted to the EN service email about a week ago, there are a couple of us in our EN that have received the Portal notification that if we don't complete the training before a certain date, which is the 30th I believe, we will be locked out of the Portal, so I had already sent the 222 Form out to all of our folks to get them completed, because we were kind of, I didn't get a response from EN service, about how to mitigate this issue, so I've already sent them out to all of our folks to get them signed, so they'll all be signed, hopefully, before the 29th. Does that mean that we need to send it out again and have it signed after the 29th and submit twice?

**Terry Simpson:** Thank you for your question. Yes, it does, unfortunately. The process that you sent your forms for was for the Portal to make sure that all of those signatures were in line for accessing the Portal, but this is the annual requirement, and anything signed prior to January 29 is not part of this process. So, everyone will need to sign the forms again and submit them between January 29 and February 26. I hope that answers your question.

**Michelle:** Thank you.

**Terry Simpson:** You're welcome.

**Katherine Jett:** Thank you, Michelle. We now have Anthony; Anthony, you are unmuted. Please click the microphone above to unmute and ask the question.

**Anthony:** Hello?

**Katherine Jett:** I can hear you.

**Anthony:** Okay, good afternoon. I'm with Team Management 2000 in Hackensack, New Jersey. Given the new email address that we're submitting it to, the previous email, was there an issue? And there's another question, if I submit on the 29th, what's the turnaround time to let me know that it's done accurately? [inaudible]

**Terry Simpson:** Good afternoon, everyone will receive a notification that their form was received. At that point there will be a processing where we have to do some checks and balances on our end, and you will receive a notification letting you know that the review

was complete at a later date, depending on how long it will take for us to actually compare what you've sent in with what's on our system. But you will receive an immediate notification letting you know within 24 hours, that your document was received. It's not necessarily complete at that point, but we will let you know that it has been received.

**Anthony:** I'll just follow what I did last year after I got it correct, thank you. Sending it to the correct new box though.

**Katherine Jett:** Thank you, Anthony. Derek, we have no more raised hands.

**Derek Shields:** Thank you, Katherine, and thank you Terry. Again, if you have questions you'd prefer to ask live, like these past two questioners, please raise your hand, we'll call on you or use the telephone two-step process. Let's now check chat, there's been some activity in chat with some questions and answers about different topic areas. Britney on our team is with us checking chat. Britney, anything in particular that you'd like to call out?

**Britney Boyd:** Hello, Derek. I do have one question I see may not have been answered yet. By Sarah, if we don't remember the start date for the Ticket holder, for the employee, what date should they use?

**Derek Shields:** Thanks Britney. Terry, we ask you to come on for that one. If they don't remember a start date for their employee, what date should be used for the start date?

**Terry Simpson:** I will refer to SSA for that.

**Derek Shields:** Thanks for that, if we can get a colleague from Social Security come on, I see Erinn has turned her camera on. Erinn, for you, please.

**Erinn Weidman:** Yes, so the Ticket start date should be the date that the individual started working for your EN. If you for some reason don't have that date, you could, if they have suitability, which they looks like they should, then you could use their suitability date. I hope that helps. Their clearance date from on their letter.

**Derek Shields:** Thanks, Erinn. So two possibilities there. One, it's important to try to find the original start date for the employee, so maybe an HR record file or asking somebody for assistance with that, and second, if not, then we have an original suitability clearance date then to use that and maybe make a note that that's what it is.



Appreciate the guidance there. Britney, come back to you, any other chat questions?

**Britney Boyd:** We do, we have another question from Natalie. For clarification, we should submit page 5 of the form SSA-222 along with the form SSA-222 Addendum. Meaning three staff should submit four documents, three page fives and an Addendum.

**Terry Simpson:** The SSA-222 form should only be submitted for ENs that only have a Signatory Authority and they are the only person who is providing Ticket to Work services. Those forms are kept on file at the EN location, if those individual ENs submit the forms, they only need to submit page 5. For all other ENs, who have multiple people on their staff, they are submitting the Addendum. The Addendum is the only thing that should come to us if you have multiple staff, and you keep the SSA-222 forms on file at your EN location. I hope that helps. If not, I'm certainly here to clarify further.

**Derek Shields:** Yeah, thanks for that, Terry. Yeah, I think when you shared with me that the forms on file are acknowledging that the training existed, and the Addendum is the submission of that, so remembering that this is about the training, but the signature of the Addendum identifies that that happened, it's important to recognize this.

**Terry Simpson:** Yeah, the Addendum is simply you attesting that you have the individual forms on file with the date that's listed on the Addendum.

**Derek Shields:** Thank you, Terry. So Britney, you got another good one there, I'm going to come back to you. Any other questions that you'd like to call out?

**Britney Boyd:** Yes, I have a question from an unknown user, SSA-222s are required for staff who have completed the e-Qip, even if they haven't been cleared yet, correct?

