

**Ana Morales:** I want to welcome everybody to today's call. My name is Ana Morales again, and I will serve as your moderator for this call. And before we begin with our agenda and presentations, I would like to review a few logistics and housekeeping items. Can we please move to the logistics slide?

So the meeting is being recorded and transcription is also being captured. Part of the Ticket to Work program, we want to remind everybody that it's not permitted to record this call, nor capture the transcript. You can feel free to ask any questions on the chat section, and you can also ask the questions out loud when we go to that part of the call. We're going to have several Q&As today. And we are going to tell you how to ask those questions when we get there. And if you are joining via MS Teams, you can also ask a question raising your hand or writing your question in the chat. And closed captioning is available as well. Laura, I think I saw you raising your hand. Do you want to do a testing before we move on?

**Laura:** Katherine was just mentioning she didn't see me, so.

**Ana Morales:** Thank you very much. Thank you for joining us.

**Laura:** Thank you.

**Ana Morales:** All right. Let's move to the next slide, please. Okay. So for today, we are going to have welcome remarks by Rob Pfaff. We are going to have a topic about reporting non-work-related changes to prevent SSI overpayments by Marc Denos. We're going to have a short Q&A for him. And then we're going to have Renee Moore. She's going to talk about Section 301 policy. And we're also going to have another short Q&A just for that topic. And then we're going to have a couple of updates and reminders by Erin and myself. And then we're going to open the call for Q&A for any of the topics or any other questions that you may have. Let's move to the next slide, please.

Before we begin, I would like to welcome to all the new ENs that have joined the Ticket to Work program since the last EN Call for the last quarter, we have Hampden County Career Center in Massachusetts. We have Access Benefits Community Services in Maryland. Goodwill Industries of South Florida, they joined us with two business models, one traditional and one employer in Florida. We have the Arc of San Francisco in California. We have ServiceSource in Virginia. We have the Arc of Camden County in Jersey. And we have our GAP Consumer Directed Services in Virginia. So we welcome everybody to the Ticket to Work program. Next slide, please.

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So I will now introduce our first speaker who will be providing welcoming remarks and updates. It's my privilege to introduce Mr. Robert Pfaff, Director of the Office of Employment Support from Social Security.

**Robert Pfaff:** Thank you. Thanks, Ana. And good afternoon, good morning to all of you. Thanks for joining us today. We appreciate your time. And also, we want to thank you for the services that you provide our beneficiaries. Just briefly, I wanted to let you know that we are currently at the end stages of our site visits. This is the first time that we've conducted site visits since 2019, so it is great to be able to get out to see at least a few of you. We were working with a limited budget this year that we received late in the year, so I want to thank the team in particular for SSA that put the trips together so quickly and managed the funds for the travel so promptly, particularly Patrice and her team. So thank you for that. And for the individuals on our team that were out and actually conducting the site reviews, I was able to participate in a few of those myself. Just a couple of reminders from -- and this is anecdotal, but we will -- after the site reviews are concluded, we will get together and compile the things that we found while conducting the reviews. And part of that is input from you, the ENs, that we get to visit your input in terms of what we can do to improve the Ticket to Work program. But I will note, just make sure that you are keeping your information updated with us in terms of your contact information, your address, your telephone number for contact and things of that nature, your staffing changes, et cetera, very important. One thing that we were able to share with some ENs that weren't aware of is that the commissioner did make some substantial changes to our overpayment, repayment policies. So the Commissioner O'Malley earlier in the year -- and we did send a blast out about this recently -- changed the rules in terms of repaying overpayments quite substantially, making it far less punitive on the beneficiaries. Changing, for example, the amount of overpayment from benefits from 100 percent to 10 percent of the benefit amount, or \$10, whichever was more, and some other things. And that information was sent out via blast. You should have seen that information. And it is important to note, because it is a game changer, we think, for the Ticket program and for folks going back to work who, if they do go back to work, aren't necessarily punished by the severity of the overpayment to the extent that they were previously. So that's important news and important to share with your clients who are interested in going back to work. We'll have some other tidbits to share with you from those visits as well. But at this point, I want to go ahead and turn it back over to Ana Morales. Ana?

**Ana Morales:** Thank you, Rob, for your remarks. And now we would like to move to our next presenter. We have Marc Denos from Director of the Office of SSI and Payment Integrity Policy. He's going to talk to us today about reporting non-work-related changes to prevent SSI overpayments. Mark, over to you.



