

Derek Shields: I'd like to welcome you all to today's quarterly All Employment Network Call. My name is Derek Shields, and I will serve as the moderator for today's All EN Call. Before we begin with our agenda and presentations, I would like to review a few logistics. Next slide, please.

I will now review the logistics that we have on the screen to make the most out of today's session. First, please remain muted during the call unless we call upon you during the Q&A. Questions can be asked via the Teams chat or via raised hand, or if you prefer, via telephone. You'll have to unmute and ask those questions live. There is a two-step process involved that's on the screen, and we will remind you of these instructions during our two question-and-answer sessions that we hold today. You can also email us questions at enOperations@yourtickettowork.ssa.gov. Importantly, to access the captions, please use the following link that will be placed in chat, or you can choose to use the live captions in MS Teams under the More Actions menu. Next slide, please.

Today's quarterly call is scheduled for 90 minutes. This is being recorded, and a transcription is also being captured. We will have approximately 60 minutes of presentation time, with the additional time being used for questions and answers. On this slide, we have our agenda today, beginning with welcoming remarks from Social Security, followed by a Ticketholder engagement update, access to the Talent Acquisition Portal, and availability of Microsoft Training. Following that, we will pause for our first Q&A session. Then we'll return to presentations with an update on the Beneficiary Satisfaction Survey, updated WIPA referral process at the Help Line, best practices for reporting work activity, and we'll wrap up with EN updates and some other reminders. And after that, we'll have that Q&A session as we talked about. With that, next slide, please.

I'm now pleased to introduce our first speaker to provide welcoming remarks and updates from the Social Security Administration. It is now my privilege to introduce Mr. Robert Pfaff, the Director of Office Employment Support in Social Security's Office of Research Demonstration and Employment Support. Rob, over to you.

Robert Pfaff: Thank you, Derek, and good afternoon and/or good morning to all of you. Thanks for joining us today. I hope everyone had a pleasant holiday and a safe holiday as well. We want to particularly welcome any new Employment Networks that have joined this call or staff from recently joined organizations. Welcome to the call. We have a lot of information to get through today, so I'm going to cover a couple of topics with you.

So first of all, we have discussed in the past, I know, some concerns have been raised with several Employment Networks about Operations familiarity with the Ticket to Work Program. And, you know, in some instances, a significant lack of knowledge about Ticket to Work and, you know, some of the work incentives as well as employment policies.

So what we've done is — we have some good news on that end. We've reached out to our partners in Operations and wanted to announce a couple things that we are engaged in to help that effort and to help train some of the Field Office staff on some Ticket to Work topics. So the first thing that I'm going to cover are some training initiatives that we currently have in the works with our Office of Learning and in conjunction with Operations. What we've been able to do is leverage some training that's currently in place. And what these are, are training segments that are part of about a 20- or 30-minute montage of topics that the Field Office staff will see periodically. And we've been able to obtain segments within these training video montages, I'll refer to them as several minutes to cover topics that are key to the Ticket Program and will be helpful for Operations to be familiarized with what we are doing.

So for example, the first topic that we're currently working with DCHR, which is our Human Resources and Office of Learning, to develop is on the Benefits Planning Query. I know a lot of folks have come to us and indicated that BPQY familiarity varies quite a bit and can be very delayed. And so, what we're hoping to do is take several minutes of an upcoming training segment that's going to occur within the next couple of weeks, is to talk about the BPQY, give a high-level overview of what that is, talk about the importance that the BPQY plays in the Ticket to Work Program and for individuals going back to work in order for them to understand how work and earnings impact their benefits. So that's going to be the first topic. That's in the works right now. Scripts have been written for that, and we hope to have that before the beginning of the next new year.

Another thing I want to talk about briefly and let me take a step back. So that training goes to Operations staff, and that means that will be Field Office staff. It'll be teleservice center staff, so folks taking calls on the phone, and payment center staff as well. So it's going to hit a broad audience, and so that message will go out universally across the Field Office folks. We will also follow up, and we plan to hold several segments in the future about topics of interest that we know are creating some confusion and problems in regard to the Ticket to Work Program. So that's the first topic I wanted to share with you.

The second topic was in reference to a newsletter that we're putting together. Again, this is Operations focused. What this will be is a widely distributed newsletter, which we call Your Ticket to Work — I'm sorry, Your Ticket to the Red Book. So it's a play on words there, and this will cover an overview of the Ticket to Work Program, and the first issue is about to go out shortly in broad distribution, and will cover in broadly the Ticket to Work Program and information pertaining to the SSA call center and the Choose Work website to serve as a resource for Operations staff so that they can hopefully retain that information. And for the clients that are coming in and talking to them, they can make that referral to the website and to the call center as well as giving beneficiaries an understanding of what the Red Book is and that information as well and links to the Red Book and so forth. So those are two things I want to talk about. Also, we are adding quarterly calls with Area Work Incentives Coordinators, and this will also help us discuss topics of interest to the AWICs and for us to get input from them as well. So

to have that touch point on a quarterly basis has been very helpful, and we are in development right now with developing an agenda for that first call, which should be occurring within the next several weeks. So again, three areas where we are making that touch point with Operations staff, so more to come on that.

Two things of interest I want to share with you, and that is two hearings which have occurred recently. We're going to share those links with you. First of all, there was the Senate confirmation hearing for Martin O'Malley, who's been nominated to become the next Commissioner of Social Security. We're going to provide that link for you that's on YouTube so that you can watch that and get a sense of Governor O'Malley's vision for the agency and how he responded to questions he received during the hearing as well.

Second issue I wanted to share with you was a hearing on overpayments. This occurred in the House Ways and Means Social Security Subcommittee. Again, we're sharing that link with you so that you can watch that and glean information that's been covered during that hearing. I know that's been of high interest, and again, a lot of concerns expressed to us about overpayments that have been made. So those are two, we think, valuable links. Please see them in the slides or reach out to us, and we'll gladly send those over to you as well. So that's everything I have, a little lengthy today, apologies for that. Right now, I will turn it over to Derek, who will take us to our next speaker.

Derek Shields: Thank you very much, Rob, for your remarks and sharing these two links. If you're on the telephone, just to make mention, there's two links in chat, they're also in the slides, and we'll share those links to Martin O'Malley's Senate confirmation hearing and also the second link to the SSA hearing on overpayments. That link, just a note, scroll to the five-minute and 52-second mark to access that content that Rob is recommending you check out. So thanks again, Rob, for those remarks, and now we'll move forward with our next presentation, focused on Ticketholder engagement update. Joining us today to cover this topic is Patrice McLean, a Senior Advisor in the Office of Employment Support. Over to you, Patrice.

Patrice McLean: Good afternoon, everyone. On April 5, 2023, we released a Ticketholder engagement message to all Employment Networks. We mentioned that we'd identified instances where some ENs are not in direct contact with their Ticketholders over extended periods of time, sometimes upwards of two to three years.