**Terry Simpson:** That is correct. Everyone must submit, must sign the SSA-222 form. And their name must be listed on the Addendum, regardless of what status they are within the process of becoming a full-service member of your team. Everyone, regardless of whether you've already submitted their e-Qip, whether you're waiting for their e-Qip to go through, whether they haven't begun training yet for the Portal, whether they're pending in the Portal, absolutely everyone involved in the Ticket to Work Program for your EN, must submit their 222 form, or rather they should sign a 222 form and your Addendum should state that they've signed it and it's on file in your office. And again, the date on the Addendum must match the date that's on their 222 form. And all dates have to be January 29 or later.

**Derek Shields:** Terry, when you say or later, January 29 through, is it February 26?



**Terry Simpson:** February 26. Thank you for correcting me. Not later. January 29 through February 26. That is the timeline.

**Derek Shields:** And it can include January 29 and February 26, right?

**Terry Simpson:** Exactly. Nothing else out of those parameters though.

**Derek Shields:** Thanks for that. I've noticed in chat there's been a couple questions about well, I can go to a certain link to get the instructions but where is the form itself or the Addendum? And I've seen both posted, so if you go back in chat, Ana posted the forms link, and I know that Britney posted the instructions link. So hopefully everyone's able to find those. Terry, a follow-up here; will further email be coming out with instructions on this?

**Terry Simpson:** I will defer to SSA regarding additional emails that will be coming out, but on this presentation, the information about where you can find both forms is on page nine of the presentation. And of course as you said, the links are available in the chat and in the presentation.

**Derek Shields:** Thank you, and we have the presentation posted in our EN Essentials location, which we'll share in a little bit. You can use the links that Ana and Britney have posted in chat, and maybe I can get Erin to come back on for a second because I brought up this point. I want to make sure we're clear on it. For email instructions, Erinn, do you have anything to correct that's been said? I just want to make sure that we don't mislead anybody there.

**Erinn Weidman:** Sorry, could you clarify what you were asking about email instructions?

**Derek Shields:** Yeah, how many different ways that ENs will receive the information for the 222 form requirements, and obviously next will be the APOR. We've posted the links to the instructions in chat, we posted the links to the form in chat, will ENs be receiving further guidance through email as well?

**Erinn Weidman:** Yes. They will receive an email as well on the 29th, and throughout the process stating that the collection period has begun, and it will include instructions on how to complete this process.

**Derek Shields:** Perfect. Wanted to make sure that we got that accurate and complete, you have done so. Appreciate that. Katherine, it looks like we have another raised hand.

**Katherine Jett:** Hi Derek, yes, we have Sonya. Sonya, your mic is active, go ahead and unmute up top by clicking your microphone.

**Sonya:** Good morning, you guys. Happy new year. My question is, it might be simple, but if the person, if the employee is still going through suitability, what date would I put on it when they haven't received clearance yet?

**Derek Shields:** Thanks for the question, Sonya. Appreciate it. Bring back up Terry, to make sure we have clarity there. Terry?

**Terry Simpson:** Thank you, Sonya. If it was someone that you just hired, then you use the date that they were hired. The date of the suitability letter, that was only mentioned because someone stated they may not remember what the date the person was hired. But if you know when that person began, certainly use that date. That is the preferred date.

**Sonya:** Right, that's what I thought, but I was like let me ask first. Thank you.

**Katherine Jett:** Thank you for your question. And we have one more. We have Anthony. You are unmuted. Hi Anthony, you're unmuted, you can unmute up top and ask your question.

**Anthony:** I'm sorry. I just went back to the Security Awareness spreadsheet from last year, and on that spreadsheet, it had a list of our employees and included in that was a person that we had no record of. How would that come to be? On your end?

**Derek Shields:** Thanks for the question, Anthony. Terry, would you like to respond?

**Terry Simpson:** Well, without knowing the particular situation involved in that, I would not be able to really answer that question. I hope that that has been resolved, if not, please contact us at the email in question if you locate someone on any forms that is not a part of your organization. But as I said before, that is part of the checks and balances that goes on behind the scenes once you send your form. We make sure that there's no one listed on our system who is not on your form or vice versa. So it does take a while before the actual completion process happens. You'll initially receive a notification letting you know the form was received, but after at, that's where we're going

to go through all of the forms and combine it with anything on our system, and determine if there are any discrepancies, and we will contact you if there are.

**Anthony:** Okay, you know what, you kind of remind me of when they ask you those questions about, online usually on a computer. Have you ever lived at this address or that address, or owned this type of car, never mind. Thank you.

**Terry Simpson:** You're welcome.

**Derek Shields:** Thank you, Anthony. I think what we hear there is if you see something that doesn't look right, please reach out to EN Service through email, to follow-up and it, and hopefully that could be rectified if somebody wasn't an actual employee. We do have time for one more question, I think we have another raised hand. Katherine, do you want to try to call on that person, please.