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**Marc Denos:** Great. Thanks, Ana. Good seeing you, Rob. It's been a while. So thanks, everyone, for having me today. As mentioned, I'm Marc Denos, the Director of the Office of SSI and Payment Integrity Policy. And why am I here today? So first off, I'm here to request your assistance. What I need from you all is to help remind our SSI recipients the importance of reporting changes, including work changes, that could affect their eligibility and payment amounts. Thus, timely and accurate reporting ensures that we pay the right people, the right amount, at the right time, thereby reducing improper payments. Ana, if you'll go to my first slide, we'll start to talk about what some of these critical issues are. So what are the leading causes of SSI overpayments? First and foremost, too much money in financial accounts, bank accounts, trust accounts, stocks, bonds, those types of accounts. Wages. Wages constitutes both non-reported and earnings that are more than previously estimated. And living arrangement changes. Living arrangements are crucial to how we determine eligibility and payment amount for SSI recipients. Although, those issues aren't just relevant to overpayments. Wages and living arrangement changes are also the leading causes of underpayments. Next slide. I'm sorry, I think we can go back one. My apologies. All right. And fast forward. My apologies, people. Yeah, I was -- I'm filling in for someone and I just got versed on this presentation, so my apologies. So wages aren't the only form of income relevant to the SSI program, though. There are two primary categories of income. First, there's earned income. Earned income can be in the form of wages, net self-employment, and royalties, to name a few. And unearned income. Unearned income is all income that is not earned. Examples would include your Social Security benefits, pensions, unemployment, workers' compensation, to name a few. However, it doesn't stop there. There are two additional types of income that fall under the unearned income category. This could be deemed income. Deemed income is any income from a spouse or parent that lives in the same household as an SSI recipient. That income is used to also compute the SSI payment amounts for the individual SSI recipient. And finally, there's in-kind income. In-kind income is non-cash income that's in the form of food, shelter, or both, that a recipient gets for free or for less than its fair market value. Slide number four, please.

In addition to income, we also look at things people own or their resources. Currently, the statutorily set resource limit for an individual is \$2,000. And \$3,000 for an SSI couple. One thing to keep in mind is that when calculating resources, we look at the value of the resources at the first moment of the month. So let's use bank accounts as an example. We would look at that bank account and how much is in that account and what works towards the \$2,000 resource limit for an individual as of the first moment of the first day of that month. Any fluctuations that occur in the bank account during the middle of the month would not be considered or accountable towards our resource limit. Examples of resources are cash, bank accounts, stocks and bonds, the land that you do

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not live on. We do exclude your primary residence. Life insurance policies, vehicles, and anything else that can be changed to cash or food or shelter constitutes a resource. But not all resources count. Excluded resources are, as mentioned, the home that you live in, the accompanied land, one vehicle, household goods and personal effects, life insurance policies or the cash surrender value of a life insurance policy is excluded up to \$1,500 or less, burial spaces. And then funds set aside for burial, also up to \$1,500. And then finally, our largest exclusion would be ABLE accounts. And ABLE accounts are excluded up to \$100,000. Slide five, please. Or next slide.

Living arrangements are the third non-medical factor used to determine SSI eligibility and the amount of the SSI payment. And SSI payments may vary depending on where a recipient lives, such as their own home, someone else's home, a group home, or an institution, to name a few. Next slide.

So now that we've talked a little bit about the role of income, resources, and living arrangements, here are some of the major SSI reporting responsibilities that recipients must report to us. Change of address. A change in living arrangements. Changes in earned and unearned income. And change in resources. The death of a spouse or anyone in the household. A change in marital status. Change in help with living expenses, eligibility for other benefits. If that person were to enter an institution, including jail and others. What we try to remind people of is, despite the complexities of the SSI program, is that if you have questions involving your income, your resources, or your living arrangements, and experience changes in those areas, then you should always reach out to our agency by calling the 1-800 number or contacting your local field office to report those changes to determine whether or not they would have an effect on your eligibility or your payment amount. Next slide. So, additional resources. Much of the information that I just discussed can be found in what we generally refer to as kind of our handbook of the SSI program, which is the Understanding SSI publication. That's the second link that you can see here on the page. That's also found on our Understanding the SSI Income homepage. And then we have a unique to our reporting responsibilities, which you can refer to as well. So I believe we have some time set aside for questions and answers. I'll do my best. As mentioned there, as I was going through a little bit of technical difficulties, I am filling in for my technical expert today. So I will do my best. Anything that I can't answer, I'm more than happy to take that back, though, and provide you on with an answer if you have a mechanism for providing that back to the audience.

**Ana Morales:** Thank you, Mark. Let's move to the next slide to remind the participants how to ask a question. Over the phone, please raise your hand on Teams by dialing star 5, and you will be unmuted by the facilitator, and then press star 6 to unmute yourself as if you're on the phone. And over Teams, you can enter your question in the chat or raise

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your hand and then we will open up your microphone. Let's go over to raised hands since I think I see one.

**Katherine:** Yes, thank you, Ana. Amanda, you have access to your mic. If you would click the microphone up top to unmute and ask your question.

**Amanda:** Hi. I had a question about the ABLE accounts. If an employer contributes to the ABLE account, does that count as in-kind or unearned income?

**Marc Denos:** So you would take me straight to our Trust and ABLE policies. You know what, that is an answer that I would have to refer to our technical specialist on how contributions, including those made from employers, would count. But, generally speaking, is that ABLE accounts are excluded up to the full \$100,000 face value. Now, whether or not those contributions do come from an employer, like I said, I'd want to verify that information with my technical expert.

Amanda: Yeah, that'd be great. The other one in similar line to that is 401(k). Does that count as unearned income?

**Marc Denos:** So 401(k)s do not count as unearned income, but they generally count as a resource.

**Amanda:** Okay, thank you.

**Katherine:** Thank you, Amanda. Ana, we have Wendy. Wendy, you have access to your microphone if you'll unmute and ask your question.

