All EN Call Transcript
April 18, 2023

Derek Shields: Welcome to today's quarterly All Employment Network call. I will serve as the moderator for today's call. Before we begin with the agenda and our presentations, I would like to review a few logistics and housekeeping items. First, this meeting is being recorded and a transcription is also being captured.

Now to the next slide for logistics. Please always remain muted during the call unless called upon by me or one of our production team members. Please feel free to also ask a question in the Team's chat section. If you wish to ask your question aloud, raise your hand and your mic will be unmuted. If joining via phone and you wish to ask your question, please raise your hand using star 5 and you will be unmuted. Then press star 6 to speak. This is a two-step process. If joining via MS Teams and you wish to ask your question aloud, please use the raise your hand feature. Please limit questions to one per participant. Additional comments or questions can be sent to us at enoperations@yourtickettowork.ssa.gov. This email inbox has also been posted in chat. Those questions not answered during the live event will be forwarded to the appropriate panelist for responses.

Closed captioning is available, has been tested, and is working today for participants who joined using the MS Teams application or by using the separate closed captions link provided in MS Teams. Go to the three ellipses at the top of the MS Teams more menu and click on "more actions" if you prefer to use turn-on live captions. Our team will be posting the closed captions link for you a couple of times today to help you access that as well. When using the link option, paste the link in the browser and it will open up a separate window where you can view the closed captions. Again, two options: the separate link or use the more feature to access the MS Teams' automated translations.

It is now time to review our agenda. We will start out today with Dr. Cara Caplan with the Social Security welcome, followed by Payments Reminders Update, EN Updates and Reminders, Training Curriculum, Learner Pathways, and the Communications and Outreach Update. All of this in just over an hour, followed by a 30-minute question-and-answer exchange. It is now my pleasure to introduce Dr. Cara Caplan, Branch Chief for the Office of Employment Support and Social Security's Office of Research, Demonstration, and Employment Support. Cara will provide our opening remarks.

Cara Caplan: Thank you, Derek. I would like to welcome everybody to the quarterly All EN Call. As Derek said, we have a very packed agenda. I would also like to welcome five new ENs: VentureLINX, located in Ohio; Mariela Communications out of California, Workforce Escarosa in Florida, Deaf Employment and Advocacy Firm in Texas, and Ticket to Success LLC in Ohio. Welcome. Whatever you need to be successful, we are here to help you.

Derek Shields: We are pleased to welcome Katie Striebinger, Payments and Systems Support Branch Chief in the Office of Employment Support. Katie is going to provide us with a few key payment reminders. Katie, welcome.

Katie Striebinger: Good afternoon, everyone. Sorry, I was having technical difficulties earlier.

Derek Shields: We hear you clearly. You sound great. Go ahead.

Katie Striebinger: I will consider this my sound check and my presentation to save time. Good afternoon, everyone. I just wanted to spend a few minutes on EN payment reminders. We do not normally give EN payment updates during this call because we have a quarterly All EN Payments Call at the same time.

Our next call is coming up on Tuesday, April 25. If you did not receive a reminder for that meeting, please register through the EN help desk, the EN payments help desk specifically, and we will make sure that you receive our messages.

The EN Payments Call is a helpful call. We go over anything from EN payment basics to reminders and best practices. On each of our quarterly calls, we give ENs guidance on our upcoming ePay process. Typically, our quarterly call is held the week before we start issuing our quarterly ePay payments.

If you are unfamiliar with ePay, it is a process where eligible ENs are paid automatically by SSA for any payments, starting with Phase 1 Milestone 4, all Phase 2 Milestones, any Outcome payments, and any that may be due for any currently assigned Ticketholders. These are automatic payments SSA makes without the EN having to take any action.

Our team works from a list of SSNs to make the payments. For this reason, we ask again to hold off on requesting payments that rely on the earnings already proven message in the Portal for earnings evidence. Specifically for these payment types, Phase 1 Milestone 4, all Phase 2 Milestones, and all Outcomes. ENs that request payments for the SSNs that are already in our ePay file cause a duplication of effort and they end up slowing down payments.

During our last quarterly call, we received 1,000 payment requests for a week straight. And we ended up having to halt our ePay file, which slowed down payments for everyone. I wanted to remind you about this guidance for ePay payments because it is really important to us and to everyone on this call that everyone is paid timely, and that we all work together to make sure that our staff can process things efficiently and accurately.

We will send a reminder message to everyone when we start the ePay file so that you are aware that we have started. That message will include guidance about not requesting payments via the Portal. Now, if you are requesting Phase 1 Milestone 1, Phase 1 Milestone 2, or Phase 1 Milestone 3, please go ahead and request those payments. We are not asking you to slow down requesting those payments.

In addition, if the earnings you are using for those specific payment types I just mentioned (Phase 1 Milestone 4, Phase 2 Milestones and Outcomes), and if you're including earnings evidence, you're not relying on ePay to get paid. You can submit those payments through the Portal during the ePay process. We are trying not to duplicate the process where there are already earnings in our system and ENs are relying on those earnings for payment at the same exact time that we are processing the ePay file. So, I encourage you, one, to reach out if you did not receive the message about the All EN Payments Call coming up on April 25 so that we can get you on to that call. And second, to read the message that we send out. We all want to work together to make sure we all get paid. Thank you.