**Katherine Jett:** Absolutely Derek, we have Michelle, you are unmuted. You can unmute and ask the question.

**Michelle:** Hi, thanks for taking my question. I just want to clarify because during the presentation, Terry said that the date in the position is not the hire date. So, from my understanding, if you have folks that are not yet finished with suitability, they cannot work on the Ticket to Work Program. So, if we put a date before they receive suitability, is that going to raise some red flags somewhere?

**Derek Shields:** Thanks for your question, Michelle. Terry, if you could come back on camera for this one, that would be helpful or if we need to call on someone from Social Security, we could do so.

**Melanie Webb:** Hi Derek, this is Melanie with Social Security, I did want to clarify one point on that so there are queue dates that we're referencing and so the date that the original person asked about was how do we do that for the person hadn't cleared suitability yet, and in that case, we were saying, if there's a hire date, you can include that, that would be for the employment date. The other date that we need, and this is for everyone people who haven't cleared suitability yet, is the date that the 222 was signed and so for that date, it's important that you know, even if they haven't cleared suitability yet, we would need to make sure that it falls between the January 29 and February 26, date, since that's when the window opens. So I just wanted to clarify one date is for the hire date, if you don't know that date, when you can use the data that they were cleared for suitability, but the second date is the date that the 222 was signed. Does that help?

**Michelle:** So my question is it says on the form, Ticket to Work Program start date. And we have lots of folks that have been here for 10, 20 years, and don't start with the Ticket to Work Program until it's relevant to their position. So, if I don't have the date that they started with the Ticket to Work Program, and I put in their start date of like 2008, isn't that going to raise a red flag if they didn't get suitability yet? Yeah, and for that situation, I mean if they've been there for you know, 10-15 years, and they are just now applying for suitability.

**Melanie Webb:** Erinn, do you want to jump in on this one, if we have a situation where there's a long lapse?

**Erinn Weidman:** So, I just want to clarify, the situation you're speaking of is if you have someone who was hired at your organization but not work for your EN, not working on Ticket to Work, and then transition into Ticket to Work, you're asking what you would put as the Ticket start date, in that situation? Is that the question?

**Michelle:** Right, because the form asks for the Ticket to Work program start date. But let's say this person was in HR prior and they just now applied to work in the Employment Network , and they--

**Erinn Weidman:** Yeah, so you would put — sorry, go on.

**Michelle:** No, no, no, you go ahead.

**Erinn Weidman:** In that circumstance, if they were previously not working as part of your Employment Network , not working as Ticket, and then transition, you would put the date that they transitioned and began working in your Employment Network , or began working on Ticket. And if you don't know that date, then you, and they've received suitability, you can use their, the date on their suitability letter.

**Michelle:** And they have not yet completed suitability. So do I leave it blank?

**Erinn Weidman:** I would, I mean you can email EN Service about this specific situation, I would probably suggest getting as close as you could, to the correct date that they started working on Ticket. They can't work on Ticket until they have suitability. That you decided to transition them to begin working on Ticket is what I meant.

**Michelle:** In our organization, no one is placed in the Employment Network as an employee until suitability is granted. So even if we hire somebody, they can do all their training and everything outside of the Ticket to Work Program, but they do not work for our EN until they have suitability.

**Erinn Weidman:** Yeah, so you can put the date you made the offer for them to begin working on Ticket.

**Michelle:** Okay, thank you.

**Erinn Weidman:** With understanding that you made that offer but they need to be able to receive suitability, yes.

**Michelle:** Thank you.

**Erinn Weidman:** I think it's important to say again that the Security Awareness Form has absolutely nothing to do with the suitability process. This form is stating that they understand security and awareness process. They're understanding, they are testing that they understand PII and anything else involved in this Addendum. It has nothing to do with suitability.

**Derek Shields:** Thank you, Erinn, and thank you Terry, for those explanations, and Michelle, thanks for seeing through until you got your answer using the date of offer for the position before they started and before they have suitability is the acceptable guidance there and it seems to work for that. We do have two more hands that are raised, I'm going to take one more question and then we're going to move into our next section. We will have a second question set, so after this question, if you have something, you could bring it back in that question set. Let's go over to Katherine.

**Katherine Jett:** Hi Derek, we have Diane, you are unmuted. Please ask your question. You may need to click the microphone up top to unmute yourself.

**Diane:** Right, okay, you can hear me now. Okay, so this is along the same lines, but like we have a supported employment program that doesn't really have anything to do with our Ticket Program, but those employees, because they work for me, still need to do the 222 Form?

**Derek Shields:** Thanks for the question, Diane. Terry, we have somebody that's inside, and organization that runs as supportive employment program, it's my understanding Diane's asking a question that they're not part of the Employment Network, but they're

inside of the organization, do they have to complete the Security Awareness Form training to be listed in the Addendum?