**Ana Morales:** Hi, Wendy.

**Katherine:** Hello, Wendy. Your mic is active. Just click the microphone up top on the screen, and that will unmute you, and you can ask your question. Okay. While we wait on Wendy for just a moment, we'll go ahead and go to Justin Baker. Justin, you're unmuted. Please click the microphone and ask your question.

**Justin:** Thank you.

**Katherine:** Sure. No problem.

**Justin:** Okay, cool. So I typed it out because I was like, oh, maybe it'll be better for a question. So, thank you for going over this regarding SSI overpayments, but I had a question regarding SSDI. Because sometimes it feels like it acts differently. In the vast majority of times that I've worked with people who come to my program when they have thousands in SSDI overpayments that seem to always happen during EPE for people, is there anything happening for, like, you know, working with people in trainings and whatnot, where accurately and timely reported wages are not going to negatively impact

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people's benefits? Because, again, people are reporting on time. They're doing their job that, you know, while they're working to report their wages to Social Security, and yet months where they should not have received their SSDI payments, they are still receiving it. And then later on get blamed by Social Security saying, "Hey, you have an overpayment. Pay us back." Is anything happening to improve that process so that Social Security isn't paying when they shouldn't be paying?

**Marc Denos:** So that's a little bit outside of the SSI program. What I will say is that the agency right now, as a priority initiative, is looking extensively at overpayments. There's an agency-led work group called the Overpayment Review Team that was formed by the commissioner. So these types of situations are being given significant attention right now, and I do believe that the agency is coming up with quite an extensive list of areas within the overpayment realm that need to be evaluated. And I would venture to say that, yes, you've raised an important issue. I think it probably reflects, like, the timeliness that our technicians are able to process information that they receive from the public. In those situations where they're not timely processed, overpayments have been created. And like I said, I know that that's a situation that the group is looking at now. What I will say, though, in regards to overpayments, if people, you know, face an overpayment, they receive a notice informing them that they've been overpaid, that they should follow the instructions in that notice, which is to contact Social Security. We have a reconsideration process, a waiver process. You can go through the various levels of appeals in order to explain the circumstances, and all that will be given consideration in determining the validity of that overpayment, as well as whether or not a person is responsible for paying it back. I know that didn't entirely answer your question, but hopefully that helps.

**Justin:** It definitely helps knowing that a committee is being created is definitely a positive thing for this process. Do you think timeframes for when these reports come up are going to be looked at as well? Because I'm working with someone right now with an overpayment that was apparently started 30 years ago.

**Marc Denos:** Right. Yeah, so we're doing a lot of things right now. It's not a waterfall approach. Some of the things that -- and I'm sorry, guys. I know we're getting a little bit off topic. I'll throw one thing out there, and that is that, for example, we used to have like a 100% recovery rate once an overpayment was created. If a person did not contact us and elect on the alternative overpayment recovery method, then we would withhold their full benefit check. By default, we've reduced that now to where we'll never request more than 10% recovery unless a person requested a different amount. So those are the types of big changes that we're seeing right now in the overpayment realm, and you'll continue to see those changes as we move forward.

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**Justin:** Thank you.

**Katherine:** Thank you, Justin.

**Ana Morales:** Do we have Wendy back, Katherine?

**Katherine:** Hi, Wendy. Your mic is active. If you'll click the microphone up top and unmute yourself, you can ask your question, please. Okay. I'll work with Wendy.

**Ana Morales:** Okay. Maybe let's get a question from the chat. Brittney, can you read it out loud, please?

**Brittney:** Sure. Forgive me if I'm saying your name wrong. It's Armina. The question is, does unemployment benefits count as income?

**Marc Denos:** So they do. Unemployment benefits count as income. The only exception that we saw to that was during the pandemic, so there was a period of time where, during the early days of COVID pandemic, we did exclude unemployment. But otherwise, yes, it normally is countable under earned income.

**Ana Morales:** Thank you. Do we have any more raised hands, Katherine, or is that still Wendy?

**Katherine:** We have one more raised hand. We have Eddie.

**Ana Morales:** Okay.

**Katherine:** Eddie, your microphone is active. If you'll click your mic and unmute and ask your question, please. Eddie? Hi, Eddie. You have access to the audio. If you'll just click your microphone up top and you may ask your question, please.

**Eddie:** Hi. Good afternoon. My question is for Mark, Mr. Denos. The question is about the resource limit, the \$2,000 for individual and \$3,000 for couple. How long that law, that limit, this amount has been there? I don't know if it's 20 years. Because now \$2,000 is kind of fleeting as a resource limit. If it's \$2,000, the resource limit for 20 years ago, suppose -- is it supposed to stay \$2,000 now with the inflation rate?

**Marc Denos:** So I'd have to go back and, you know, check my records to see exactly. I want to say that it was in the '80s. So, it has been at a stable amount for a number of decades now. What I will say in regards to that is that we're always looking for opportunities to bring our policies up to more contemporary standards. Unfortunately, this is a statutory set amount. So, we do have, you know, I guess a lack of control, for lack of better words, on how much we can make changes that relate to those resources amount. And in this particular situation, like I said, it is statutorily set. That would require legislation. Congress would have to pass the bill and subsequently sign into law. It's

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something that we've looked at it in the past. We continually have proposals that we send out as ways to bring the program up to more contemporary standards, as well as to simplify and streamline it. That's something that we'll continue to do. So I do recommend that, you know, if you have relationships, as you advocate on the Hill, where you see opportunities for us to bring the program up to more contemporary standards, by all means, share that.