We've also conducted additional analysis and identified many Tickets assigned to ENs that have not generated a payment in extended periods of time, such as two to three years. Per the TPA, one of the criteria that SSA uses for EN evaluation is employment results for Ticketholders, including job placement and retention rates, achievement of timely progress benchmarks, and ultimately, achievement of financial independence, which we define as exiting the roles with earnings at or above the substantial gainful activity level. In the message we sent in April, we recommended that ENs engage those Ticketholders who are not actively engaged, who are not actively working towards self-sufficiency, and determine whether new goals,

services, and supports are appropriate, and revise the IWP to reflect those changes, or determine if the Ticketholder is not working towards self-sufficiency and no longer wants to work toward employment goals. And if that was the case, we mentioned in the message that that Ticket should be unassigned. We've continued our analysis and found that there are still many Tickets assigned with no payments within the last three years, and many instances where ENs are not engaging with their Ticketholders. So we're going to begin what we call the dormant Ticket initiative, where we'll reach out to ENs that have a lot of Tickets assigned where the EN has not received a payment in at least three years. No payment in three years may be an indication that the Ticketholders are either not working or they're working and earning below the minimum threshold to generate a payment to the EN.

These Ticketholders are receiving Continuing Disability Review protection without progressing towards self-sufficiency. We'll be in touch with the ENs that meet this criteria to discuss your business processes for tracking your Ticketholder's progress, and we may require corrective action if we identify any deficiencies. We're going to contact these ENs and require them to do a few things. We'll require them to contact their Ticketholders to determine if they intend to continue participating in the program and are able and interested in working. If so, we'll have the EN work with the Ticketholder to develop new goals, services, and supports and revise the Ticketholder IWPs to reflect those changes. We'll also require the EN to track those Ticketholders who indicate that they want to continue in the program and return to work to determine when these individuals start progressing toward employment, when they're employed, and when they've generated a payment to the EN, when their earnings have generated a payment to the EN.

We'll also ask that the EN unassign Ticketholders that they choose to discontinue working with or if the Ticketholder indicates that they are unable to or uninterested in returning to work. And we'll also ask the EN to unassign any Ticketholders who express an interest in working or continuing in the program but do not make progress in a reasonable amount of time. For those Tickets, the amount of time that it takes for a Ticketholder to earn what will generate a payment to the EN is largely based on the needs of the Ticketholder. However, SSA is going to review these dormant Tickets periodically to determine if any progress has been made. If after any time there's still no progress, SSA will unassign the Ticket and inform the EN. It's very important that the Tickets assigned to each EN are making progress toward employment and self-sufficiency. While we'll be in touch with a number of ENs that have a large percentage of Tickets that have not generated a payment, it is imperative that all ENs look over their list of assigned Tickets and take necessary action on those assigned Tickets to ensure that they're making progress and to ensure that you're actively engaging each of your Ticketholders. We want to remind ENs that for Ticketholder engagement purposes, we require two-way communication with the Ticketholder. Please refer to Part 3, Section 4 of the TPA for what two-way communication means for both the initial job acquisition phase and the ongoing support phase. In addition to two-way communication, if a Ticketholder is not meeting their goals as outlined in their IWP, we'll ask that all ENs discuss and document the following.

If the Ticketholder goals are still appropriate, then determine if they need additional services or supports to achieve those goals and appropriately revise their IWP. If the Ticketholder needs new goals, determine if their goals are appropriate based on the guidance in Part 3, Section 4A2 of the TPA and revise the IWP as needed. Lastly, if the Ticketholder no longer wants to work towards their established goals or they no longer want to revise their goals and they're not working towards self-sufficiency, then the EN should unassign those Tickets. As a reminder, in January 2024, the Services and Supports Review will include confirming compliance to the Ticketholder engagement guidelines in the TPA. So it's important that each EN reviews the guidelines and review your Ticket assignment to make sure that there's two-way communication, demonstrated progress towards self-sufficiency, and engagement with your Ticketholders at all times. We will send the message out over the next few weeks so that you'll have this information in writing and know what we're asking everyone to do. With this, I will turn over to Derek.

Derek Shields: Patrice, thank you very much for the Ticketholder engagement updates and we will welcome you back in a few minutes for our first Q&A. So there are some comments in chat. If you have questions that you'd like answered, we'll have Rob and Patrice back with us in a little bit along with our next presenter. And with that, if we could forward to the next slide, I would now like to introduce Mike Corso, the President of Disabled Person Inc. Mike rejoins our quarterly EN Call to review how to access the Abilities to Careers technical virtual learning platform along with the Talent Acquisition Portal or TAP. Mike, thanks so much for being back with us today and it is now over to you for your presentation.

Mike Corso: Yeah, thank you, Derek. I appreciate it. Thank you, Rob and SSA for allowing me to give this information to the ENs. We just wanted to invite - Disabled Person Inc. and the Council of State Administrators of Vocational Rehabilitation want to invite all the ENs to participate in the Talent Acquisition Portal and I'll do that slide going forward. I also wanted to inform you about the Abilities to Careers Technical Virtual Learning Platform, which launched last September. Could you push the slide forward, please? Yeah, so the ACTVLP, which is just short for Abilities to Careers Technical Virtual Learning Platform, is a video-based instructive-led and supported learning environment. We're partnering with CSAVR, the National Employment Team, and Skillsoft. Please, next slide. Next slide, please.

Yeah, so we offer, it's on-demand so that the consumers, beneficiaries could take courses whenever. It's instructive led, it's supported, the learning is technology and business. It prepares individuals to sit for IT certifications and business certifications. The learning platform, excuse me, is DisabledPerson.Precipio.com. Next slide, please.

There is a cost to it. It's \$500 for the year and that's access to learning the complete library of courses. The idea here is to have the individuals take multiple courses, stack credentials, and so that they can build a career and get to competitive integrative employment. That's the whole purpose of it. We offer badges and certificates of completion as well. Next slide, please.

We have a full range of IT certifications. We could take somebody from complete novice to full-stack developer and a wide range of business certifications and courses from accounting to administrative assistant, executive assistant, office manager, sales, and more. Next slide, please.

If you have an interest in hearing about it, I could send you a video about it. We have brochures. You could just reach out to me at Mike@DisabledPerson.com or give me a call at 760-420-1269. Next slide, please.

Now about the Talent Acquisition Portal. Many of you have heard of the Talent Acquisition Portal. We currently have, I think, it's like 44 to 45 ENs participating in the portal with their beneficiaries. We welcome every and all ENs. We do not charge for the ENs to participate. If you have an interest, just let me know. Currently, there's over 400,000 jobs streaming across the U.S., and we have over 32,000 active candidates. These candidates come from State Departments of Vocation and Rehabilitation, from the Veterans Affairs, the Veterans and Readiness Employment Agency, and from the Employment Networks as well as some community partnerships. Next slide, please.

So again, we offer the Talent Acquisition Portal as a free public service to the Employment Networks. If you're interested, please send me an email, mike@disabledperson.com. What I would need from you is just the EN's name, the lead individual, and the email address, and I'll set up your agency within the portal. We have training right on the site, and I can also send you a video demonstration, a 32-minute video demonstration, how to utilize the portal. So if you have any questions, just feel free to contact me again, mike@disabledperson.com. My phone number is 760-420-1269. Thank you. I appreciate the opportunity to offer the services to you. Back to you, Derek.