**Terry Simpson:** Not quite sure I am understanding the question. If they're, are they affiliated with the Ticket to Work Program? Within the supported employment program?

**Diane:** No, I mean it's just a small office, and we all work together, but they work on the ones that we have contracts for IBRS or Medicaid, not the Ticket to Work Program. But you still want the form filled out.

**Terry Simpson:** If they're part of the — if they are in any way associated with the Ticket to Work Program, they need to have forms submitted. But sounds like you're saying they are not, they're just in the same location.

**Diane:** They're just in the same location working with people with disabilities through their, our supported employment program.

**Terry Simpson:** Okay, only people who are affiliated with the Ticket to Work Program.

**Derek Shields:** Erinn? I saw you —

**Erinn Weidman:** Yeah, so I am seeing this question come up in the chat as well. So I do want to clarify. If you're an organization that has multiple programs, one of them being Employment Network , the only people that need to sign SSA-222 or that need to be listed on the Addendum, are the employees of your Employment Network or those that have access to any kind of Ticket information. If they have nothing to do with your EN and they just happen to be employed at the same organization, because you have multiple programs, you would not list them.

**Diane:** Okay. Thanks.

**Derek Shields:** Thanks for the question, Diane, and thanks Erinn for coming on with that answer. A lot of great questions, appreciate the exchange. And what we do need to do now is move to the next section as we identified for Ready, Set, Go! We have two important processes underway, and the next one is Annual Performance Outcome Report, or APOR process, and for this, if we can move forward to the next slide, I'm pleased to introduce Ana Morales who will deliver the content. Ana, over to you, please.

**Ana Morales:** Thank you, Derek, and good afternoon, everybody. So, I'm going to move now to the APOR section and before I start, I want to say that the SSA form 222 applies to everybody regardless of suitability status, as you just heard with the presentation and all the questions that we had. So everybody at the Employment Network has to complete the form. However, the APOR section, which I'm going to move now, does not apply to every EN. Well, does not apply for some time I'm going to say. So, if you are between, if your contract or award date for your Employment Network has a 2023 date or even 2024, this APOR portion that I'm about to complete does not really apply to you because you are not yet required to complete it. You are more than welcome to stay and learn the process for next year, but if you need to leave you can go ahead and do that. And also know that all this information is going to be recorded and posted to our website so whenever you have the time to review this information, you can do it.

Alright, so, we have heard the magic dates of January 29 through February 26, and those are the APOR and 222 dates that we're going to be operating all the process for both projects for this year. So what is the Annual Performance Outcome Report, or the APOR as we call it? So, the APOR is this report that is required per your agreement for each Employment Network to complete, and is done annually, we have a time frame where it's like open enrollment, right, for your insurance, it's kind of the same thing. We have our open enrollment for these processes as well. So, it is required per the TPA, and you have to submit it. And it's looking for outcomes achieved by your Employment Network with respect of services that you offer to your Ticket holders. Next slide, please.

So like I said, the TPA is the one where you can read more specific information about the APOR, specifically under Part 3, Section 9B, that it states that it is done manually, the information that is requested, and more information about that. The following groups are not required to complete the APOR and those are the State Vocational Rehabilitation Agencies, simply because they don't have an award agreement with Social Security, they just joined the program back in 1999 when the program started, and they are just partners with SSA on this effort. And also the ENs with agreement dates in the calendar year 2023 and 2024. I also want to mention that by now, you should have already received information about the APOR and if you haven't, well, you're going to start to receive these weekly Gov Delivery emails.

Those are the emails where Social Security provides all the information about APOR and 222. You will be receiving that every week. As you submit your information, you're going to be removed from the distribution list, and you're not going to receive those emails anymore. But we are going to ensure that everybody receives these reminders between January 29 and February 26. Next slide, please.



Then, APOR requirements. So the timeframe for completion we have hammered on those dates for a couple of occasions now. But it's already in the slide for you to have it in front of you. The submit one APOR per EN Provider Identification Number or PID, and this is important for those ENs that have multiple business models. You need to submit one APOR for each model. By now, you should have also received for those that have more than one model or more than one EN approved with Social Security, you should have received an email because the APOR is sent via SurveyMonkey which is an email that is sent to the signatory authority. And for the ENs that have the same Signatory Authority for both models, that signatory survey may go to your program contact, and we already verified the information with you. TPM will send reminders, I mentioned, until the deadline. We're going to send it every Monday expect for holidays, and as a reminder, failure to complete the APOR by February 26 is a violation of your TPA agreement and SSA can limit your ability to assign Tickets and receive payments or even terminate your TPA. Any questions about APOR? The email address is [ssaenapor@yourTickettowork.ssa.gov](mailto:ssaenapor@yourTickettowork.ssa.gov). Next slide, please.