**Eddie:** Thank you.

**Katherine:** Thank you, Eddie, and thank you, Mark. Turn it back over to Ana.

**Ana Morales:** Thank you, everybody. We want to thank Marc for his participation. You did a great job, despite covering for somebody else. We really appreciated having you on the call. And I know that there are more questions in the chat that we can capture and share with you. And if you don't mind shared responses, we can also share with everybody. So, we really appreciate you having you on the call today. Thank you.

**Marc Denos:** Absolutely. Thanks for inviting me. And by all means, if a question comes in that relates to this area, then certainly share.

**Ana Morales:** Thank you very much. Before we move on, we just want to remind everybody that TPM and Social Security are answering the questions in the chat. So you don't have to take that action, I want to say. So we will definitely address all the questions, and if we cannot address the questions because they are for a particular speaker, we are going to share with them to get the answers. All righty, let's move to the next slide, please. So now we are going to have Renee, and she's going to talk -- she's the policy analyst with Social Security, and she's going to share with us important information about Section 301 policy. Renee? Over to you.

**Renee Moore:** Thank you, Ana. Good afternoon, everyone. I'm Renee Moore with the Office of Employment Support, and I'm here to share a brief training to make you aware of our Section 301 payment continuation policies. Next slide.

So, here's a little background of Section 301. To be eligible, an individual receiving Title II or Title XVI, benefits based on disability or blindness must be medically ceased or determined to be ineligible due to an age 18 redetermination and meet all of the following requirements. The individual must participate in an approved program of VR services or vocational rehabilitation services, employment services, or other support services. The individual must begin participating in the program before the month their disability or blindness ceased. This means an SSI child must be in the program prior to or in the month of age 18 SSI medical cessation. If the beneficiary stopped participating prior to the month of cessation, in the month of cessation, or during the month after the medical cessation, there is no potential Section 301 eligibility. The individual must



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participate in the -- his participation in the program must continue through the two-month grace period after cessation. And lastly, we must determine that the individual's completion of the program or continuation in the program will increase the likelihood that the individual will not return to the disability roles. Next slide, please.

So what is an appropriate program? Well, here are a couple of examples of an appropriate program. They include, but are not limited to, an individualized education plan, or you may know it as an IEP. A state vocational rehabilitation program, using an Individualized Plan for Employment, or IPE. Employment Networks, and participation in a Plan to Achieve Self-Support. You may know it as PASS. Next slide, please.

When does Section 301 entitlement end? So the entitlement ends when an individual completes the program, the individual stops participating in the program, or we determine that the continued participation in the program will no longer increase the likelihood that the individual will not return to the disability roles. Benefits terminate effective the month -- after the month of program completion or the participation stopped. And I'll repeat that. Benefits terminate effective the month, after the month of program completion or participation stopped. Next slide.

When to flag Section 301 cases. So we flag Section 301 cases during a medical CDR, or a medical continuing disability review, or during an age 18 redetermination. We ask whether the beneficiary is participating in VR, employment, or other support services during these interviews. If the beneficiary indicates that they are, we mark the case with a potential Section 301 case flag to develop for participation if there is a medical cessation. If it is an e-CDR or an electronic CDR, which most of them are nowadays, the system automatically flags the case. Note, Section 301 does not apply if the case is a continuance. Remember, one of the eligibility factors is that the individual has to be medically ceased, right? So, if it is a continuance, there is no Section 301 eligibility. Next slide, please. Section 301 development after the medical cessation. So, we developed for Section 301, if an individual appeals the decision and requests statutory benefit continuation, SSA does not pursue verification of vocational rehabilitation participation. And I'll repeat that. If an individual appeals the decision and requests statutory benefit continuation, you may know it as SBC. We do not pursue verification of the vocational rehabilitation participation. If they do not request SBC, SSA will contact the vocational rehab service provider listed on the medical review forms and collect information about the program on our SSA 4290 form. We will then send the case to another office to determine if the program meets the requirements and if participation will increase the likelihood of permanent removals from the roles. SSA will inform the individual of the decision. If it's an approval, the individual will continue to receive benefits if they meet the non-medical requirements for payment. Next slide, please.

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That concludes our training. If you have any questions, you can jot down the reference on the slide, which is the policies for Section 301. They are DI 14500. And then, there's a number of policies, of sub-policies. So, you'd put DI 145000.015, or 030 or 035 in order to see our Section 301 policies. And now I'll hand it back over to our moderator, Ana.

Ana Morales: Thank you, Renee. And just a comment. Brittney posted in the chat the specific policies that Renee was alluding to, so you can get the links from there. All right, so let's go to the next slide. As a reminder, to ask questions over the phone, you need to either raise your hand on Teams or, if it's via phone, press the star 5 and you will be unmuted by the facilitator. Then press the star 6 to unmute yourself. And if it's on Teams, you can raise your hand or ask your question on the chat. And as a general comment, if we don't answer your question, you can email them to [ENOperations@yourtickettowork.ssa.gov](mailto:ENOperations@yourtickettowork.ssa.gov). Do we have any raised hands? I don't think so, right, Katherine?