Derek Shields: Thank you, Mike, for your presentation and offerings there for ENs that are interested. We did have a question there, so I'm just going to repeat it one more time. Mike's contact information is mike@disabledperson.com, and the telephone number is 760-420-1269. With that, we now are going to move to our first Q&A session, where we have Mike remaining with us, and we also have access to Rob and Patrice for their remarks and other questions from ENs. On the screen, we have some reminders for you about how to engage with questions over the telephone. Please raise your hand by dialing star 5, and you will be unmuted by the facilitator. It's a two-step process. After that happens, we'll call on you. You then need to press star 6 to unmute yourself. Via MS Teams, you can enter your question into chat, as many people have had comments and questions already, or you could raise your hand, and your mic will be unmuted by the facilitator. To begin, let's go to raise hands, Katherine. I believe we have a raised hand. If you could call on that person, please.

Katherine Jett: Hi, Derek. Thank you. Lori Popejoy, you are unmuted, please. Just click your mic to unmute and ask your question, please.

Audience Member: Hi. Can you hear me?

Katherine Jett: Yes, ma'am.

Lori Popejoy: Thank you for taking my call. I'm not trying to sound adversarial. I am having a lot of problems with some of our local offices. Every one of my clients is having some request or some issue —improperly suspended Medicare. It just goes on and on right now, and I cannot get through. On the local Tacoma office, they've even told me on the phone they can't help me or they're too busy. They don't have time for this. I want to know, where do I go when I cannot get answers and they are uncooperative?

Derek Shields: Thanks, Lori, for the question. Rob's coming on. Rob, go ahead and unmute if you have a response.

Robert Pfaff: So if you are having problems with Field Office staff, obviously to the extent you're staying, what we would ask is that you send us some specifics about what's happening. In other words, what is the issue and what is the address of the Field Office where this is occurring, and please try to be as detailed as possible. If it's multiple instances, try to list everything that you possibly can, and then send that to us. I think the best communication link is our EN mailbox, where that can be forwarded over to us. Derek, correct me if I'm wrong or anybody else that's on the call.

Derek Shields: That's great. Well, that's correct, EN service, and we can place that into chat momentarily.

Lori Popejoy: Thank you, and thank you, Robert, too. This is very frustrating at this point.

Robert Pfaff: Yeah. I apologize for the issues. What I can say also is what we do at that point is forward those to our Operations contact that's in headquarters. So we don't reach out to the Field Office directly or go to the region. We let Operations that's at headquarters have that communication with them.

Derek Shields: Excellent. Thank you, Rob, and thank you, Lori, for the question. Katherine, I'll just check in with you. Any other hands up at the moment, please?

Katherine Jett: Hi, Derek. No, we have no more raised hands at this time.

Derek Shields: Okay. Again, if you have questions for Mike, Rob, and/or Patrice and want to ask those questions live, just raise your hand or use star 5 to begin the process via telephone. Let's check in with Ana on comments and questions in chat. Ana, there's been a variety of activity. Do you have a question that you could pull for the team today?

Ana Morales: Yes. Good afternoon, everybody. It seems that there are a couple of questions or, well, obviously, people need clarifications on Timely Progress Reviews. But we have one that the comment is, I thought a Ticketholder has to make Timely Progress Review via earning above the Trial Work Level or SGA to be exempt from CDRs. And connected with that, we have — if I can just add, connected with that question, we have others of people asking about a school and basically the different steps to achieve or pass TPA reviews.

Patrice McLean: Thank you so much for that, Ana. I do want to make sure that we're clear. Per the TPA, yes, we are looking for, you know, achievement of timely progress benchmarks. But what I'm discussing is a different initiative, not Timely Progress Reviews. As I mentioned, we conducted some analysis and saw that ENs were not actively engaging their Ticketholders, and then we also saw that they weren't receiving payments, which is an indication that there may not be any traction with the ENs' work with that Ticketholder. So I'm not discussing timely progress as a review. We're talking about whether or not ENs are working with their Ticketholders, engaging with their Ticketholders to help them to return to work and self-sufficiency. So there's no change to timely progress.

The rules are still the same, but that's not what we're discussing today. We're discussing Ticketholder engagement. Are you in touch with your Ticketholders? Are you contacting them as required per the TPA in the initial job acquisition phase and the ongoing support phase? Are you contacting them monthly and quarterly? And are you documenting those conversations? Is there two-way communication? And are you helping those individuals to get back to work? So we're not discussing timely progress. We're talking about making progress toward employment in a timely fashion and making sure that there's some demonstration of that when we look at the services and reports reviews. There shouldn't be zero contact for two and three years. And if there's been no payment for two and three years, then we'd want to know what's happening there. And so we're asking all ENs, take a look at all of the Ticketholders that are assigned to you and make sure that you're actively engaging those individuals, even if they are in some sort of educational program. Are you engaging with them? Are you providing services and supports? And are you helping them to progress toward self-sufficiency?

Derek Shields: Thank you, Patrice. This is Derek. Just a follow-up there. You mentioned at the end of your remarks that you'll be providing this in a written format in the near future. Could you just repeat what you said again to make sure everyone knows what's coming?

Patrice McLean: Yes. We're going to send a note pretty much containing this information to all ENs. So we're going to be sending this information in writing so that you're aware of what we're expecting everyone to do, which, as I mentioned, is to take a look at the Tickets assigned to you. We understand that sometimes you might have a Ticketholder that was assigned a while back and you've kind of fallen out of touch. We want to make sure that you're back in touch with those individuals and having a conversation with regard to whether or not you're going to continue to work with them. Is there a need to revise their goals, revise the services and supports that you provide to them, and how will you do that to help them to achieve self-

sufficiency? And yes, we're going to send this out via email to all ENs. We're going to work with a specific subset of ENs that have a high percentage of Tickets that have had no payments in at least three years. So we'll send a note to those particular ENs as well.

Derek Shields: Excellent. Thank you very much. We do have some more hand raises, and let's go to those. We'll try to get these three in before we move on with the next section of our presentations. Catherine, go ahead.

Katherine Jett: Hi. Caller 0921, you have access to your mic. If you'll press star 6 to unmute and ask your question, please. Okay. Caller 0921, you have access to your mic. Press star 6, and that will unmute you and ask your question.

Derek Shields: This is Derek. It looks like that hand was dropped right as you gave that instruction, so let's go to the next caller.

Katherine Jett: Okay. Thank you, Derek. Paula, you have access to your mic now. Just go ahead and unmute by clicking your microphone. Hi, Paula. Just click your microphone up top and unmute and ask your question. Okay. While you're looking for the mute, Michelle, you are unmuted. Michelle McKnight, just click your mic to unmute and ask your question, please.

Michelle McKnight: Hi there. Can you hear me?

Katherine Jett: Sure can. Thank you.