Derek Shields: Katie, a quick question for you through chat. This says, "How do we reach out to get on the All EN Payments Call to make sure that they can attend next week?"

Katie Striebinger: We will put the email address in the chat window. Reach out to that help desk and they can make sure you are added to our list.

Derek Shields: Brittney just added that enpaymentshelpdesk@yourtickettowork.ssa.gov. Thank you so much, Katie, for coming on today and sharing those updates with us. We appreciate your time.

Okay. So, next, we're going to move forward to our next presenter. And we're going to bring back Dr. Cara Caplan, Branch Chief of the Office of Employment Support. Cara has quite a few EN updates and reminders. Cara, to you, please.

Cara Caplan: Thanks, Derek. As Derek said, there are quite a few things. First, I want to talk about approved cloud storage and the process for approval. Any cloud storage service utilized by any EN must be FedRAMP-approved. We are sharing the link in the chat for the list of FedRAMP services. ENs must send verification of the service they have and intend to use for SSI approval. This can be a screenshot, but it must include the subscribed licenses and the cloud configuration settings.

ENs should not store anything in the cloud until and unless they receive approval from SSA in writing. ENs will need to submit cloud storage service verification annually as part of your Service and Supports Review.

I'm going to go on to the Annual Security Awareness Certification or 222 and also the APOR update. The last day to submit for both was February 27. We had many ENs who did not comply timely. We sent them reminders, we sent Cure Notices, and as a result, we terminated 14 ENs for non-compliance. It is a violation of your TPA.

There are several different items that we collected through APOR for only this year for the work-from-home request process. That is currently in progress. We received many of them and staff are working through those as quickly as possible.

We completed the Partnership Plus agreement process and added the badges to the website. SSA notified ENs of their approval or denial.

The proof of workforce entity: processed and completed. The badges are on the website, and SSA notified ENs of their approval or denial.

And the same for the Benefits Counseling certification, which we also notified ENs.

SSA will not collect these four items through APOR anymore. It was a one-time thing to make sure we were up to date with everything. They will be collected through your Annual Service and Supports Review. So, for this year, you will have to submit them twice. You have submitted it with your APOR, but you should have everything available to submit when the Analysts ask for information with your Service and Supports Review. And if it does not apply to you, just don't send it.

As for your annual Service and Supports Reviews, we want to make sure that Ticketholders are receiving the services and supports necessary to be successful and that all TPA requirements are met. So, SSA directed TPM to provide a more robust annual Services and Supports Review. Some of the examples of what TPM includes in the review are: confirming that Ticket assignments and payment requirements are being met; ensuring the suitability of staff working with Ticketholders and comparing previous and current review results for improvement or identifying continuing patterns of non-compliance.

We want to make sure all the IWPs are completely individualized and specific to that Ticketholder.

Based on EN compliance of the requirements, as outlined in the TPA Part III, Section 4, the EN receives an overall rating of either compliant, needs improvement or non-compliant. If you are compliant, that indicates the EN satisfactorily met all the requirements with no or minimal issues. If it needs improvement, that indicates you did not consistently apply the requirements. And if it's non-compliant, that indicates the EN did not meet the requirements. If it was non-compliant, following that review, Program Integrity will schedule a technical assistance session with the EN to discuss the areas needing improvement and the required next steps.

All main key contacts listed on the TPA, as well as all suitable staff creating IWPs, must attend the TA session. Program Integrity will then review your EN in six months. SSA will place the EN on an ePay suspension until, at the minimum, the EN passes the six-month S&S Review.

I am going to move on to personally identifiable information, PII. So, there is a first violation, a second violation, a third violation. For the first violation, you must attend mandatory training, and all the main points of contact and the violator are required to attend this training. We would encourage everybody from your EN to attend because person A may make a PII violation the first time and person B may make it the second time, and that would still count as a second violation against your EN. The third violation may result in termination. So, we take this very seriously.

TPM will offer training twice a month, via MS Teams. TPM will post the calendar in advance and invite you to a specific session. You will need to attend the training as a team on the assigned date. If the main point of contact fails to attend, all members of the EN must attend the new session.

Ticket Portal. We recently sent out a blast about that. Again, this is a security measure. SSA sent the blast addressing the changes on the 21st of March to all ENs.

We indicated that SSA limits Portal access to individuals who have a business need and plan to access the Portal regularly for each EN. SSA makes protecting its information a top priority. The Ticket Portal uses the highest level of security available to the agency and allows service providers to safely and securely do business with SSA.

We learned that, unfortunately, Service Provider Foundation Training included all EN employees. That was a mistake. As a result, there are Portal users who have no business need to access the Ticket Portal. To correct this, SSA will begin reducing the number of staff authorized to access the Portal to active users who have a business need.

As of April 1, SSA removed Portal users for individuals who have not accessed the Portal in the last 180 days. We're currently in the process of removing over 250 users. So, as a reminder, Ticket Portal users must access the Portal at least once every 90 days or your account will become inactive. After 90 additional days of inactivity, for a total of 180 days, SSA will remove the user from the Portal without notifying the EN.