**Katherine:** Correct. We don't have any at this time.

**Ana Morales:** All right. Thank you. Brittney, do you have a question in the chat?

**Brittney:** Yes, I do have one question from Janine. "Does Section 301 only apply to beneficiaries turning 18 years old?" Renee?

**Renee Moore:** I'm sorry, can you hear me, guys?

**Brittney:** We can hear you now.

**Renee Moore:** Okay. I'm sorry. I was trying to unmute and it wouldn't unmute. Can you repeat the question?

**Brittney:** Sure. Does Section 301 only apply to beneficiaries turning 18 years old?

**Renee Moore:** No. Section 301 does not apply to beneficiaries turning 18 years -- does not only apply to beneficiaries turning 18 years old. Thank you.

**Katherine:** Go ahead, Brittney.

**Brittney:** We have one more that's really more of a clarification from Angelina.

**Renee Moore:** Okay.

**Brittney:** Those who are using Section 301 are not eligible to assign their Ticket to Work if they have not done so already. For example, a child has an IEP and is with VR and turns 18. They are denied age 18 redetermination. So they didn't have any previous Ticket to Work eligibility. Correct?

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**Renee Moore:** That question I'm going to have to take down. I'll have to take that down and get back to you with that.

**Brittney:** That's all the questions for the chat right now.

**Renee Moore:** Okay. Thank you, Brittney.

**Brittney:** No problem.

**Katherine:** Hi, Ana. We have Justin. Justin, you have access to your audio.

**Justin:** It's not a question. It's not a question. I think I have a partial answer to that previous one, actually. So VR agencies act as kind of Ticket to Work programs of sorts. They have priority over standard ENs for things like trial work -- not trial work. I'm sorry. Phase one milestones, one through four payments. They get the priority and are, in a sense, a Ticket to Work program. As long as they're enrolled at a VR, they cannot enroll in an EN at the same time, if that's what the question was asking.

**Ana Morales:** Thank you for that, Justin. Yeah. To Angelina, we're going to capture your question and we will follow up with Renee on that one.

**Katherine:** Okay. Ana, we have another participant with a raised hand. We have Eugenia. Eugenia, you have access to your microphone. Please click your microphone and ask your question.

**Eugenia:** Hello. I want to say hi to Ana first.

**Ana Morales:** Hi, Eugenia.

**Eugenia:** As far as the question that she was talking about where Ticket applies, VRs don't --

**Katherine:** Do you have a -- hold on, do you have a question, Eugenia? What was your question? I'm sorry. You said you --

**Eugenia:** Can you hear me okay?

**Katherine:** Yeah, I can hear you now.

**Eugenia:** When an individual is between 16 and 18 and they're with VR on SSI, we are able to collect cost reimbursement payments for them. After they turn 18, they aren't eligible for a Ticket until after they turn 18 and have met the age 18 redetermination. So that was the question is do -- are they able to get a Ticket? There's no Ticket involved between the ages of 16 and 18 when they're on SSI. So we're not acting as an EN. We're just participating in a different program.

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**Ana Morales:** Thank you for that clarification, Eugenia. All righty. Again, if you were not able to ask a question or if you didn't receive a response to your questions, please email them to [ENOperations@yourtickettowork.ssa.gov](mailto:ENOperations@yourtickettowork.ssa.gov) and we will share them with Social Security and get answers for you. Let's move to the next slide, please. Okay. So now we're going to have our next speaker, Erinn. She's going to share with us some EN updates and reminders. Erinn?

**Erinn:** Hi. Okay. So, as you all know, we updated the employment verification process recently to ensure that SSA has up-to-date contact information and to ensure that portal users maintain access to the Ticket Portal. So July marked the first time that we used this updated process. We received positive feedback on this updated process specifically, we heard that this process was much faster and easier since you only had to verify the main points of contact and portal users. So, thank you all for who provided feedback for doing so. In October, we will begin the employment verification process again. So, this will be the third and final employment verification for the 2024 calendar year. And we will send information about that October employment verification soon. So, keep an eye out for that delivery message. Just a couple reminders when you are completing this employment verification. First, it's very important that you complete the employment verification before the given deadline. Failure to complete that employment verification before the deadline could result in your portal user being locked out of the portal. Second, even if your EN does not have a portal user for any specific reason, you know, you're a new EN, something like that, you're still required to complete this employment verification. So if you do not have a portal user, EN service can send the main point of contact and portal user information by email for you to verify. And the program contact will still need to use that SurveyMonkey link to affirm their employment and complete the process. That is all I have for you today. Thank you all. And back to you, Ana.