So the survey link will be sent to the signatory authority, like I mentioned, I know that previous years it has been sent to other point of contacts, so please take a note of this and I ask you that you as a program contact, Ticket holder point of contact, or any other role that you have in your EN and are listening to this presentation, that you talk to your Signatory Authority and let them know that this survey is going to come directly to them and be on the lookout for that email. And to be in communication with them to help them complete it. And most Signatory Authorities will probably just receive it and give it to somebody else to complete. So, just be in communication with them.

Please ask them to check their spam folders because sometimes though we have those issues, you may think you don't receive it but it's because I don't know, maybe at your end there is an issue firewall, different things that can happen. So, we ask you to also check spam folders and make sure that you receive the link. The link is SurveyMonkey and is sent via the SSA EN APOR inbox, and again is going to be sent as soon as it starts early on January 29. Next slide.

The APOR survey instructions are already posted on the website. We posted the frequently asked questions and also the 2024 APOR questions. The reason why we do this, obviously, is because we want you to be ready and prepare your answers for whenever you receive the link and you are just ready to go and input the information.

The link, I mean the survey, should be completed in one sitting. So when you start, complete it, submit it and be done with it. So, we are providing you the questions in



advance for you to prepare those answers. One change for this year is that you will notice that the questions are less. As a matter of fact, we only have 17 questions for 2024, versus the 32 questions that we have for 2023. So it's less questions that are already available on the website. We are adding the link here, but I also see that Britney posted them on the chat, so you can go ahead and review them and prepare your responses. Next slide, please.

Alright, so we are going to move now to the questions themselves. Next slide.

The questions are divided into three categories, we have general questions, staffing questions, and EN service-related questions. Next slide.

For general questions, we have 10 of those and they're going to include topics such as your business model, the location, your State Vocational Rehabilitation vendor status and also underserved populations. I believe what is relatively new this time, and we probably had it last time but I'm not 100 percent sure if that was added last year. But the underserved populations is a little bit, still a little bit new to all of us, however, that information has been included in the TPA [inaudible], and also in the TPA change form. So you're already familiar with it. And it's just asking for the populations that you're serving, and the list of categories which have been added now to this APOR. Next slide.

For staffing questions, we only have two, and you can see them right now posted on the screenshot that we have, and these regard suitability. Next slide.

The EN Service-related questions are five, and it asks about your services and whether your EN has resources available to serve specific populations such as youth in transition, veterans, individuals with physical, hearing, mental, or cognitive impairments, and self-employment. Next slide.

Completing the survey. We are highly recommending you, if you want to, before you are completely done with the survey, you can also print each of the page for your records. That is optional if you want to do it, and the reason why we are highlighting this is because once you are done and you submit the survey, you cannot go back and see the responses that you submitted. So, before you click done, make sure that you print each of the pages. When you submit the APOR, you will receive an email from the same email address, confirming the submission. And well, there's also a note that the survey is not complete until you click done. Sometimes when you see the screen you may think, oh, I'm done, I see the screen, well you have to make sure that you click the button that says done. And that will trigger the submission directly to TPM.

Next slide, please.



We have the APOR online resources, all of them are posted on your Ticket to Work website, under Resource, Resource Documents. We have the APOR questions, the 17 questions are there, and we also have the frequently asked questions. We are going to post this presentation with the recording and the transcript on our EN Essentials section of the website and of course, if you have any questions, you can send them to the ssaenapor inbox, and we just ask you that you include in the subject line, APOR Assistance and your PID. Next slide, please.

And now we are going to open the questions for APOR or [inaudible] if we have time. Back to you, Derek.

**Derek Shields:** Thank you very much, Ana, for walking us through all that content. I know that we'll have questions that are APOR focused, if we could start out really limiting to that area right after Ana's presentation, that would be helpful. We'll open it up more broadly after. If we can go to the next slide, please. We have some reminders about how to ask those questions.

Obviously, chat is active, you can put your questions in there, and we'll be reading some of those. If you want to use the telephone, the two-step process starts with star five to raise your hand, we'll unmute you, and then again you have to hit star six to speak. You can just reason your hand in Teams and Katherine will call on you that way. And we have the three email addresses on the screen, for Security Awareness form questions, that's [TTW222@ssa.gov](mailto:TTW222@ssa.gov). And for APOR, the content that Ana just went through, please use [ssaenapor@yourTickettowork.ssa.gov](mailto:ssaenapor@yourTickettowork.ssa.gov). Those are the key email addresses for this cycle, January 29 to February 26. Let's start by going to Britney, Britney, I know that there's been some activity in chat, anything that you can call out in particular for us, please?

**Britney Boyd:** Yes, I have a question from Joylette. Question on the survey for number 12. What if you did not lose any employees in the past year?