If you are removed, you will have to go back to the training before you're allowed to be reinstated into the Portal.

It is critical that each EN verifies the Portal users for their organizations instead of continuing business as usual. The GovDelivery explains how to do that in the Portal.

Social Security also indicated that mandatory Service Provider Foundation Training for main points of contact through the Learning Management System, Bridge, will continue. All other EN staff may access training through the Your Ticket to Work website. And we will provide the link in the chat.

SSA and TPM will do a mandatory triannual employment verification. EN Service will reach out to each EN three times a year. One for the 222 and two additional times to verify all your employees. At the end of March, we updated the TPA Change Form to capture significant changes to optimize the SSA database and to capture necessary information such as corporate status categories, underserved populations, type of organization, and so on. We also added to capture Ticket Portal users and we are going to also change it one more time, probably within the next week so it captures all EN employees.

You must send in an EN Change Form for any changes within your organization; any employee changes, status changes or adding somebody to the Portal. All of that must be done through an EN Change Form. We cannot accept it in the body of an email.

Your TPA also requires you to inform SSA within one business day of an employee joining or leaving, or a main point of contact within three business days. Many ENs are not abiding by this. And as a reminder, it is a violation of your TPA and an EN can be terminated for that.

When sending any email, please make sure to state the acronym PID and your nine-digit PID number. You should put, for example, PID123456789, with no spaces. And please make sure you do not write the nine-digit number with dashes as if it is an SSN. We do receive some of those and those get flagged as PII violations, even though it is not an SSN. To the agency, it appears like an SSN. So, please make sure you do the PID nine digits.

In the subject line, include the EN name and the state, and that will make the process go a lot quicker. When you do not include those things in the subject line, it slows down the process. So, recently we have sent out, as I have mentioned, a lot of GovDelivery messages. These are all reflected in your TPA, which can be found on the SSA website. So, as we make major clarifications or some changes. We do update the RFA, and it is your responsibility to constantly go back and look for any changes in the RFA.

When you are corresponding with EN Service or SSA, you do not need to CC the Training and Activation Analysts, formerly known as the Account Managers. A lot of people are doing that and it is causing a lot of confusion, miscommunication, and sometimes an EN getting the wrong information. So, please make sure you are contacting the right place with your questions.

Most general questions should go to ENService@ssa.gov. Your payments questions should go to the payments help desk. Just make sure you are sending it to the right person. Training questions go to the Training and Activation Analysts. And I will hand it back to you, Derek.

Derek Shields: Thank you very much, Cara, for the EN updates and reminders. We will have you back in a little bit for our Q&A session. Now, it is my pleasure to turn to our Training Curriculum Learner Pathway updates, which will be provided by Ana Morales, the EN Development and Training Manager for the Ticket Program Manager. Ana, over to you,

Ana Morales: Thank you, Derek. I am going to cover the Training Curriculum Learner Pathways. This is based on the changes that Cara talked about, the Ticket Portal and the training curriculum. As of April 1, we implemented all these changes in the Learning Management System, Bridge. TPM implemented these changes for all the learner pathways for the users that we have in the training. Little by little, we are starting to implement these changes to current users but also the ones that we are adding to the training curriculum. So, number one is that we are going to initiate all the training sessions for the main points of contact using the new TPA Change Form that Cara alluded to during her presentation.

All the main points of contact that we receive via EN Service, we will add them in training as we received them. If a signatory authority of an Employment Network participates in the day-to-day operations of the EN, they will have to complete the curriculum or the learner pathway for the program and the Ticketholder learner pathway. The Signatory Authority or the Program contact will designate all Ticket Portal users via the TPA Change Form. Portal users are a business need, so they must be enrolled in training. We need to make sure that everybody is of the same understanding, that it is a business need. So, they must look at what the EN has already — and this is part of the GovDelivery message sent on March 21. ENs must look at the business need of the EN, look at how many Ticket Portal users they need and by that, send one TPA Change Form per user. And that is specifically Section 4 of the TPA Change Form, which is page 9. It must be very particular because that is the information that the EN Service Team needs to complete in the system. And that is what the training team also needs to initiate the training. We will update this information on the website and in the Training Resources. That information was taken down from the website, but we will update it.

The next slide is a new visual of the learner pathway to help you put in perspective the whole curriculum and the different phases of the program.

So, the training starts with EN Orientation, which is a live session with the Training and Activation Analyst. TPM invites all the main points of contact to attend that session along with the Ticket Portal user.

Phase one includes two modules, with one learning check and two checkpoints. Those two checkpoints are the e-Qip submission and the *my*SSA account with extra security. I also want to make sure that you know that I am talking specifically about the Ticket Portal user. This is the only user that has access to the Portal obviously, and the one that has the most modules in the system. Since any program contact within the EN needs to be designated as a business need, they need to go through all the different areas of the program. So, they need to be well-prepared to have access and be able to operate in any area of the program within the EN.

After they complete Phase 1, they move to Phase 2. Phase 2 has three modules and one learning check. Once they cover that, they move to Phase 3. Phase 3 has nine modules and five learning checks.