**Ana Morales:** Thank you, Erinn. And we're going to open up questions for Erinn in a few. Before we move on, I want to thank Renee. Thank you very much for sharing the important information about 301 with us. I really appreciate it. And thank you, Erinn, for your information as well. I just have a couple of reminders about TPA change forms when you send them to EN service. And those are that if you are removed -- these are very specific, by the way. So, if you are removing staff from your EN, you don't have to submit one TPA per staff, for example. You can submit more than one individual when you submit these changes. So, I know that Section 4, Page 8, specifically of the TPA change form, has a space for at least two individuals that you can remove at the same time. Obviously, the reason of the request is to receive one change and include as many of your staff that you need to include. And we totally understand that this happens as you are removing staff from your organization. But sometimes we receive several

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TPA change forms for one individual only. So, this is just a request from our team to expedite the process of updating the system with this information. Another reminder is that when you have a new hire and you send your TPA change form, you obviously need to start suitability and include the 222 Form for them as well. And the last one. To please fill out all the sections completely when you are submitting each TPA change form to complete all the fields that are necessary. And that is, again, to expedite all the different TPA change forms that EN service is receiving. So, thank you for that and for taking that into consideration. And with that, let's move to -- oh, we're already in that slide. Thank you, Alicia.

So, we're going to move to the last Q&A session of today's call. Raise your hand -- if you're over the phone, raise your hand. Press star 5 and then you will be unmuted and you have to press star 6. If you are here on Teams with us, you can enter the question in the chat or you can raise your hand. Okay. And I think we have a hand already.

**Katherine:** Yes, we do. We have Jill. Jill, you're unmuted. Do you want to click your microphone and ask your question, please? Okay, Jill. You have audio access. If you'll just click your microphone and ask your question, please.

**Ana Morales:** She typed in the chat that she's trying.

**Katherine:** Okay. So, we're going to go ahead and click her microphone one more time. There you go. There you go.

**Jill:** Oh, my gosh. That was not easy. Hi. Good afternoon. Thank you, everybody, for the information. Regarding the TPA, I do have two people who have completed suitability, but they have not started their training for portal use. Do they need to be included?

**Erinn:** Absolutely. Did you submit your TPA change form, adding them as Ticket Portal users?

**Jill:** No, because they're not users yet, because they haven't gone through the training.

**Erinn:** Correct. So, technically, you need to do that step first, because we need to know your intent of assigning somebody with a specific role. And you need to submit their TPA change form to EN service once it's processed, they will send that information to my department, which is EN development and training, and we will initiate the training. The training will help them from zero, from basics of the program to suitability, to general information, to having my SSA account, et cetera, et cetera, and portal usage as well. So, that's the first step that you need to do. Complete a TPA change form and send it to [ENService@ssa.gov](mailto:ENService@ssa.gov) to initiate the process.

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**Jill:** Yeah. Thank you very much. I talked to Glynis Moore about this, and I'm having a meeting with my two new people right after this meeting. So, just wanted to clarify that. Thank you so much.

**Erinn:** You're welcome. Thank you for your question.

**Ana Morales:** Thank you, Jill.

**Katherine:** We have another, it seems, Ana.

**Ana Morales:** Okay. Let's go ahead.

**Katherine:** Okay. We have a telephone number 3-8-8-8, last four. You're unmuted. If you'll press star six to unmute yourself.

**Speaker:** Can you hear me?

**Katherine:** I can.

**Speaker:** Yes. Hi. Good morning. I just have a quick question for you in reference to new hires. This came up recently. So in the past, we've been in EN since 2009, I believe. And we learned recently that we have to hire an individual before we send them through suitability, which is a concern for me because let's just say we go through the hiring process, which is very costly for employers, then they go through suitability and then they're not eligible. We've just wasted a lot of time and resources on someone that is -- that does not clear suitability. So, we have to terminate them. So, I just need to get clarity around that process.

**Ana Morales:** Thank you for your question. Do we have somebody from Social Security that would like to address that question?

**Erinn:** Just to clarify, you're asking whether or not we require that you hired an individual before they go through the suitability process?

**Speaker:** So, my question is, well, I was recently told that through several people from both Ticket to Work and SSA that we have to -- during the auditing period, we were told that we have to hire the person first, meaning the person has to be our employee before we can send them through suitability. And so, my response to the individuals was that it doesn't make sense to an employer because it's very costly going through the hiring process. And I can't speak for any other employer in terms of how they treat new hires, but whenever we are requiring a person to be available at certain times, we have to pay them for that time. And so when we're doing the new hire process, we typically in the past didn't hire someone to work in the Ticket to Work program, first of all, because it

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took too long until they passed. So I was recently told that we must hire the person because they must be listed as our employee before they can go through suitability.

**Robert Pfaff:** So I'll take a stab at this. I think it's a suitability question and issue. So in other words, what we can do is forward your question to our suitability experts and try to get an answer and then circle back perhaps during the next call. But, you know, I understand the issue. And I think also I think about it conversely for us. So let's say that an organization takes a potential employee and puts them into the suitability process, but does not hire them. And then the government goes through and uses their resources and so forth to determine if that person is suitable or not. And then for whatever reason, that person is not on-boarded, then the government would be putting their resources into an individual who is not an official employee of an organization at that particular time. So it's a tricky situation. I don't know. I guess the bottom line is I don't know if --

**Speaker:** It's sort of the same thing for the employer.

**Robert Pfaff:** Yep, it is.

**Speaker:** Do you understand? It can all be borne by the employer in the EN because foremost, we are reimbursed for the work that we do. And so we generally don't -- we go through -- I have several other programs that I do that are not related to Social Security Administration and Ticket to Work. And they all require a background check. And we do FDI, DOJ, and other types of background checks. However, so we generally have an idea before we actually offer an employer -- I mean an employee a position that -- well, first of all, when a position is even offered, it is contingent upon clearing our background checks. And we ask them, is there any reason why you wouldn't? So we already know from the beginning whether or not someone would clear, assuming that they're telling us the truth, right? So we go through the process. We generally get our FDI, DOJ background stuff done. It usually comes right back, right? And so when they -- by the time they've processed or even we get a response from Ian to start the suitability process, their DOJ and FDI has cleared. But not in all cases. But what I was recently told is that we are required to hire a person first before they go through suitability, which is really strange because they can't even know a person's initial. So what are they -- what work are they to do while they are going through the suitability clearance?