Michelle McKnight: So I have a question that probably is better taken offline just because we're an employer EN and there aren't a lot of other employer ENs. And whenever we have an employee that separates so they're no longer our employee, I obviously unassign the Ticket. But when we have certain instances and when we're working with people who have disabilities, this happens kind of often that these folks go out on a leave of absence, typically a medical leave of absence, due to them not being physically able to fulfill the duties of their job. Those folks are protected from any action by their employer. So for instance, if I go and unassign their Ticket and they're on a leave of absence, that can look like something aggressive to someone who is on a protected leave of absence and that could instigate some kind of legal inquiries by our employees.

So when we have someone who's on a leave of absence and we have people who are on leave of absence for over a year at a time, we do not unassign the Ticket. And I have a feeling that part of this happening had to do with our recent services and supports review because one of the folks that was chosen for audit is currently on a leave of absence due to their disability, and we have not unassigned that Ticket, even though they're not meeting the timely progress guidelines, nor are they even physically working at this point. So I just wanted to bring that to light that that could be part of the reason for some folks, especially our Employment Network, just because we are an employer and there are certain things that our HR department has

advised us against doing because it can be interpreted as an aggressive act by legal counsel or even just our employee.

Patrice McLean: Thank you for that, Michelle. And it is a very specific circumstance, but we'll take that back because you do make a good point. We'd have to take that back and provide you with specific guidance on what you should do, if anything different. So thank you for that.

Audience Member: Thank you.

Derek Shields: Thank you. Thanks, Michelle. Katherine, let's see if we can get one more question in here before we proceed.

Katherine Jett: Okay. Sounds great, Derek. Paula, you are unmuted if you want to ask your question after you unmute. Okay.

Derek Shields: I noticed Paula mentioned in the chat earlier she was having a challenge unmuting, as was another caller. If you are unable to ask your question live because of this barrier, we do encourage you to place it in the chat in the meantime. Let's try to move to the next caller.

Katherine Jett: Okay. All right. We have caller 0921. If you'll press star six to unmute, and you can ask a question. Okay. We'll go to the next caller, Missy Crawford-Smith. You are unmuted. If you'll click the microphone to unmute and ask your question, please.

Missy Crawford-Smith: Hi. I had a quick question about the participants that haven't been paid on for three years. You mentioned something to do with the IWP, and I was unsure if you meant we needed to do an addendum to the IWP or if these people need to be unassigned and reassigned with a new IWP.

Patrice McLean: That's a good question. So what we're asking is for ENs to take a look at those Ticketholders with whom you haven't been in contact or if you haven't received a payment and to discuss, you know, do you still want to work? Can we still work together toward you becoming self-sufficient? During that conversation, it might be helpful to ask if their goals are still the same. So if there's been a change to their goals, and if there's going to be a change to the services that you'll be providing to that individual based on new goals, those are things that we'd want you to change in the IWP. So the IWP shouldn't reflect services that are different from the services that you're now going to provide. So if in having conversations with those dormant Ticketholders, we would want you to determine if there are changes that are necessary to the IWP. If the goals are still the same and the services are still the same, then, of course, you wouldn't need a change. But if they are different, especially now that some time has elapsed, then we'd want you to make those changes. And once, you know, you have your next services and supports review, we'd want to see what's current.

Audience Member: And we would make that change on an addendum?

Patrice McLean: Yes, you'd make that change on an addendum. And I will just double check with — can someone confirm, someone from SSA or TPM, that would be a change you'd make on the addendum, right?

Mary Kay: This is Mary Kay. Patrice, yeah, the EN and Ticketholder would be documented on an amendment. Make sure that it's signed and dated by both the Ticketholder and the EN.

Audience Member: Thank you.

Patrice McLean: Thank you, Mary Kay.

Derek Shields: Thank you very much for these questions and, Patrice, for the answer and Mary Kay as well. At this time, we're moving through our 90 minutes quickly, and I'm going to ask those that have questions, you can leave your hand raised. We'll come back in our final session for Q&As to try to unmute you and have your questions asked. And please keep them coming in, hand raised or in chat. We will be back in a moment. At this time, I'd like to move forward to the next slide, please, and thanking Rob, Patrice, and Mike Corso for their content.

We're now going to move forward to our next topic, focused on the Beneficiary Satisfaction Survey. And joining us today to cover this topic is Mike Anzick. Mike is a Senior Advisor in the Office of Employment Support at the Social Security Administration. Mike, you're now on camera, and over to you, please.

Mike Anzick: Thank you, Derek. I'm glad to be here. If you go to this next slide, I'm glad to be here to talk about our Beneficiary Satisfaction Survey. I guess a month or two ago I was on one of these calls talking about that we were planning in the future to launch this survey. Well, now it is in the field. And it is part of the Ticket to Work Act in 1999, that said that SSA is required to do periodic surveys of consumer satisfaction with the Ticket Program. So it's been five-plus years since we did our last one, so we're in the field again. And you should have been alerted in an email blast about the survey, which we launched on November 13th. And on the 13th, our TPM subcontractor, Westat, is a research organization. They mailed the first wave of 10,000 survey invitations. And just note that not everyone who's a Ticketholder will be included in the survey or invited to participate in the survey. It's just those folks that we've selected as a sample that will be representative of the full population. So again, we've mailed the first 10,000 invitation letters, and we're going to be doing that, new waves of 10,000 letters every one to two weeks. And, again, randomly selected. So we can talk more about that.

Westat, our subcontractor, will also be sending reminder letters to those who are not responding right away. And in the letter that the invitees receive, there'll be a link to the online survey with a passcode to be able to activate their particular survey. Their name will pop up in there. Also in the letter is a phone number to ask questions of Westat, or they can also be told that they can

take the survey online. They can call Westat, set up an appointment, do it online. And there's accessible options for those people who are deaf, hard of hearing, or with a speech impairment. We can use a 711 relay service for them. So our goal is to have 5,000 completed surveys. To get to that point, our survey may be in the field until mid to late January, depending on our response rate. Ideally, it would be completed in December. But if we're not getting the uptick in responses, we'll keep it open and through. The last set of invitations will go out the middle of January and the fielding period will be over at the end of January. Those people receiving the invitations, again, can call Westat, the Ticket Help Line, Social Security's 800 number, or go to our Choose Work site, and there are FAQs there. ENs, like other groups we've worked with, are part of our outreach efforts.

The blast that you received also went to WIPAs, PABSSs, other disability advocates, and also to Ticket beneficiaries. So we sent GovDelivery messages, social media, websites, et cetera. We really want to let people know that this survey is out there. And what are we asking you to do as an EN? We really want to have you help us promote the survey. In the blast that you received, there is a link to a media toolkit with sample Facebook messages, Twitter messages, along with FAQs in case you get questions. When your clients call, please encourage them to complete the survey and assure them that it's legitimate. We don't want them to think it's a scam, and that their privacy will be ensured. We're only going to have aggregated data. It's a voluntary survey. If they decide not to do it, their benefits will not be affected, and any of the responses they give will not affect their benefits. And it will not identify any EN specifically either. Again, it will be all aggregated. And not every EN will have some of their beneficiaries included in the survey, depending on how the randomly sampled beneficiaries came out. Let them know that we want to learn about the services they've used, any personal barriers they have, like transportation or child care, and we want to know about their work and their earnings, demographic characteristics.