One thing that is different is that we moved the checkpoints of suitability and Ticket Portal access toward the end of the pathway. Now, suitability for the Portal is going to be toward the end. So, at the end of learning check number 6, the learners are going to stop and have a checkpoint for suitability. Everybody should be suitable, and then they will have access to the Ticket Portal. They will then request Ticket Portal access through EN Service. After they have access to the Ticket Portal, they will have the last module, which is the Ticket Portal for ENs, and then one last learning check. And after they are done completely, they will have their certificate of graduation and be able to start operations within the EN.

We are going to update all the learner pathways for all the different main points of contact per the EN. This means the program contact, Ticketholder, suitability contact, and the payment points of contact. We will update this information on the website and all the training resources.

Let's move to the next slide. You may think, what about all my other staff that need training? So, we have additional resources that we have mentioned several times. They must do what Ben is doing in the picture. They must go to the website and review all the modules that are posted, all the information that is available, and if they have any questions and need additional information, they can reach out to the EN Operations inbox, and we will be happy to answer any questions for them.

Something new that we want to announce is that we will have supplemental training available. We will start offering group training sessions on a variety of topics. Stay tuned for more information and that will be coming soon. And with that, I am going to turn back to Mr. Shields.

Derek Shields: Thank you very much, Ana, for going through the updated learner pathways. I know that we have had some questions in the chat. Natalie and others are busy trying to respond, and we will have an open Q&A and Ana will be back with us for those questions shortly.

In the meantime, I would like to provide an outreach update on behalf of the Communications and Outreach team doing our work. You know, the Ticket Outreach team promotes Ticket to Work, and most of you are familiar with this, to ensure that the content is getting out to folks through a variety of channels in the ways that you as ENs hopefully have an opportunity to use and repurpose. And I am going to share a couple of updates on those with you today.

Next slide, please. First are our WISE webinars, the Work Incentive seminars, our online events designed to explain the Ticket Program, and Work Incentives through accessible learning opportunities. As is custom, they are held on the fourth Wednesday of each month. And we have an average range of attendees from 400 to 600, depending on the topic. The next WISE topic is next week on April 26, and registration is now open.

Britney kindly posted a link in chat, and we encourage you to share that so we can have more folks registered to learn how will work affect Medicaid or Medicare benefits. Again, that's April 26; that is Wednesday from 3:00 to 4:30 p.m. Eastern Time. TPM does send sample social media posts for ENs to share every month through GovDelivery, and we encourage you to repurpose those at your convenience.

Looking ahead for WISE webinars, on the next slide, we give a rundown of May, June, and July. In May, we are pleased to bring in a guest to present on Ticket to Work for America's Veterans. This webinar will discuss pathways to employment for people who receive both Social Security disability and veterans' disability benefits. That will be in May.

Following in June, on June 28, the WISE will focus on Ticket to Work for People with Mental Illness. This webinar is going to be a general overview of the Ticket Program and content specific to people who have and live with mental illness. This is clearly one of our largest groups to receive disability benefits.

And last, on July 26, the anniversary of the ADA, we will be focused on Reasonable Accommodations and the Path to Employment. We will also have a guest presenter on what is one of the more popular WISE and provide information on how to succeed in the workplace with reasonable accommodations. It is a popular webinar and it will be on the anniversary of the ADA, and we encourage you to start using May, June, and July in your outreach efforts as well.

So, now that we have covered WISE, let's move forward to the next slide, please. As you know, Choose Work Social Media is on a variety of platforms and we schedule daily social media posts through Facebook and Twitter. These posts highlight other content, including the prolific blog posts that come out, sometimes about four per month, Ticket Program resources and the fact sheets that are available, along with our monthly webinars.

Importantly, success stories are also available. Both success stories and stepping stone stories through social media posts, look at how Ticketholders are making improvements through Ticket to Work and Work Incentives. We also share important Social Security updates through those social media posts along with relevant information from our federal partners at other key agencies looking at disability employment.

Per fact sheets, we have Ticket to Work fact sheets, and this month, we'd like to call out again, What is Social Security's Ticket to Work Program? We share a link on the slide here and in the chat. We encourage you to share this with Ticketholders to help learn more about Ticket to Work as their point of entry and learning about what is possible.

And the next slide, please. Now, please again, emphasize success stories. These feature individuals who have achieved financial independence with the help of the Ticket Program. I also mentioned before, the stepping stone stories. These are stories that feature individuals who have made a major step on the path to financial independence but have not yet eliminated their reliance on the benefits. Our program recognizes that both are important, and we encourage you to share these stepping stones and success stories in a purposeful way in your networks.

On the next slide, we have our latest success story. And as my colleague Ray would say, this is a great one. So, Jessica's story is available on the Choose Work homepage, and on the Success Stories' navigational tab. Jessica was born with cerebral palsy and felt stigmatized her whole life. The success story walks through some of her feelings during early education and how people painted her into a corner of what could not happen in her life. Instead, obviously, the story went in a different direction.