**Derek Shields:** Thanks Britney. Ana's turning on her mic, looking a little pensive. Go ahead Ana.

**Ana Morales:** Yeah, I'm not sure exactly what she's referring to, but again, the APOR is a requirement, you may go ahead, and I mean list all the answers based on the questions that if you didn't lose any employees for the past year, I'm not sure if this is APOR or of this is TTW related, I'm not a hundred percent sure. So I guess, Joylette, if

you can clarify that will help us. She put, it only gives a yes or no action, I don't know if that makes it any clearer for you.

**Derek Shields:** Ana, Erinn has turned on her microphone. Erinn, over to you, please.

**Erinn Weidman:** Yeah, so question 12, that's the one that's asking if you've notified SSA of any employees who have suitability that are no longer working under your TPA. We're really just trying to, with that question, we're trying to ensure that if you have any employees that are no longer working at your organization, that you've notified us about that. So if you have had no staff changes, I would say just choose yes, because you've notified us of any staff changes that have happened. There were none, but in theory you would have then notified us.

**Derek Shields:** Thank you, Erinn. And it looks like we got a thank you in chat for that response. Britney, any other questions in chat.

**Britney Boyd:** Yes. I have a question from Steve, he's asking what about the Work From Home request form. Is that something that needs to be submitted with APOR and if so, has it been discussed in here in this presentation yet?

**Erinn Weidman:** That's a good question and it was not discussed because that is not required as part of the APOR anymore. You need to complete those forms annually, however, you have to submit it via your services and supports reviews. The same as your Partnership Plus agreements, and the same as your benefits counselor credentials. So that's why we are not discussing any of that in this presentation now.

**Britney Boyd:** Alright, I have another question from Lauren. Can we request that the APOR be sent to the Program contact?

**Ana Morales:** So I would say the reason why the Signatory Authority is the one that is going to receive the APOR is because the EN is awarded to the Signatory Authority responsible for the EN. The same as suitability, right? Unless your EN has a suitability point of contact. So that's why it's going directly to that specific person that has that role. We understand that some of them may not be that involved in the day-to-day operations of your EN, and that's why we're asking you to be in communication with them, so they are aware and on the lookout for those emails. Now, if you can request it be sent to somebody else, I will say let's wait for the process to go on, if you're having issues or that person is not receiving it, if that person decided to take a month vacation and you cannot, and that person cannot check that email, then send an email to the inbox and

then they are going to provide you with more guidance. Specifically, that would be to the SSA EN APOR email box.

**Derek Shields:** Yes, thank you. Because now we have three different email addresses for inquiries, but yes, that's the correct one for APOR. Thanks. I'm going to bring up a question that I see in chat, that's specific to workforce entities, and we may need a little bit more information. The question specifically is – can you comment on the role of workforce ENs, American Job Centers, EN is the regional workforce board but Ticketholders are served by workforce board employees, plus our contracted career services staff and many of the State Department of Labor staff. So there's a few different elements there, I think we're getting at a question that says there's a lot of people that are involved in the EN, do all these different individuals need to be accounted for? And then there's a second part that we're assuming this is about APOR, but it could be about our previous content too. So Ana, when you hear that, is there any more information that you would need in order to answer that question? We got the question in chat.

**Ana Morales:** I will chime in on them if Erinn or somebody else from SSA can also add more, I'd appreciate it. But yes, all workforce agencies have to complete the APOR and the 222. In this case, it seems that is because it's too broad, right, to many individuals in both. So when that happens, we are saying the same message that we were saying before, only for those individuals that are involved in the Ticket to Work area. Because the same is for workforce is the same for any other EN that is that big, with other projects or programs that they run, and we're concentrating on the ones that are involved directly with Ticket to Work business itself. So, Erinn or Mel or Nat, do you want to add anything else on that?

**Melanie Webb:** Yeah, this is Mel – oh, go ahead, Erinn.

**Erinn Weidman:** Oh no, I didn't really have anything else to add, so go ahead.

**Melanie Webb:** Yeah, I was just, Ana, going to agree with you. I think that in terms of the APOR, because this was a new requirement starting last year where now we do require workforce agencies to complete the APOR, they did not have to do that before. I think that was the first part of your response. And then secondly, just in terms of who needs to complete the necessary paperwork, it would be for those who are directly supporting the Ticket Program that we would need to have the forms for.

**Ana Morales:** Thank you, Mel. So directly supporting the Ticket Program out of all this workforce employees or contracted support services employees. If they're directly



supporting the Ticket Program, they would have to be included. I do have, well we just got a big post for some program resources.

**Derek Shields:** Somebody else has asked, who can't find the 222 form, I know Tammy, you had that, but we also see a post of a lot of resources there. We can get a follow-up on that, that would be good. Before we go to raised hands, I'll go back to Britney one more time. Britney, any other questions from chat that you would like to call out that are focused on APOR?

