



# QUARTERLY ALL EN CALL TRANSCRIPT

## SEPTEMBER 29, 2025

**Derek Shields (Moderator):** Welcome to today's quarterly All Employment Network Call. My name is Derek Shields, and I'll be serving as the moderator for today's call. We welcome you and appreciate your time to check in on updates for this quarter. Before we begin, we will be reviewing our agenda and a few specific logistics. I'll ask Rose to bring the presentation back up, and I'll review those to get us going. The slides are up, and let's go forward, please.

Thank you. First, this meeting is being recorded, and a transcript will be provided. Per the Ticket Program Agreement, Part 3, Section 11, Subsection I, EN staff are not permitted to record this meeting nor capture the transcript. Closed captioning is available for participants who are joining using the MS Teams application or by using a separate caption link that will be provided through both the GovDelivery email announcement for the call. You do have those options. To turn on closed captions in MS Teams, please go to the three ellipses at the top of the MS Teams window. Click on "More" and go down to the language and speech option. There, you can select "Turn on live captions." Or if you prefer to use the link option provided in chat or email, paste the link in the browser of your choice, and it will open a separate window for you to follow the closed captioning. Next slide, please.

Continuing with our logistics, please feel free to ask questions today in the MS Teams chat section. There will be two live Q&A sessions today. We appreciate your participation. If you're joining via telephone and wish to ask a question, there's two steps. Please raise your hand using star -five; you'll be unmuted and called upon by the facilitator. Via telephone, the second step is you need to press star- six to speak. If you're joining through the MS Teams application and wish to ask a question aloud, please use the "Raise your hand" feature, and your mic will be unmuted, and we'll call upon you. Please submit your questions one per participant. Additional questions or comments can be sent to us via email at [enoperations@ssa.gov](mailto:enoperations@ssa.gov) . For any questions not answered during the live event, we will forward those to the appropriate panelists or our colleagues at Social Security for responses and be sure to get those back to you. Next slide, please.

As I mentioned, I'll review the agenda and then we'll shortly begin with our presentations. Today, we'll hear from Katie Seymour on reinstating Medical Continuing Disability Review protection to Ticketholders . Following Katie, we'll welcome Rachel Vincent. Rachel will present on the new SSA-821 form, this is the Work Activity Report. And following Rachel, we'll immediately have a Q&A session, so you can bring forward your questions on the new SSA-821 form for Rachel. After that Q&A, we'll welcome Erinn Wiedman to talk about a couple of specific Social Security updates. Following that, LaKesha Hunt Dickens will join us from the



Ticket Program Manager to provide some Program Integrity reminders. And our final presentation will be Jayme Pendergraft from the Communications and Outreach team and will provide a few specific updates and upcoming events. We'll close out with the second Q&A session for all of our remaining presenters. That's our agenda today. Before I introduce Katie, let's go to the next slide, please.

We are delighted to welcome several new Employment Networks to the program. For this quarter, we have 11 new ENs to welcome. We'll start out with a group from Texas. We have Total Rewards Partners, Inc., Vaughn Gage Center, and Dominion Placement Services LLC, all from Texas, joining the program. From Virginia, we welcome Benefits to Work LLC. From Washington State, we have two new ENs, the University of Washington Neurology Vocational Services Unit and Achieve Consulting Team, Inc. From Idaho, we welcome Transitions, Inc. From Kentucky, A1 Job Development Services Corp. From New Mexico, Life Roots, Inc. And two from New York State, the Oswego County Department of Workforce Development and Lincoln Square Coaching LLC. We look forward to working with all of these new ENs to support more Ticketholders in their employment journeys. So thanks for that and welcome, everybody.

And let's now turn to the next slide. It is now my pleasure to introduce Katie Seymour, our first presenter today. Katie is with the Disability Policy and will be providing information on reinstating Medical Continuing Disability Review protection to Ticketholders. Katie, over to you, please.

**Katie Seymour (SSA):** Hello. Good afternoon, everyone. Ticketholders actively participating in the Ticket to Work Program receive protection from medical Continuing Disability Reviews or medical CDRs while they are using their Ticket. When we say actively participating, we mean that they are achieving specific work, earnings, or education goals. A recent review of all Ticketholders assigned to Employment Networks identified over a thousand Ticketholders at risk of being selected for a medical CDR due to a prior timely progress review failure. Our goal with your assistance is to restore medical CDR protection to Ticketholders actively working towards self-sufficiency. We will be sending guidance on how you can assess your Ticketholders who are not currently protected from medical CDRs. The first step, which you can start now, is using the list of beneficiaries currently assigned to me in the Ticket Portal to identify Ticketholders whose last TPR status is F for failed.