And after getting her master's degree, she did not want to sit on that degree. She wanted to enter the workforce, so she contacted the Choice Group, a Virginia-based EN that would help her plan her career. First off, creating that individualized work plan that tagged the things that she would need in planning like benefits counseling. And she learned about the impact of earnings from work on her disability benefits and navigated her job hunt when she determined what she wanted to do. In the end, Jessica landed a position at Virginia Counseling Associates, and she works with clients of all ages, addressing the symptoms of mental illness.

And I have a quote here from Jessica that wraps up the success story. It's, "Ticket to Work has made it possible for me to see a future with support and less debt. I have options that were out of reach and now it is liberating."

So, we encourage you to share Jessica's story in your network and thank the Choice Group and other ENs that are doing great work around the country. Share it or promote on your social media, become familiar with the stories, and use them with Ticketholders with similar backgrounds.

Brittney has posted a link to the success stories page in the chat. You can explore those and determine how to share these to impact the mindset of the Ticketholder. You can also use sample social media posts and contact us at socialmedia@choosework.ssa.gov to submit success story candidates. We would love to find the next Jessica.

If you're out there and you think you have a success story candidate, please send us an email. We are at successstories@choosework.ssa.gov. And if we could help promote stories like Jessica, we can reach more individuals across the country to help them find financial independence as well. Lots of ways to stay in touch.

Find us on Facebook and Twitter, check us out on YouTube with our recordings, especially the WISE on-demand series. And we encourage you to subscribe to GovDelivery updates if you're not getting those. As one of our presenters said earlier, there is a lot of email coming through there. And subscribe to the Choose Work blog for those four or so monthly updates. And last, email at socialmedia@choosework.ssa.gov. This was a lot of information. Britney has it in chat. The content will also be available in the recap from today's All EN Call.

And with that, I am pleased to now move beyond the presentation portion of today and open up our session to questions with a moderated exchange with our panel. Just as a reminder, if you are connected in through telephone today, we ask you to have a two-step process. Raise your hand by dialing star 5 and you will be unmuted. Then press star 6 for your second step to unmute yourself. If you're using Teams, of course, you can enter your question in the chat as you have been doing, or you can raise your hand and your mic will be unmuted by our production team.

And with that, just a reminder to please state your name, your EN's name, and then ask your question. We do ask you to keep your question to be a little bit more generic. And finally, hold your payments questions to those environments as well. Today we will not focus on the payments content. And with that, now I would like to return to Nicole and see if we have a raised hand and have our first question.

Nicole Black: Thank you, Derek. We have a question from Lauren Womack. Lauren, please make sure that you are unmuted and ask your question. Lauren, you can press star 6 to unmute yourself. I mean, sorry, you can press the unmute button and ask your question. It looks like Lauren just disconnected from the lineup.

Derek Shields: Do you want to move to the next question, Nicole?

Nicole Black: Yes. We have a question from Diane Winiarski. Diane, go ahead and unmute your mic and ask your question.

Diane Winiarski: Hey, thanks, Nicole. Thank you so much. Hey, Derek, I actually have two questions. I am going to start with the one that you just talked about, these success stories. We have been submitting success stories through the links that you shared on the screen. Unfortunately, we have not received any response. And our stories have been submitted since January 9. Is there anyone else we should be following up with? We are using the links that you provided, successstories@choosework.ssa.gov. Just wondering if there is anyone else, we should be following up with.

Derek Shields: I do not believe so, Diane. This is Derek speaking. My guess is — you did not identify your EN, but I have a feeling I know which EN you're with. And I do believe that they are in our success stories pipeline.

Diane Winiarski: Fantastic. And I apologize, it is also Employment Services. So, thank you so much.

Derek Shields: I do not want to guess but, yes, we do have your submissions in our pipeline. We produced and published Jessica in March, and now we are moving into the next submitted potential candidates for success stories. So, we will be in touch soon.

Diane Winiarski: Thank you so much because we want to give you the next Jessica. So, my second question is — we have been sending field office concerns regarding the A21s. We are getting feedback that DO offices are asking for the full SSN. And I think we are all aware we only have to provide the last six digits. So, we do submit our concerns to enservices.ssa.gov. And I must tell you, Tamika is wonderful at responding. But we are just following up. Is there any resolution because we are kind of seeing the same issues with similar field offices?

Derek Shields: Thanks for the question, Diane. Cara is now on screen. Cara, go ahead, please.

Cara Caplan: Yeah. And we hear many BPQY issues. It is not novel, unfortunately. And we are trying to work with our sister component and Operations but, again, our office has no control over the field offices. I mean, we have sent them messages. And as you know, I did those letters for you guys not that long ago to help with it. All we can do is — if a specific field office is giving you a problem, is to send that in to EN service, but we need to know the specifics. We cannot know the field offices in Florida. Like we need to know exactly what field office you are dealing with that's giving you an issue. I mean, even down to the person if you know that. And then we send that over to the Operations component in headquarters and it wraps through the system to hopefully help you.

Diane Winiarski: No, thank you, Cara. That is perfect. And we do provide that. We provide the DO code, the field office, the address. If we have the representative, we provide the representatives first. And if we have the last name, we are just wondering, you know, if there's any resolution that comes out. Because typically, I will get a response, "Thank you, Diane, we're forwarding this off to management."