**Britney Boyd:** Yes, Kim asks, can you repeat what will be sent to the GSO weekly until they are removed?

**Ana Morales:** What I said weekly was the GovDelivery email, which is the communication that Social Security sends whenever they need to share information with the ENs. So we're going to send weekly reminders about APOR and about the 222 Form, until you make your submission, and once you do your submission, we're going to remove you from the list and you're not going to receive those reminders anymore. So, I guess that's a good hint if your Signatory Authority has been giving you your SurveyMonkey link or if you know that it is pending, and you keep receiving those reminders, that means that we haven't received your information yet.

**Derek Shields:** Thank you, Ana. Alright, let's switch over to raised hands, I believe we have a question. Katherine?

**Katherine Jett:** Hi Derek, we have Anthony. Anthony, you are unmuted. Please unmute up top and ask your question.

**Anthony:** Thank you, it was answered already, thank you.

**Derek Shields:** Thank you very much, if you do have a question and you'd like to ask it live, just raise your hand or via telephone, star five followed by star six, a two-step process there. In the meantime, you can also add questions into chat. We've gotten through a good amount of APOR related questions. Please feel free to ask any questions around Security Awareness Form and Addendum process, or the APOR process as we enter the final portion of today's session. We have a question here; Natalie asked, can we get copies of the PowerPoint? Ana, you want to describe where that is?

**Ana Morales:** Sure, we are going to, I don't think it's posted yet, but it's going to be posted soon and including the audio and the transcript of today's session. And it's going

to be on the Your Ticket to Work website, under Training and Resources, and EN Essentials section. And you can also, this is another pitch, you can also review all the previous EN Essentials that we completed last year. They're all posted in the same place.

**Derek Shields:** Thank you, Ana. So, we will have that content available for your review on the Your Ticket to Work website along with the details and recap of this session. And those emails will be coming out that will give you the key links. Tammy's just posted the link for the EN Essentials Learning Events on chat as well. So we encourage you to go check that out and explore that content. Let's circle back over to, oh Katherine, looks like we might have another raised hand. Katherine?

**Katherine Jett:** Hi Derek, we have Steve. Steve you're unmuted, please ask your question. Just click the microphone up top to unmute and you can ask your question. And while Steve gets his microphone active, we'll turn it back over to you, Derek.

**Derek Shields:** Alright, thanks. We can get you in there, Steve. Go ahead and keep trying, two-step process, we'll be glad to take that question. In the meantime, let's check in with Britney about another question coming up from chat. Britney?

**Britney Boyd:** Yes Derek, I have a question from Sandra. Do you have to complete the APOR form once you are answering the questions, or can you stop the process and go back to it before you hit the Done button?

**Ana Morales:** Good question. So, you cannot pause and then continue later, you have to do it in one sitting. That's why we are providing all the questions in advance for you to prepare your answers and once you receive the link, to just go there and you complete it at once. You cannot pause and then come back later and finish it.

**Derek Shields:** Thank you, Ana. Katherine is working to get Steve to ask the question. If you're not able to get your audio to work with us today, we do encourage you to submit the question via chat if possible. Otherwise, you could always follow-up after the session or right now for that matter, with an email to our two email addresses; [TTW222@ssa.gov](mailto:TTW222@ssa.gov) for Security Awareness form questions, and [ssaenapor@yourTickettowork.ssa.gov](mailto:ssaenapor@yourTickettowork.ssa.gov) for APOR related questions. Britney, any more questions from chat?

**Britney Boyd:** Yes, a question from Cathy; on question five, I'm trying to determine which selection best describes our organization. We are a nonprofit organization, we are not Ability One, we provide services to individuals with disabilities, including



community services and job coaching and job placement. What would I put under if other nonprofit, what would I put?

**Derek Shields:** Thanks for that, Britney. Ana, were you able to follow that description and try to figure out the choice for that.

**Ana Morales:** I was going to say, that's an SSA question.

**Derek Shields:** Alright, maybe we can get Erinn to come on. Nonprofit organization, it's easier when, for me, I heard Britney read it, but Erinn, do you need it repeated or do you have an answer?

**Erinn Weidman:** No, I'm good. So, the reason that we're asking for you to kind of describe if you're choosing other nonprofit, or other for profit, is to determine if there are other types of organizations that we're maybe excluding on our list. So, if you would describe your organization as a specific type, I'm trying to think, I'm only of course thinking of things that are already on our list, but a [inaudible] or something like that, I understand that's already on your list, you could put that there. If that's not the case, you could put just something like a 501(c)(3), if that's just generally how you would describe your nonprofit. I hope that answers the question. Please let me know if it doesn't.

**Derek Shields:** Thank you, Erinn. It sounds to me like there's some flexibility for that organization as a nonprofit to describe themselves with words of their choosing. And they could do that, so if you don't feel like the other descriptions fit, then describe your nonprofit as you prefer and that might build a new category moving forward. Thank you, Erinn. Britney, any other questions?