**Robert Pfaff:** Right. And so the issue is, do we have policies? Is there a government-wide policy or is there a policy within Social Security pertaining to the suitability process that speaks to this? And that's the issue that we need to investigate and get back to you, whether, you know, what that policy is or whether we have any policy at all. So that's basically -- that would be my response at this point. I just don't know that that's not -- and just to clarify, suitability is not a part of Ticket. It's a standalone human resources

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process. So we don't -- we wouldn't know those policies offhand. We'd have to consult with them. So we can certainly do that.

**Speaker:** I appreciate that.

**Robert Pfaff:** Yep.

**Ana Morales:** Thank you. Do we have a question in the chat, Brittney?

**Brittney:** We have one question. Justin wanted to clarify the employment verification. Is it simply that they can send an email to EN service and say, just, hey, I still work here, and that would verify them? Or is there any other steps that they would need to take?

**Ana Morales:** Erinn, do you want to chime in?

**Erinn:** Yeah, sure. So we recently updated the process. So in July, we had our most recent employment verification. And you should have received some GovDelivery messages about the process starting. And then the program contact should have received a SurveyMonkey link. And what you're asked to do is to have a portal user go into the portal, look at the main point of contact and portal user information, verify that that information is correct. If it's not, you'll need to go through the process to submit a TPA change form and update it. But once that information in the portal is correct, then your program contact would click on that link to affirm that all of the information in the portal is accurate. And this is particularly important for portal users because we do have to regularly verify their employment for them to maintain access to the portal. And we will have that process start again in October. We do it three times a year, once for security awareness and then July and October.

**Ana Morales:** Thank you for that, Erinn. Brittney, do we have another question from the chat?

**Brittney:** I have one question that just came in from Sarah. "Do we need to submit a second TPA change form requesting portal access after the training is completed?" I guess she's referring to when you were talking about the changes and submitting changes through your TPA change form.

**Ana Morales:** I'm sorry, can you repeat the question, Brittney?

**Brittney:** "Do EN's need to submit a second TPA change form to request portal access after training is completed?"

**Ana Morales:** Thank you. Thank you. No, you don't. You only need to send the TPA change form initially when you assign somebody for a specific role, and in this case the Ticket Portal user. And the training or the learning pathway is going to take your person



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to the point of requesting portal, and at first it's just initially a view-only access. And once they have the access, they continue with the portal module. They have a learning assessment with one of the analysts of the ENDT team. And after that, once they complete the training, they submit their certificate of completion to EN service to obtain full portal access. And that will give them the access. So, no, you don't have to submit more TPA change forms for that matter. All right. Do we have any other questions? Katherine, are you back with us?

**Katherine:** I'm back online.

**Ana Morales:** Awesome.

**Katherine:** We have two. Two raised hands.

**Ana Morales:** All right. Let's go with that. Thank you.

**Katherine:** Okay. Great. Amy, you have access to your audio. If you'll just unmute and ask your question. Please.

**Amy:** Hi. Can you hear me?

**Katherine:** Yes, ma'am.

**Ana Morales:** We can hear you.

**Amy:** Hi, everybody. Amy Wallish from Full Circle in Maryland. Thank you so much for the information. I have two quick questions. One is around the employment verification. Thank you for the new process. I did wonder, though, because I remember it was a survey link that comes that we have to click on, right, to approve, to say, yes, everything is accurate. But the only answer is yes. And what I will tell you is, for those of us who have been around for a while, looking in the portal at all of the changes is very difficult. And it's typically, at least in my experience, not accurate even after we've, you know, submitted change forms timely. I'm wondering about two things. One is, is it only going to be yes again or no? And two, is there any way that in the portal that we can get rid of the historical stuff or it can be pulled out as an Excel spreadsheet so we can sort it ourselves to make sure it's accurate? Because there's so many things in there that were not accurate.

**Katherine:** Absolutely.

**Ana Morales:** Erinn, do you want to? Thank you.

**Katherine:** Hi, Erinn.

**Ana Morales:** That's an Erinn question.

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**Erinn:** All right. So at this time, we were definitely thinking about moving forward with that one answer of yes, the reason being that the idea is that if you found information that's inaccurate, you would submit that TPA change form and wait the 48 hours for your -- for the portal to update and for it to be accurately reflected. The kind of the problem with accepting the answers of no is that then we have to send out basically another survey once it does get updated to allow you to answer yes. And we do track who is kind of engaging with EN service regarding making updates so they can complete the employment verification. So if you are having like particular issues where the portal is not updating and you're kind of running up against that deadline, we will take that into consideration. So, but I'll definitely take that feedback back and talk with the team about it as well. As far as the portal and displaying that historical information. I can't answer whether or not that's something that we could possibly update, but I will talk to that team and, you know, let them know that it can be a lot to look at.