Cara Caplan: Right. And if they do and somebody on our staff then works with the person in Operations, but headquarters is who it then has to go through — it's a whole red tape process. You have to go through the regional down to the field office, you know, to work with them. So, I mean, a lot of times there is a resolution because people mostly complain about not getting the BPQYs and then they get it. So, we know that there is a resolution a lot of the time. But like I said, and it sounds like you are doing it, the more specific somebody can be, the better we can help. And some field offices are just better than others. I hate to say it, but it is this type of thing.

Diane Winiarski: Thank you, Cara.

Derek Shields: Thank you, Diane, for the question and, Cara, for your response. And, Nicole, it looks like we have another hand raised.

Nicole Black: Yes, we have a question from Jen. You can unmute your mic and ask your question, please.

Jen: Yeah, I was wondering, what is the subscribed licenses and configuration setting? No one in our agency knows what that is and that includes our IT department.

Cara Caplan: I am not sure what you're asking, to be honest with you.

Natalie Sendldorfer: Cara, this is Natalie. If they could email enservice@ssa.gov, the email could be forwarded to the staff person that oversees the cloud configurations, and she can assist you with exactly what is required of the EN. She can walk you through that and tell you exactly what you need.

Derek Shields: So, Jen, thank you for the question. Again, the guidance is to email EN service, the specific staff person is going to be able to follow up with some cloud storage guidance. That comment was also in chat a couple of times, so I think folks were wondering what it was. Thank you, Natalie. Nicole, next question, please.

Nicole Black: Thank you, Derek. We have a question from Kim Gonzalez. Kim, please activate your microphone and ask your question.

Kim: Hi there. Thank you. My question is, do the field agents receive any training about Ticket to Work? They receive training about Work Incentives as their Ticket to Work is mentioned with the Work Incentives but specifically on the Ticket, probably not.

And just a suggestion, and this may have happened already, and I just don't know about it. But it would be wonderful to have a Ticket to Work field officer or an agent from Social Security being part of calls that are made. Whenever I have to call in or call on behalf of a client, if they have questions or discrepancies, that there's a representation of Ticket to Work because I get field officers saying different things. It is contrary to what the Ticket to Work Program is about. It is kind of tricky.

Cara Caplan: So, you are saying every time you call the field office, you want somebody from our office on the phone with you?

Kim: If there is issues, yes, especially when there's allegations of not reporting wages and overpayments. I had an agent say, "Oh, yeah, you're going to have to do a medical review." And I was like, but wait a second, they are being exempt from the medical review and she is like, "Well, they'll have to do it anyway." So, I mean, having somebody knowledgeable about Ticket to Work be part of the calls would be very helpful and you can get on the same page and kind of get rid of that fear.

Cara Caplan: That would be — I get what you are asking, which would be amazing if I had a staff of like 50 people. We do not. Most of the staff that actually help us are Cognosante contractors. Our staff is two people. So, it is very — that would be a very difficult thing. That sounds like something that would be a daily thing. But if there is a huge major issue, we could certainly look into helping with that. And maybe contact our Operations people with suggestions for that. Like we are willing to have like a call with Operations, you know, for that. And recently we did have a NENA call and she was on the call. So, the NENA board did have an opportunity to talk to our liaison in operations.

Okay. Let us get it. Or at least one call a month or something like that just so that it can be trickled down to the people that are answering the phones, you know. Thank you.

Derek Shields: Thank you for your question. Nicole, next question, please.

Nicole Black: We have Kathy DiRusso with the question. Kathy, please activate your microphone and ask your question.

Kathy: This question is for Cara specifically. You had mentioned something about the Services and Supports Review, A, is now going to require us to tell you what your cloud-based system is and that it is FedRAMP approved? And then did you also say that the work from homes is also going to have to be submitted during Services and Supports as well?

Cara Caplan: Yeah, the work from home — it's a once-a-year thing. The work-from-home requests, the cloud-based, the Partnership Plus, and if you happen to be a workforce agency.

So, all those work-from-home requests because, again, for us, the best buddies, you know, we've got many. That took us a while to get that process all up and ready and going, and we did it for the APOR. So, we are going to have to do that same thing each.

Well, I would say if something has not changed, like if your specific work-from-home form has not changed, you can re-send the same form. I do not have a problem with that. It is another way of us checking who the personnel are and to know who is working from home. I am assuming after COVID, a lot of people are working from home. But who is working from home, who is working from the office, you know. We do not know when site visits might start back up again, and we need to know where our staff is.

Kathy: Okay. I have worked from home always but when we came back, you know, after the pandemic, everyone got changed to a hybrid. They could work, Monday and Friday from home and three days in the office. And then one last thing if I may, the three responses and the outcome summary are now just three versus five before. So, we will not get something that's having paperwork or a need for technical services call. It will just be compliant, non-compliant, or incomplete.

Cara Caplan: And it will say if you need to do anything. We're trying to make it a little more simple for people.

Kathy: Agreed. That is a good thing. Thank you, Cara.

Cara Caplan: Oh, my pleasure.