All of this will help us to learn what they need, and it will allow us to enhance the program for them. So the survey will be in the field, as I said, at the latest the end of January. We will have a final report the end of February, early March, and that will be available when it's completed with all of you. So you can see the aggregated big-picture findings that we have as we surveyed hopefully 5,000 beneficiaries or more completed by that period. So that's what I have at this moment. And, again, really encourage the beneficiaries because their voice needs to be heard in this. It's not something we do every year, and it's important that we gather this as we go along. So thank you, Derek. I'll send it back to you, and I'll answer any other questions that come up later on.

Derek Shields: Thank you very much, Mike. Appreciate the update on the Beneficiary Satisfaction Survey. If we could go to the next slide, please.

I'm now pleased to welcome Chandra McLaughlin to our call. Chandra is a WIPA and PABSS Project Officer with Social Security's Office of Employment Support. We thank you for being with us today and look forward to your presentation. Over to you.

Chandra McLaughlin: Thanks, Derek. As most of you may know, the Work Incentives Planning and Assistance, or WIPA, program provides free and confidential individualized benefits counseling to disabled social security and supplemental security income recipients. You may also be familiar with the Ticket to Work Help Line, or Help Line, that our contractor, Cognosante, operates for Social Security. In addition to providing information and referral for the Ticket to Work Program, the Help Line also provides general information about Social Security Work Incentives and refers beneficiaries to the WIPA program for counseling. The Help Line provides almost 80% of the referrals for beneficiaries that our WIPA program serve.

Due to funding limitations, many WIPA programs have had challenges serving all the beneficiaries that are seeking services. They have had to create waiting lists for services for people who are considering but not yet actively engaging in work or self-employment. We are concerned that this delays beneficiaries that are in the early stages of the back-to-work process from receiving the general information they need to make informed decisions about work. To address this, we have changed the requirements for referrals to WIPA programs, effective with Monday, December 11, 2023. Currently, the Help Line refers people for services who do not yet have a job offer, youth between ages 18 and 25, and beneficiaries who have had an interview or have scheduled an interview for a job. We will no longer have the Help Line refer beneficiaries at these early stages of the back-to-work process.

After December 11, 2023, the Help Line will only refer adult beneficiaries who are already working or who have a job offer. They will also refer youth who receive benefits under the childhood definition of disability and are not yet eligible for the Ticket to Work Program. To serve these callers, we have enhanced the scripts the Help Line will use to provide more general information with a prompt for them to call back when they are working or have a job offer pending. This change only affects referrals from the Help Line. It does not change any referral agreements your programs may have with WIPA programs. We simply want to ensure that beneficiaries who most need WIPA's intensive services can get these services sooner and that beneficiaries who are not yet working can get answers to their questions without waiting for WIPA programs to have the capacity to serve them. I want you to know, again, this only refers to the process for referring directly from the Help Line. This does not change any agreements ENs may have with the WIPAs. Remember, we are also enhancing the scripts at the Help Line so that our agents can provide work incentive information and answer questions for those who are not yet working and will encourage them to call back once their circumstances change and they are working. If you have additional questions, please email enservice@ssa.gov.

That's all I have, and I'll now pass it to Charles Killen with our Office of Research Demonstration and Employment Support Policy and Innovation team to discuss the Extended Period of Eligibility, 36-month re-entitlement period. Charles?

Charles Killen: Thank you. I appreciate that. So we were asked to bring a topic that might be of some interest to some of you and I'll be happy to answer some questions when we're through

here. So the meat of the discussion is going to be on the Extended Period of Eligibility and the 36-month re-entitlement period. Next slide, please.

In order to get to that, though, we want to provide a little bit of a reminder to some or a review of the Trial Work Period, the meaning of Substantial Gainful Activity, and we'll talk about the Extended Period of Eligibility. We also wanted to touch on the concepts of unsuccessful work attempt and averaging of earnings, what the meaning and definition of cessation month and grace period are and when they occur, and then just a little slide at the end here. We're going to be talking in a future call about expedited reinstatement. That would be the step after all of this stuff occurs. So just a little bit of a slide to tease you for the next call. Next slide, please.

So just as a reminder, like I said, a Trial Work Period. We have a reference here on all the slides for our POMs if you wanted to take a note of that when you look through the presentation. But as a reminder, the Trial Work Period allows SSDI beneficiaries time to test their ability to work. It's nine months, and those nine months are not necessarily consecutive, and those nine months occur during a rolling 60-month period. Full SSDI benefits continue regardless of their earnings during the Trial Work Period, and in 2024, months with \$1,110 in gross earnings or more than 80 hours of self-employment work are considered Trial Work Period months. Now, the Trial Work Period cannot begin before the month of entitlement or the month of filing, whichever is later. So that's just a reminder of what the Trial Work Period is. And next slide, please.

And we wanted to remind you what substantial gainful activity is. Again, there's a POMs reference there for you. The literal definition of it is that SGA means the performance of significant physical and/or mental activities in work for pay or profit or in a work of a type generally performed for pay or profit, regardless of the legality of the work. So more specifically, if the impairment is anything other than blindness, earnings in 2024 average over \$1,550 a month generally demonstrate SGA. The SGA amount in 2024 for blind individuals is \$2,590. Now, SSI only uses SGA as a measure of work during initial claims. So as you know, figuring out SSI payment doesn't have anything to do with SGA. Only SGA is used during initial claims for SSI beneficiaries. However, SSDI uses SGA throughout the life of the claim, both as a measure of work during initial claims and for continuing payment after the Trial Work Period. Before we determine whether something is SGA or meets the SGA threshold, we exclude non-wage earnings such as sick pay, vacation pay, et cetera. Next slide, please.

So now that we have a reminder of what the Trial Work Period is and what SGA means, we want to talk about the Extended Period of Eligibility, and more specifically the re-entitlement period and how they are a little bit different but often confused together. So again, the POMs reference is there for you. The EPE begins the month after the Trial Work Period ends, even if the individual is not working in that month. So the beginning month of the Trial Work Period, the Extended Period of Eligibility is always the month after the month the Trial Work Period ends. Now, the first 36 consecutive months of the Extended Period of Eligibility is the re-entitlement period. During the re-entitlement period, if work or monthly earnings are below SGA, benefits

are payable. If work or monthly earnings are above SGA, benefits are suspended. So we know when it begins. When does the EPE end? The EPE is going to end with the later of the month before the first month of SGA earnings after the re-entitlement period or the second month after the month of disability cessation due to SGA. Another important point about the EPE, just as a reminder, SSI beneficiaries don't have a Trial Work Period. They don't have an Extended Period of Eligibility. So unless they're a concurrent beneficiary, these terms wouldn't be used with an SSI beneficiary. Next slide, please.