**Britney Boyd:** No other questions at this time.

**Derek Shields:** Alright, so we'll make one final call, we've had a good number of questions. We understand that often you need clarity on both of these and that's the purpose of today's session. We have some time left if you'd like to raise your hand to ask your question live, please do so. If you have other questions, you can certainly drop them in chat as well. We'll just be patient for another moment or two and see if we can get some more in.

So there's a question about sharing notes, Social Security has some rules about having AI meeting notes software involved and that was stopped earlier. We do have a transcript from this and we'll be providing the summary of today's EN Essentials on the EN Essentials page. Tammy posted that link in the chat earlier. So those notes will

become available along with the presentation slide deck, and then of course you'll have these weekly emails coming out through GovDelivery as well. So we encourage that, and we'll update you once the EN Essentials page has that content there, you'll receive an email informing you that that is there.

There is a question here that just was posted, I can see — Is the '24 APOR currently available in forms? Ana?

**Ana Morales:** Yes, it is, I was actually copying and pasting the place. It is on the website under Resources, under the Resources Document section. And it's posted already, the Frequently Asked Questions and also the 2024 questions themselves. So you can access that. There's some links that have been shared throughout and I know that this is sometimes hard to be listening and following chat and looking at the content on the slides, so these resources when they post, you can go through the slide deck and find the content there as well.

**Derek Shields:** Appreciate that.

**Melanie Webb:** Oh Derek, I just, I wanted, sorry, this is Melanie with SSA again, one other thing that I wanted to mention just in terms of the difference from this year. Ana mentioned a couple of the questions that we no longer require and that it's shorter. One other thing that we developed that we're hoping ENs will find helpful is that in the past the FAQs that we included were not numbered and we just pulled out the questions that we thought needed the most clarification, so there was not a one-to-one FAQ for every question on the APOR. And this year, you'll notice that after the instructions where it explains the purpose of the APOR, and who needs to complete it, it's actually numbered, so there's a corresponding response for every question. So as you're going through it in advance, if it's helpful, if you feel like it isn't clear or you need more information, you can just find that corresponding number. So I wanted to mention that is a difference also, because it is more helpful.

**Derek Shields:** Thank you very much, Mel, appreciate that, and your and Erinn's participation today to bring deeper answers and some more clarity on specific questions. Speaking of questions, I think this will be our last call to submit a question. And if you like, you can raise your hand or submit it in chat. Otherwise we'll go to wrap up in a moment. It looks like we do have one more raised hand, Katherine.

**Katherine Jett:** Hi, we have Anthony. Anthony you are unmuted, please unmute your microphone and ask your question, please.

**Anthony:** Hi folks, just a quick question; I want to take vacation on the 22nd, I'll have, all this stuff will be available to me before the 22nd for submission, right?

**Ana Morales:** Let's clarify first; the 22nd of which month?

**Anthony:** February.

**Ana Morales:** Yeah, you can do all this in between January 29 and that vacation date.

**Anthony:** So I will get the APOR and the SurveyMonkey from the Signatory Authority by then? I just sent out emails and texts for them to be on the lookout.

**Ana Morales:** Yes, yes. All of the links, all the links for SurveyMonkey will be sent, January 29 to all the ENs that should complete the APOR. So please well yeah, talk to your Signatory Authority, you will have plenty of time before your vacation to get it done. And the same as the 222, it starts that date as well.

**Derek Shields:** Thank you for the question. I was going to thank Anthony as well. Excellent. Do we have any other raised hands, Katherine? Alright, thank you very much, Ana, for the content and presentation today. And thank you all for the questions. If we can move forward to the next slide, please.

So we do have some upcoming events that we wanted to share with you in case these weren't on your calendar before we go to close today. Tomorrow, January 24, we have a WISE webinar entitled; Exploring a New Career with Ticket to Work. We'll be pleased to be joined by Rebecca, a Ticket to Work success story, as she will be interviewed about her career change and how it led her to a new purpose, and we hope that you and your colleagues can join us for that event.

On February 14, that will be our next EN Essentials, Valentine's Day, of course we have that entitled; Gotta Love Payments. That will be followed with a Part 2 on Payments on March 13, called; Take a Deeper Dive into Payments. We're pleased to have our experts from the Payments Department join us.

March 19 will be the first quarterly All EN Call of the year. All of these calendar of events items are listed on the Your Ticket to Work website under the Calendar of Events. Go into Training and you can find the All Calls, all of the EN Essentials dates, all in one convenient location.

If you do have feedback on today's EN Essentials training or other ideas for future training, we encourage you to reach out to us at [EnOperations@yourTickeetowork.ssa.gov](mailto:EnOperations@yourTickeetowork.ssa.gov) with your ideas. We do appreciate your participation today, we look forward to having a successful 222 and APOR season with you, and if you do have questions, reach out to those email addresses with those questions so we can give you quick technical assistance.

And with that, thank you, be safe. This ends today's webinar.