**Amy:** Yeah. Thank you. I appreciate that. Even if it was just the most recent. Yeah. Or a spreadsheet. But anyway, thank you so much. My other quick question is around suitability, but not suitability. Excuse me. Getting portal access. So I know I have -- I'm kind of at a loss at this point and I would like to see who in social security can help us for a staff person who is already suitable. We've gone round and round with EN services and we have -- we've gone to the local Social Security office. We've spent hours on the phone with Social Security nationally, and we cannot get her the access she needs the extra security in order to be able to get in the portal. And in order to do her job, she needs portal access. So I really need someone who can actually help us with that. And I'm wondering if you have a recommendation.

**Erinn:** I'll reach out to you after this call and we can discuss further just because that's very specific.

**Amy:** Yes, it is. Thank you so much. Thank you.

**Erinn:** Sure.

**Katherine:** Thank you, Amy. We have one more raised -- well, we actually have two raised hands. Ana?

**Ana Morales:** Yeah, let's go ahead.

**Katherine:** Karma, your audio is active. Do you want to unmute and ask your question, please?

**Karma:** All right. Can everyone hear me?

**Ana Morales:** Yes.



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**Karma:** Okay. Great. Great. I wasn't quite sure, I'm using a different computer at the company right this second, but okay. So I appreciate the information on the TPA change forms and indicating intent to a specific role. I needed that piece of information. The other -- the part of my question I have is that I plan to take a little bit of time in October. And when the tri-annual employee verification comes through, I want to make sure that my Signatory will be able to respond to that. And what is the deadline so I can give her a heads up?

**Erinn:** So we do not have the specific start and end date for that collection period for the October employment verification yet. We will send out a delivery message before the process starts, letting you know that it will start. If you receive that and you know that you're going to be out of the office and you need somebody else to receive that link, I would suggest reaching out to EN service and making us and making us aware of that so that we can ensure that the link goes to the right person.

**Karma:** Okay. Thank you. Great call, by the way.

**Ana Morales:** Thank you, Karma. Ana, we have Sandra Abbott. Sandra, you have access to your audio.

**Sandra:** Can you hear me, ma'am?

**Katherine:** Yes. I hear you.

**Sandra:** Okay. My question is -- I have two, actually. I've been reviewing my cases and I have been unassigning beneficiaries in the portal. I go back and I found two already that they were unassigned, but it's not showing under, I think, cases or individuals that were formally assigned in the portal. So how do I get that fixed? And then the second question is, if, because I've noticed under the audit that I was using the Ticket date for assignment versus the signature date of the beneficiary, how can I update those changes and how can I find out if they've been updated or approved or denied?

**Ana Morales:** So I know -- Sandra, this is Ana. I know that for your second question -- Mary Kay just typed it in the chat. So Mary Kay advised you to send it directly to [programintegrity@yourtickettowork.ssa.gov](mailto:programintegrity@yourtickettowork.ssa.gov) and they will address your question. Now, for your first question, it's also very specific to the portal itself. Have you tried to contact the help desk for assistance?

**Sandra:** Well, you can -- EN services?

**Ana Morales:** No. Not EN service. The systems help desk. I believe it's EN systems or Sharday, if you are on the call, what is your help desk?

**Brittney:** Can post it in the chat for you.



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**Ana Morales:** Yeah. They can post it in the chat.

**Sharday:** Hi, Ana. Yes, correct.

**Ana Morales:** Oh, there you go. Okay. So yeah, if you reach out to them, they will help you to see what you're trying to see or tell you where is that information exactly.

**Sandra:** Okay. All right. Thank you.

**Ana Morales:** Thank you, Sandra.

**Katherine:** Thank you, Sandra.

**Ana Morales:** Do we have any more raised hands? Okay. All right. Brittney, do we have any other question in the chat? I don't believe we have. All righty. So on behalf -- we can go to the next line. On behalf of our presenters from Social Security and the Ticket to Work -- Ticket Program Manager team I would like to thank you all for attending and engaging in this quarterly call.

As we have on screen, our next All EN Call is going to be on November 19th. You can send topics or suggestions to [ENOperations@yourtickettowork.ssa.gov](mailto:ENOperations@yourtickettowork.ssa.gov). Our upcoming events, we have the WISE webinar. Working for yourself with Ticket to Work, please share that information. And we also have EN Essentials on October 9th that will be Connecting the Dots when Serving Youth and Young Adults. So we hope to see you all on our events. We have a link of the calendar of events for you to check out. And we also want to remind everybody that the Ticket Program communicates important information with service providers through GovDelivery messages including Ticket Portal issues and outages. So please save the email that is on the screen, so that these messages don't go through your spam or junk email boxes. And that inbox is [Tickettowork@subscriptions.ssa.gov](mailto:Tickettowork@subscriptions.ssa.gov).

So with that, we want to thank everybody again for your attendance, and have a good rest of the day. This All EN Call has concluded.