So with regard to the Extended Period of Eligibility, we want to talk about the cessation month and the grace period. Now, the cessation month is the first month of work or monthly earnings that exceed SGA after the end of the Trial Work Period. So remember, EPE started with the first month after the end of the Trial Work Period. So the EPE is going to continue, and during those first 36 months, we're waiting to see if and when SGA occurs. And if we determine that SGA has occurred the first month after the Trial Work Period or the first month during the EPE that earnings exceed SGA, that is going to be the cessation month. The grace period are the two months immediately following the cessation month. So during those three months, regardless of the amount of earnings, the individual is going to get their payment. Following the grace period, then the benefits will either be suspended or terminated if the beneficiary earns SGA outside of the 36-month EPE reinstatement period.

I'll say that again. So the first 36 months is kind of an in-and-out period. The first time they get SGA during the Extended Period of Eligibility in the first 36 months, we're going to call that the cessation month. They're going to get benefits for that month and the two following months. Now, if they're still within the reinstatement period, the 36 months, then if their earnings fall below SGA, we can reinstate their benefits. And then if their earnings go, again, above SGA during the reinstatement period, we would suspend those benefits. We wouldn't consider terminating the period of disability until they're outside of that 36-month Extended Period of Eligibility and have earned above the SGA threshold for the given year. Next slide, please.

We wanted to talk about the unsuccessful work attempt and average earnings, which will be our next slide topic, because these are things that we can use during the EPE reinstatement period, the 36-month reinstatement period, to basically avoid a cessation month. So these are concepts that we can use to look at earnings in a little bit different way to see if we can avoid a cessation month for an individual. So an unsuccessful work attempt is an effort to do work in either employment or self-employment, which stops or reduces to below the SGA level after a short time. It's six months, within six months, and it has to be because of the impairment or because special conditions related to the impairment that were needed to help the individual work were removed. So again, what we're doing here is an individual might be working at above SGA levels, but because of their impairment, they have to stop working within six months. And we would review that and make sure whether or not that work attempt could be considered unsuccessful. If so, then we wouldn't post a cessation month to that individual. And the next slide, please.

With regard to averaging earnings, a technician may average earnings when their monthly countable earnings fluctuate above and below the SGA earnings thresholds. Now, evaluating SGA as part of the initial claims process would be a time when a technician may average the earnings or when determining if disability ceases due to work activity in a Work Continuing Disability Review. So as I just said, during the 36-month re-entitlement period, we would look at earnings and average them to see if the earnings average above SGA before we would make a cessation determination. Now, there are times when a technician would not use average earnings. They would not average earnings during the Trial Work Period service months. Trial Work Period months could be included in an averaging period to determine SGA activity after the Trial Work Period is over.

So if it's a continuous period of work, we may include some of those months in to get a better average during the Extended Period of Eligibility. But what we're saying here is that Trial Work Period service months, we're going to look at the gross earnings and determine whether or not they're above the Trial Work Period threshold. There is no averaging going on when we determine whether a Trial Work Period month was used. A technician will not use averaging when determining payment months during the EPE after a cessation due to work activity has occurred. Remember, I said we use this to avoid a cessation in essence. So once we determine that SGA has occurred, we're going to look strictly at the gross earnings after any deductions to determine whether or not the individual was SGA after that cessation. And also, payment months during the Initial Reinstatement Period, or IRP in Expedited Reinstatement cases, is a situation when a technician would not use average earnings. So we're not using that concept of averaging when determining SGA decisions. Next slide, please.

So again, after the EPE, we have Expedited Reinstatement. We're going to cover this in a lot more detail in a future call, but I wanted to just let you know what happens after the EPE because there's an additional safety net that I'm sure a lot of you are aware of and you have some questions on, and we'll be talking again about this in more detail. But an EXR is the safety net when cash benefits end because of their work. So we've terminated their period of disability because of work activity. If SGA-level work ends because of a disability, we may be able to restart their benefits right away if the individual is unable or becomes unable to perform SGA in the month of application, if the disability is the same as or related to the prior disability, and the request is made within five years of when benefits end. So how does EXR help? The EXR provision allows up to six months of temporary cash benefits while we conduct a medical review to decide if we can reinstate benefits, and they may also be eligible for Medicare or Medicaid during this provisional benefit period. So again, we have all of what's going on in the initial disability period, and once that terminates, we have an additional safety net called the expedited reinstatement. So again, I'll field any of your calls today, or if others come through, we can always answer them after the fact as well. Thank you for your time. Derek?

Derek Shields: Charles, thank you very much for your presentation and focus on the EPE and re-entitlement period. We'll have you back, as you mentioned, in a little bit for our Q&A session. We now are moving forward to our final presentation today. I'm pleased to introduce Erinn

Wiedman, Social Insurance Specialist in the Office of Employment Support, for her EN updates and reminders. Erin?

Erinn Wiedman: Hi, all. So as the beginning of the new year approaches, I'm sure you all are eagerly awaiting the start of the Annual Performance Outcome Report, or APOR, collection period. So just to go over a couple important things to note about the upcoming APOR, your EN signatory authority will receive the link to complete the APOR by email towards the end of January. As always, we will post the APOR survey questions for review, an FAQ document, and some other materials to aid you in completing the APOR. The Ticket Program Manager will also host an APOR process review session to ensure that you all are able to complete the APOR timely and accurately. Last year, as part of the APOR, ENs were asked to submit benefits counseling certifications, work-from-home requests, and Partnership Plus agreements, if applicable. For the upcoming APOR, ENs will not be asked to provide any of that documentation, as they are now being collected during your Annual Services and Supports Review. So more information regarding completing the APOR will be sent out closer to the start of the collection period. And that's all that I have for you guys today. So back to you, Derek.

Derek Shields: Thanks so much, Erinn. Appreciate those updates and advance notice of what's around the corner with the APOR. If we go to the next slide, please.

So we are going to now begin our second Q&A session, and there's been a good amount of activity in chat along with some hands that have been raised. So appreciate that. If we can go forward one more slide. We just have some reminders out there. If you're interested and you're dialing in, use star 5. We'll unmute you, and then use star 6 to unmute yourself. You can raise a hand in MS Teams. And if you'd like, you can use our e-mail address at enOperations@yourtickettowork.ssa.gov. And with that, I know we have some hand raises. Katherine, let's go over to you first to see if we can get any of those folks.

Katherine Jett: Hi, Derek. Yes, we have our first caller via the phone. Caller with the last four digits, 0921. You're unmuted. If you'd like to press star 6 to unmute and ask your question. Okay. We'll go next to Lori Popejoy. You are unmuted, Lori. Please unmute and ask your question.

Lori Popejoy: Thank you. Can you hear me?

Katherine Jett: I can. Go ahead.

Lori Popejoy: All right. Thank you. This is just for future conversation on the Expedited Reinstatement. We have had clients in the past who have had to show up at the local office. One even had to come in an ambulance. And I'd like to ask that when we have the process for people who are severely disabled and are not able to actually go anywhere, if we could look at some type of virtual way that they could handle this. That's all. Thank you.

Derek Shields: Lori, thank you for submitting that. Obviously, we have our colleagues from Social Security on. We'll also capture that in writing for our follow-up actions that go to them. So appreciate your input and idea there to help out. Ana, let's turn to you. I know that there's been a good amount of activity in chat, along with some questions. Do you want to get us going there with a question for our presenters today?