As a reminder, in order to see your entire list of Ticketholders, you will need to download the list to Excel. The number of Ticketholders in a failed TPR status varies by EN, so I recommend pulling this report at your earliest convenience so that you can see how many of your Ticketholders are not currently protected from medical CDRs. While we will follow up soon via email with guidance on how you as an EN can assist your Ticketholders, I want to remind you that Ticketholders who have failed TPR and want to take immediate action can always contact the Ticket Help Line by calling 1-866-968-7842. I believe they're going to put that in the chat or



emailing TicketToWork — all one word — [ENService@ssa.gov](mailto:ENService@ssa.gov) and apply for re-entry at any time. Derek, back to you.

**Derek Shields:** Katie, thank you very much for this update on reinstating medical Continuing Disability Review protection. And our team will drop that information into chat shortly. And with that, we're underway. After Katie, we now welcome, on the next slide, Rachel Vincent — also with Disability Policy — to present on the new SSA-821 form, the Work Activity Report. And with that, we're going to bring up the form itself and ask Rachel to begin her presentation. Rachel, the form is up. Rachel's calling in today, everyone. So just so you know, she'll be giving guidance, and Rose and her team will be moving the form. But, Rachel, the form is up on the shared screen. Over to you, please.

**Rachel Vincent:** All right. Thank you. Sorry, everybody, I was having some technical difficulties, so I can't actually see what's happening. But we're going to figure something out here. So I just wanted to go over a few of the changes that we made. We did make substantial changes to the form. A little bit of background on that is we have gotten feedback that the form is... people don't understand it. Maybe it's too much information, etc. And what we did is we actually solicited feedback from a handful of WIPA project directors about different pain points that their clients have, things that they would like to see updated on the form. In addition, we had an internal work group, and we sent it out to all of our technicians — not all of them, but to the different regions that represent their technicians to give us feedback as well. The form then was vetted through the Office of Management and Budget, and now, a year-and-a half later, has come back to us and is finally published. So I just want to go through some of those changes. You know, this is a form that can be obtained via upload documents through a Social Security account so that an individual can submit this electronically.

But as far as the changes, first is the cover letter, which is page one. And on this — on the cover letter, what we did is we added the types of information that we are requesting, the reason that we're requesting, how we're going to use the information, and we gave a definition of Work Incentives because we want somebody to know right up front, these are why they are important to let us know about.

And next, we will go down to the identification section, which is on page three of the form. And on this section — or on this piece, we added an SSN option. And the reason we did this is because if somebody right now will upload documents where you can submit it electronically, the form is going to come to the individual or be accessed by the individual as a blank form; nothing will be populated on it. And, of course, most people don't know what their BNC is, so we added an SSN that they can add on that when they're submitting it to us. Also, if it's a blank form, the date to be completed by SSA, that's not always going to be pre-filled for them. So, we came up with a default that if that's not on there because they've accessed it themselves, to give us that information for the last two years, we felt like that was a substantial enough



amount of time since the prior review, etc., to be able to get the adequate information that we need.

All right. So, then we have question three, which shows up on page four of the form. And under 3A, we added on there the reason work ended in a checkbox because of my disability or another reason. And, one thing that we think that could help with is for our technicians to develop an unsuccessful work attempt to see if maybe there's a period of work that we can disregard when we're making an SGA decision. And if you go down just a little bit further under that there's a box right before 3B that says, "I'm enclosing or have already provided pay stub information." Now, this section used to have a table, and it said above the table, "Please include your pay stubs or fill out this table," where the individual was expected to go in and monthly calculate their benefits and put it in a table. It was by far the number one pain point that came to us from the WIPA project directors.

You know, especially with the My Wage Report, folks may have already submitted all their pay stubs online. They may have brought them into the office. They may not remember what they made or have access to that. And the folks that responded said that that was too overwhelming for folks. Either they were like, "Why am I doing this again?" Or it made them feel overwhelmed that they didn't have the information, and they would just choose not to continue filling out the form, and they'd stop there and just never send it in. And so we got rid of the table because most of the time, if somebody is going to submit pay stubs, they just send in receipts of those pay stubs, etc. So we got rid of that table altogether.