Derek Shields: Natalie, you have been watching the chat, I know we've had a lot of questions and engagement going on. Any comments or responses that you would like to make to any of the chat questions?

Natalie Sendldorfer: Just to reiterate what Cara said. If there are issues with field office staff giving wrong advice to beneficiaries, I know beneficiaries will not listen to SSA staff or the field office staff over what Employment Networks are saying, unfortunately. But if you can send EN Service specific employee names that are doing this or field offices, we will escalate that issue to the office that oversees all the field offices, it would be really helpful.

Cara Caplan: And let me just say one thing too. I mean, you do have medical protection when using your Ticket. However, when we were and will be doing timely progress again, there were many beneficiaries who lost their medical CDR protection due to timely progress. So, those beneficiaries or Ticketholders may be subject to a medical CDR review even though they can still have their Ticket in use.

Derek Shields: Thanks, Cara. Before we go to the next question coming in from Kim, here's a question that was submitted. "I may have missed it if it was already shared. If we submitted work-from-home forms during the APOR, will we receive a response regarding whether the work-from-home requests were approved?" Cara?

Cara Caplan: I believe we already — oh, work from home, they are still working on but yes, you will receive it through email whether they are approved or not. They are just working through it. I mean, you do remember there are over 450 ENs. Some have a lot of employees, so they are still working through these forms.

Derek Shields: Thank you, Cara. So, to that question, if you have not received the response, the process is still in place so there will be a response coming once the work is completed. So, let us go to Nicole for the next question, please.

Nicole Black: We have a question from Kim Gonzalez. Kim, go ahead and enable your microphone and ask your question.

Kim Gonzalez: Thank you. Thank you, Ms. Cara. You have triggered something when you mentioned the Timely Progress Reviews were coming up. I have heard two different things and I am hoping that you can clear this up. I have heard that timely reviews are based solely on earnings. But I have also heard it's based on earnings and the progress with their Individual Work Plan. Can you tell us a little bit more about what is involved in a timely review?

Cara Caplan: Well, we are not doing them right now. So, let me just say that. But there were persons who failed it several years ago and they still have a failed timely progress flag on their record. So, therefore, those persons are subject to medical CDR review. Although if they are making timely progress, they can then have it switched back, and they just give the information. However, it is based on income -- I mean, it is in the regulations. It is pretty convoluted actually. And there is the first level, second level. I forget the exact amount; there might be eight levels. But it is based on income and/or education. So, for example, if you happen to be in school like in college, and you're taking three classes, let's say, you know, but after a certain amount of time you have to take more classes or you have to be graduating, that type of thing, but it's not based on the IWP at all, it's based on making the progress in employment or education.

Kim Gonzalez: And so, when I have seen that come up on my reports, it will say like GPR, those failed or whatever, is there something that we should be telling our clients to do if they are actively participating with us?

Cara Caplan: Maybe might. She is a lot more familiar with this than I am. I do not know if she -- Katie, are you still on?

Katie Striebinger: Yeah, I am still here. So, the best place to go would be in the Ticket Portal. That will tell you their TPR status and that will tell you why they failed if they failed and what is required. If a person is earning what they should, you need to re-enter. Sorry, I have some background noise. But I would encourage you to go look up your Ticketholders in the Ticket Portal.

Kim Gonzalez: Yes, I have seen them. I have seen that what you are talking about. I just did not know what I should be telling the client to do, to talk to somebody about it to see if they can get it changed if they are actually not working and participating.

Katie Striebinger: So, participating is not the same thing. If you have failed, you must meet different criteria to re-enter. So, it is not that participating means like you are actually working with someone. You have to be meeting the goals of timely progress that you're at. So, I would recommend, I believe the box is — and someone on the chat please correct me — and I believe the box is EN Operations. If you contact that mailbox, they will help you, assist you, and move you on the next one from there if you need to try to help that person re-enter. But it is all the Ticketholder's responsibility. And if they did fail, they should have received a letter in the mail from Social Security letting them know that they did fail. But the Ticket Portal does have the latest information for a Ticketholder on their TPR information.

Cara Caplan: And a lot of people try to re-enter after a medical CDR has been initiated. And once it is initiated, that's it. It must go through. So, my advice is if they are — basically to reiterate what Katie is saying, if they are making timely progress, you want them to try to re-enter immediately before a CDR is pulled. Because once it's pulled, that's it. It does not stop.

Katie Striebinger: Yes, we can only re-enter you effective the day that we approved your request for re-entry. We cannot re-enter someone in the past. So, if you were to send us some proof today, we could re-enter you — excuse me, the Ticketholder, but that Ticketholder's re-entry would not be dated until today's date. So, we cannot re-enter anyone in the past. So, right, if you look on that list and you see that there are failures and you know they actually are working, I would encourage you to help them by encouraging them to re-enter.

Kim Gonzalez: Okay. And on the BPQY where it will say like the next medical review is scheduled, for example, 4 of 2023, how will they know what the date is?

Katie Striebinger: We cannot help you with the medical CDR review date on this call.