Ana Morales: Sure. We have a question for Mike Anzick, and he already provided the question in chat, but it will be good for everybody to hear. Let's see, the first one is, is the survey only being sent to current Ticketholders, and has there ever been an interview on those who participated in the Ticket to Work Program and became self-sufficient, completing all the eligibility payments? Do you want to read your answer, Mike?

Mike Anzick: I can just remember what I wrote, generally. Yes, we are sampling Ticketholders who have either assigned or unassigned their Ticket over the last two years, so people don't have to reach way back in memory. We had started with the past one year, but we wanted the sample to be bigger to get our response rate up, so it's over the past two years. And the answer to your second part of your question is that this survey, it's not addressing the long-term outcomes for Ticket beneficiaries. That's a research question that can be addressed. Thank you for mentioning that. I know we do a Ticket to Work evaluation, and that would be a question that could be included in that one as well. But this survey is just for Ticketholders who have assigned or unassigned over the past two years, not having gone all the way through the program to self-sufficiency. They may have if they did it quickly after the two years, but that's okay.

Derek Shields: Thanks, Mike. Appreciate that. Ana, let's go back to you with another question coming out of chat.

Ana Morales: We have a question for Charles. Well, we have a couple, but one of those is, how does one have an SSA review their earnings to determine if a UWA, I'm assuming that's unemployment wages, could be used during the EPE?

Charles Killen: Okay, it's unsuccessful work attempt. Could you repeat the question? I didn't understand the first part of it. I'm sorry. The UWA is unsuccessful work attempt.

Ana Morales: Unsuccessful work attempt. There you go. How does one have an SSA review their earnings to determine if a UWA could be used during the EPE?

Charles Killen: Okay, so they're going to report their work just as normal, and they're going to submit their pay stubs. And when we determine — sometimes the unsuccessful work attempt has to be kind of adjudicated retroactively because they're going to report their SGA work. And we don't know whether it's going to end. We hope it isn't. We don't know if it's going to end in the next six months, right? So we're going to develop everything the way we would normally develop a work activity report and a report of earnings. And then at the time of that, if and when that work ends, if it's within six months, then we would get information from the individual about

why the work ended. And the period before the work, and if there's a period after the work where they're not working, then they would develop that. The technician just develops that based on the information that's provided. So we look at periods of work. If the period of work, if a cessation has not yet been posted, and the period of work is less than six months, the technicians automatically will look to see if it is an unsuccessful work attempt.

Derek Shields: Thank you very much, Charles. Appreciate that along with your presentation. Anna, we'll be back to you in a moment. Let's go over to Katherine. It looks like we have a raised hand for a live question. Katherine.

Katherine Jett: Hi, Derek. We have Samuel Patterson. Samuel, you're unmuted. Just unmute your mic. Ask your question, please.

Samuel Patterson: Yes, I have a couple of beneficiaries that have been receiving SSDI payments since, say, 2005. And I understand the rolling 60 months for getting a new trial work level payments or new trial work levels recognized. And I have a couple of them that I just have put on the Ticket to Work Program, say, like since 2019. And they finished their trial work level, are working towards SGA, yet SSA has levied \$10,000 or more in their overpayments. And when I pulled a BPQY on them, it didn't go back that far with their work history. So I had no idea of whether or not they may have achieved it before they were ever enrolled in Ticket to Work Program. What would be my position on that?

Derek Shields: Thank you, Samuel, for your question. I appreciate that. Is it possible that we have either someone from Social Security or Mary Kay that would like to chime in?

Charles Killen: I don't really have an answer to the back part of the question. I just wanted to clarify something that he asked in the question to start with. An individual per period of disability only gets one Trial Work Period, so there would be no situation where an individual would be working toward getting another Trial Work Period. I just wanted to clarify that. But as far as, you know, other than what we've already talked about, I'll let someone else address the overpayment issue.

Derek Shields: Thank you, Charles. Knowing that there's only one Trial Work Period, it could be those nine months over a period of time, but it is only one period itself. Go ahead, Samuel.

Samuel Patterson: What I was thinking is that that trial work level may have been achieved during the early stages of their disability claims, and yet they've never been enrolled in the Ticket to Work Program. So when I pulled them up, it didn't show that they've ever been enrolled, and it didn't show on their BPQY that they've ever achieved any months towards trial work levels. So I just kind of wondered how that may have occurred. And then, like I said, normally on the BPQY, I would get at least three years of work history. I didn't get that. So I just kind of wondered how, you know, that was done, the overpayment, especially at that level, that amount.

Derek Shields: So what I'd recommend, Samuel – is I appreciate this. We got a beginning of an answer, but what we would prefer, is, if possible, for you to send that to us at EN Service and we could explore that a little bit further with Social Security.

Samuel Patterson: Okay.

Derek Shields: It seems like there was work done without somebody actually having a Ticket assigned, and you're wondering how to explore alternatives to that when you approach a Ticketholder later after that work had occurred. So Ana, if we could have that email address placed back in chat. Samuel, it's a good question. We appreciate it, and we'll bring that to Social Security and be back to you.

Audience Member: Thank you much.

Derek Shields: Thank you. I'm going to go back to Katherine to see if there's any other raised hands for questions.

Katherine Jett: Hi, Derek. We have no raised hands at this time. We would like to advise everyone, if you do have a question, please just click the raise hand icon. Thank you, Derek.

Derek Shields: Thanks a lot. Ana, I know that we continue to have some questions and comments come through chat, and we have a lot of folks that are responding to them today. So thanks. Our presenters and other team members have been responding. It's hard to summarize the breadth of the comments and questions because they have been across the board. We'll try to do that in the All EN Call recap. Ana, do you have a particular question for a presenter that we could bring in today?

Ana Morales: Yes. I have one for Kendra. Somebody was asking if all individuals can call the WIPA directly and if they don't need to go through the Ticket to Work Help Line to get a referral. And along with that, another question is if you could repeat the youth referral process?

Chandra McLaughlin: Sure. So no, they should still go through the WIPA helpline when they're referring beneficiaries. And the childhood process, we're going to enhance the script, which will basically direct them to call back at a later time when their circumstances change.

Derek Shields: Thank you, Chandra. So it's delaying the referral to a period where they're closer to employment as opposed to transition from education? Is that correct?

Chandra McLaughlin: Correct. Correct.

Derek Shields: Okay. And as this change goes into effect on December 11 with the Helpline.

Kendra McLaughlin: I was going to say on Monday, December 11, it goes into effect. And I'm going to have an email. I'll ask Natalie, can she send a blast out that just kind of bullets some of those points.

Derek Shields: This is Derek. Thank you, Chandra. I think that will help in reinforcing what you brought to us today with the updated referral process. Appreciate that.

Chandra McLaughlin: No problem.

Derek Shields: And Lori says thank you in chat as well. That was helpful.

Chandra McLaughlin: No problem. You're welcome.

Derek Shields: Ana, let's go back to you for another question.

Ana Morales: For Charles, do you have any stats on EXR, such as the percentage that are reinstated versus not?