And then let's see here. On question 4, if we scroll down to halfway down page 5, we updated this with an example of what we mean and why we're asking for the information. And so, this is about income that's in addition to your income that you are receiving. So maybe something outside of what is shown on that pay stub, potentially tips, a bonus, vacation pay and disability pay, sick pay — explaining that those we may not count, because, of course, we want people to tell us about those types of pay, because we might be able to deduct it when we're making an SGA determination and actually make that a continuous month rather than a cessation month. So, we tried to explain that a little bit better.

And then if we scroll down to question 5 on page 6, we added some checkboxes about accommodations and space to provide that information. This is about subsidized work, subsidies, and special conditions. And one thing that we did is on 5B, we talked about someone other than your employer and allow them to tell us about that. That's actually 5C, sorry about that. 5C if you scroll down to page 7. It allows us for somebody outside of their actual employer to tell us about this. And as you can see, we talk about Employment Networks, Community Work Incentive Coordinators, job coaches, folk rehab counselors, and so that was an addition that we added to this form that we were pretty excited about. And we also updated the form SSA-3033. That's the form that actually goes out to the individual that's listed in this section, that gives us information about their potential subsidy or special condition at their work. And so



what this does is if they put that person's name down here, we can call that individual or mail that form to them and get all of that information that is on that 3033, so that we're not just left with an employer's name, and it's going to a corporate office and nobody has direct knowledge about that person's special situation.

Then, if we scroll down to 6A, which is at the bottom of page 7, again, we clarified why we're asking for the information about this substantial work. But in short periods of six months or less, explaining that we might be able to — that we're not — we may not count those earnings in order to say, "Hey, this is something that's actually helpful for you to tell us about; this could help you to continue to get benefits." And so we tried to make some — on 6B some simple checkmark boxes to make that a little bit easier.

And then for question 7, which starts at the bottom of page 8, this is the Impairment-Related Work Expense questions. Again, we clarified why we're asking for the information and how providing that information to us may help them. And then if we scroll down to page 9, we added a continuing column on 7B in that graph. And that makes us — let us know it's a continuing Impairment-Related Work Expense that we can go ahead and project out over a certain amount of months. So those are just some of the changes that we made to the form. And with that, again, I can't see any remarks in chat or anything like that. So I'm going to pass it back over to you, Derek.

**Derek Shields:** Rachel, thank you so much for walking us through the updates to the SSA-21 form, and thanks to Rose for following along on the screen. So at this time, we're going to go back to the slides and bring them up and introduce our first Q&A session. And as we do that, I'll just mention, Lori just dropped a comment in chat, "Much improved, thanks." We do have some questions for Rachel that are in chat, and we'll go through those in a moment. Just as a reminder, there's different ways to participate in the Q&A session. First, through MS Teams, you can enter a question or comment into chat. Or you can use the "Raise Your Hand" feature, and we will unmute you and call upon you. If you're with us via telephone, use your "Raise Your Hand" feature by dialing star five. We'll then call upon you and ask you to hit star six to unmute yourself and speak. So with that, I'm going to work with our colleagues, Britney and Krista, to call out the questions that are coming in, and feel free to use the "Raise Your Hand" feature. So, Britney, we've had a few comments and questions for Rachel on the Form-821. Anything that you could call out to start first, please.

**Ana:** Hey, Derek, this is Ana. I'm going to cover for Britney today. The first question that we have for Rachel is, "Will the SSA-821 form be available for electronic submission again?"

**Rachel Vincent:** It actually is available for electronic submission via *mySSA*.

**Derek Shields:** So this is Derek. Just — to just to check on that. So the new form replaced the old form and remains available for submission through the *mySSA* app.



**Rachel Vincent:** Well, you can just go on to your account, *mySSA*, and you can submit the form electronically, but also — so it's slightly different than the old E821 that was discontinued about a year or so ago, and this is behind the actual *mySSA* account. And just to reiterate, though, this is typically not a self-initiated form. This is a form that if and when a technician needs the information, they can send a link, an electronic link to the individual to fill it out, and it will electronically go back to the technician that requested it, which is so most of the time people shouldn't just be self-initiating the 821 unless Social Security has explained that they need that information. So if we start to have pay stubs that equal SGA amounts, etc., then an SSA technician will start a work review, and then they will be the ones that initiate the 821 for the most part and they can do that electronically through that link. And then that link comes to them and it gets bounced back to the technician that sent it.