Cara Caplan: That just means when it's scheduled but the beneficiary would receive a letter if they were getting a medical CDR review. That is when we receive a lot of re-entries, people get scared. "I've got this letter; they're doing a review but I'm working." And the problem is it is too late. Like that's why Katie is saying we encourage you to go through your list and if people are working and making timely progress, you want to proactively help them re-enter versus waiting until after the field office has started a review.

Kim Gonzalez: And by saying re-enter, what does that mean, like doing a new work plan?

Cara Caplan: No, that means that you send in proof that they are making timely progress, meaning they're working at a certain level, let's say. And then we can fix it where they do not have a failed timely progress anymore. And they are fine and they will not get pulled for medical CDR.

Katie Striebinger: I was going to jump on. You know, it would be to our benefit to, like Cara said, we are not restarting timely progress to be used, but maybe it would be helpful if we send something out to ENs with like a FAQ or just FYIs so ENs have some information about re-entry. I think that is something we could take back so everyone is on the same page, and that your ENs understand that concept. That is something that ENs can do right now even though we are not performing Timely Progress Reviews.

Derek Shields: Thank you, Katie. Thank you, Cara. Good question exchange there. With that, we will go to Nicole one last time to make sure we're covering any hand raise. Any other questions, Nicole?

Nicole Black: Derek, there are no additional questions to be asked at this time.

Derek Shields: Thank you. And it looks like we have a question in the chat. "What if the beneficiary has reported wages, etc., to SSA, what if they see that as they're preparing to begin CDR? Would that be a part of the follow-up guidance that you Cara and Katie were speaking up, try to put a report?"

Cara Caplan: No, reporting it to the field office is not reporting it to us per timely progress. They are two different things.

Katie Striebinger: We're talking about two different CDRs. There is a medical CDR and there is a work CDR. Those are two different CDRs. The question in the chat, it is not really clear which one they are trying to talk about.

Derek Shields: Thank you. With two minutes to go, we will see if we get clarification there. Otherwise, Cara, any final comments based on the exchange that you would like to share as we wrap up?

Cara Caplan: No, but some of it is saying aren't we doing that every month when we submit pay stubs? No. It has to be, a person has failed their Timely Progress Review and they are asking to be reinstated. So, we are not proactively looking to reinstate people. They have to ask for it.

Derek Shields: Thank you. I do see we have a final question that I think has come in. Nicole?

Nicole Black: We have a question from Sandra Abbot. Sandra, go ahead and enable your microphone and ask your question.

Sandra Abbot: Yes. I receive information from a lot of new beneficiaries who are applying or wanting additional information regarding the Ticket to Work Program that they're being told about the EPE phase and they're telling them if they go over that amount that they would lose their benefits, and it's causing some of my beneficiaries when they get to that phase to drop their hours so that they can — or so they won't go over the SGA. And I was wondering if there's anything that can be done, I guess through the help desk or, that's giving this information if they could not express that information. Because I have clients right now who will not — I mean, they have the ability to make good money, but they will not go over the SGA because they were told that.

Cara Caplan: You're saying our help desk or the SSA help desk?

Sandra Abbot: I am not sure which help desk they are calling but I do know the beneficiaries are calling. They are privately calling the help desk, okay, when they are inquiring about Ticket to Work, and they give them an overview of the program. And then when they get to the EPE phase and they tell them, you know, if they go over that amount that they will lose their benefits. And so that they will not — I have at least ten that could do extremely well, but they are so afraid, and we have told them. I have sent them information that their benefits may be suspended but it is not terminated.

Cara Caplan: It is terminated after a certain amount of time but no, it is not terminated right away. That is true.

Sandra Abbot: Right. And it's stunting, it's really stunting their growth, financial growth because they're afraid if they go over the SGA, they're being told — and I don't know exactly, if it's the help desk but I'm taking it that once they receive the information that they are eligible to become or can take part in the Ticket to Work Program, they're given a number. And so, taken as to whatever department that they are sharing this information. And it is not just one person. I have this information or a question from a lot of beneficiaries.

Cara Caplan: So, are you thinking they are giving incorrect information, or they are giving the correct information but they are scaring beneficiaries?

Sandra Abbot: I think they are giving them correct information but they're scaring them to the point that they stunt their own financial growth.

Cara Caplan: Okay. Well, we can take that back and, you know, see exactly how and when it's being presented because it could be that the beneficiary asking about how work affects my benefits.

Sandra Abbot: Okay. Thank you.

Derek Shields: Thank you very much, Sandra, for the question and point, and, Cara, for your time today. We have come to the conclusion of the All EN Call. On behalf of the Ticket to Work team, I'd like to thank you all for attending today. I would also like to thank our presenters, Cara, Katie, and Ana for bringing valuable information for this exchange today. To note, we will be providing a recap of today's call. We also provide the transcript. The first pieces that will be available through will be the slides.

Looking ahead on the next slide, please plan to join the All EN Payments Call on April 25, from 1 to 2 p.m. Eastern Time. And our next All EN Call will be on August 22 at 1 p.m. Eastern Time. Again, if the slide can move forward, please. That All EN call will be on Tuesday, August 22, 2023, at 1 p.m. Eastern Time. We request for you to send your topic and suggestions to us at enoperations@yourtickettowork.ssa.gov.