Charles Killen: No, I don't have any stats today to share. The EXR presentation will be in a future call. I can try to come up with something before that.

Ana Morales: And I can give you another one. What is the difference between the Extended Period of Eligibility and the re-entitlement period?

Charles Killen: The re-entitlement period is the first 36 months of the Extended Period of Eligibility. During that first 36 months, if an individual works at above SGA levels, we'll post what's called the cessation month, and they'll get the two grace months after that. And for the remainder of that 36 months, we'll be able to pay benefits for any months that's below SGA, and we would suspend benefits or benefits would not be payable for any month that's above SGA. After that first 36-month re-entitlement period, if the individual is not working at above the SGA level, their benefits will continue, so their EPE continues. But once they work at above SGA levels, after that 36-month re-entitlement period, benefits would terminate. So one is the EPE and re-entitlement period, and the rest is the extended EPE, like what comes after the re-entitlement period. So they're kind of the same thing, only two different parts of the same thing.

Derek Shields: Thank you, Charles, for both those responses. The first one saying we will be having Charles back for a more detailed presentation, and we'll see if he can come up with some statistics to share as part of that. And the other just reviewing kind of the details of how these come together in the sequence of timing. There was another question that came in, and I believe Chandra has now answered it in chat to reinforce kind of the process. There was, I'm just getting a piece of the question, Chandra, that said, you know, can we still refer Ticketholders to the Choose Work tool in order to do their own search? And will that still, you

know, refer them to a WIPA, how it's currently designed, compared to the changes in the Helpline referral process that you described? Would you care to answer that for us, please?

Chandra McLaughlin: Yes. The Choose Work tool has not changed. So the only change is when actually calling the helpline.

Derek Shields: Thank you for reinforcing that. You mentioned that during your comments, but I think people are taking a lot of changes in.

Chandra McLaughlin: Yes.

Derek Shields: The only place this is changing is with the helpline referral process, all of your EN agreements that are in place with WIPAs will remain, and the Choose Work website will continue to use that Find Help tool in the same way as well.

Chandra McLaughlin: Correct.

Laura York: And, Derek, this is Laura York. Just wanted to quickly mention from SSA that we will be making updates to the Find Help tool to reflect those changes that Chandra spoke about.

Derek Shields: This is Derek. Thank you, Laura. So there will be some changes that are forthcoming that are just not in place yet. Laura, do you anticipate that being notified via GovDelivery or a future All EN Call for an update when those changes occur?

Laura York: I would imagine that we'll be sending a GovDelivery. And as those changes come closer to fruition, we'll definitely make sure people are aware.

Derek Shields: Thank you very much. So we have about five minutes left in our Q&A session today. As a reminder, if you would like to ask a live question, please raise your hand and Katherine will assist you. And we have a couple others that have come in through chat. Ana, do you want to select one of those for the team?

Ana Morales: Sure. Well, I have actually one that came earlier for Patrice. And let me just read it. Ticketholder engagement update. We have had a conversation with the Ticketholder regarding the TPR and updating IWPs. Some Ticketholders are resistant to having their Ticket unassigned when normally staying at the Ticket to Work Program, the goals, et cetera. However, some Ticketholders have been informed that they must remain in the Ticket to Work Program. Can you provide a script or guidance on how to handle these calls?

Patrice McLean: This is Patrice. Ana, can you repeat the beginning part of that question? I heard it, but I'm not sure where that question is coming from, and I'm wondering if I missed that in the very beginning part.

Ana Morales: We have had a conversation with Ticketholders regarding TPR and updating the IWPs. Some Ticketholders are resistant to having their Ticket unassigned. We normally stay at the Ticket to Work Program, the goals, et cetera. However, some Ticketholders have been informed that they must remain in the Ticket to Work Program. Can you provide a script or guidance on how to handle these calls?

Patrice McLean: Thank you. Okay, so I didn't miss it. I wasn't sure. To answer the question, I can provide guidance. The Ticket should only be assigned if both the Ticketholder and the EN are actively pursuing self-sufficiency for that Ticketholder. So I also saw in the comment section before there were questions about if someone is too sick to work and they've been out for months or so. We understand that Ticketholders are hesitant to unassign their Tickets. But for the Ticket to be assigned, there should be an active pursuit towards self-sufficiency. So in the case where this individual is hesitant, if the EN and the Ticketholder are not working together toward employment for that individual, there should be no assigned Ticket. The Ticket shows the assignment and the IWP are a demonstration that the Ticketholder and the EN are in agreement and working towards the goal of employment. If that's not happening for any reason, the Ticket should be unassigned. So we understand that Ticketholders are hesitant to have their Ticket unassigned. But if there is no activity, then the Ticket should not be assigned.

Robert Pfaff: Thank you, Patrice. I would add to that that the goal of the program is free and voluntary, right? And when we say voluntary, it's voluntary between the beneficiary and the Employment Network that they're working with. So at any point when the Employment Network or the beneficiary deems that either the services that the beneficiary is receiving, for example, aren't the right services so that the Ticketholder would unassign at that point and work with somebody else, for example, or that this individual is not going to go back to work and should no longer therefore be in the Ticket Program, then the EN would unassign. But there's a lot of different scenarios between those two examples and everything else that you can imagine. But I do want to emphasize that this is a two-way agreement, but either party can decide at any point that it's no longer a good fit for one or the other. So I just wanted to add that point.

Derek Shields: Thank you, Rob, and thank you, Patrice, for providing the responses to that question. At this point, we don't have any other hands raised, and we're getting close to the conclusion of our 90 minutes together. What I'd like to do now is to thank our presenters and move forward to some closing remarks and some reminders about a couple items around the corner. So if we can go to the next slide, please.

Again, on behalf of our presenters from the Social Security Administration and our guest from Disabled Person Inc., Mike Corso, and all of us at the Ticket Program Manager team, we appreciate you joining us for today's final All EN Call of 2023. There will be a break in December from the National Calls and our EN Essentials Series. We'll come back in 2024 with full calendar of events. We did want to make you aware of a couple items, though. Our next All-EN Call is scheduled for Tuesday, February 27, 2024. If you have suggestions for that next All-EN Call,

please email those to us at enOperations@YourTicketToWork.SSA.gov . We appreciate your comments and suggestions for topics. They help drive the very content that you've heard today.

We do have a couple upcoming events. One is in December. On December 20 at 3 p.m. Eastern Time, we'll have our monthly WISE webinar, this one entitled, How Will Work Affect My Social Security Disability Benefits? When that content comes out through GovDelivery, we certainly would appreciate your assistance in passing that through to interested beneficiaries. And on January 23, as Erinn was reporting, there will be an upcoming APOR and Form 222 cycle coming forward. Our next EN Essentials will be in January on the 23rd at 1 p.m. Eastern Time, and those will be the topics. So we'll be having presentations on the APOR and Form 222 cycle at that time. So we would appreciate you penciling those in. Of course, we'll be sending out information in the near future, and we'll have that to you soon.

Thank you again for attending today's All EN Call, and please have a good and safe rest of your day. This All EN call is now concluded.