**Derek Shields:** Thank you, Rachel. Let's go back to Ana for another question or comment from chat. Ana?

**Ana:** Yes, we have Amber Litfor asking, "Can we submit the 3033 ahead of time with the 821 rather than waiting on SSA to send it to the third party?"

**Rachel Vincent:** Well, a couple of thoughts about that is that if it's not SGA work, then we wouldn't need it. So it could be that somebody is taking their time to do something that Social Security doesn't necessarily need. And when we do say ahead of time, I'm just trying to think about how that would work. Like, so you have somebody that you're working with and they have received an 821 from Social Security, and you want to go ahead and fill out the 3033 and send that back with the 821. I suppose somebody could do that, but we wouldn't want that to hold up somebody getting their 821 return, because like I said before, it may not be relevant to the decision that we make, and now we've just taken all that time — or you've taken all that time to give us this subsidy information that may not have been necessary. So I suppose you could, but I think that just logistically speaking, I'm not sure that that would always work perfectly.

**Derek Shields:** Thank you, Rachel. Let's go to our raised hands now. Krista, it appears we have somebody with a raised hand.

**Krista:** Yes, we do, Derek. I have Amber. Go ahead and unmute your mic and ask your question.

**Amber:** Actually, Rachel, this is the one that asks about the spending in the 3033 ahead of time, and it's... exactly, I don't do it unless they are above SGA. I've had several beneficiaries whose work reviews have been routed to Baltimore and Boston, and we've submitted the 3033. The local field office actually shows the 3033 in the file but then Baltimore has come back and said, "Hey, you're over SGA, now we're stopping your check, and you've been overpaid by \$100,000." It's actually happened last year. And we've had to go round and round with that. So that's why I wasn't sure if submitting the 3033 with the individual's 821 would be suffice to try to prevent a lot of that from happening.



**Rachel Vincent:** Okay. So it'd be a situation where you have — that your client is above SGA. They've received 821, potentially from the Baltimore offices that do 50% of the reviews. And you would like to just add the 3033 in the mail along with the 821, is that what you're saying?

**Amber:** Correct. Yes. Yes, exactly that.

**Rachel Vincent:** There's nothing to prevent you from doing that, but I think the question would be — it's supposed to be a form that — the 821 is going to the individual to fill out. And then all of a sudden, they have a form filled out by somebody else in there, too. I don't know. I think that would be fine. But I — again, it's just not typically how it works. They usually only ask for it if and when they know that it's going to result in an SGA determination. So I suppose you could. Yeah

**Amber:** Yeah, I only do it, like I said, if I know that they're over SGA and they have legitimate subsidies, and that's why — again, when I saw the option for CWIC, my team and I have pretty much screamed in excitement that we were now able to start validating for these individuals, too, that we are working with. So, thank you.

**Rachel Vincent:** Yep. Thank you.

**Derek Shields:** Thank you, Amber. Krista, let's stick with you. Another raised hand, please.

**Krista:** All right. Next, I have Alisa. Go ahead and unmute your mic and ask your question.

**Alisa:** Hi, there. So, my name's Alisa Tease, I'm with Gen X Services Employment Network. We have several Ticketholders whose suspension is coded as not due to work and earnings, which is incorrect. And since we're being told really not to initiate the 821, as a result, we have these Ticketholders that are at risk of being denied beneficiary reinstatement if needed. And of course, as an EN, we're unable to invoice for. It's coming on like a couple of years of milestones and outcomes. On our last payments call, Nicole Black suggested that I try to work with the AWICs to have these issues resolved. The Ticketholders, local AWICS, many of them, their phone numbers are now showing as non-working. Are there any other resources that we can utilize that would be helpful in having these issues corrected? And then also with 1099 earnings that are not showing as established. Is there any other resource that we can work with to have these issues looked at and corrected?

**Rachel Vincent:** I don't think that one's for me, Derek.

**Derek Shields:** Yeah. So, this is Derek. Well, very important questions. I think we could bring that back up in our second Q&A. It's not directly related to Rachel's updates on the 821. I understand, Alisa, it's important to you and probably to others listening. So if we could bring that one back with our next Q&A, we'll bring in our colleagues from Social Security to provide some suggestions there.



**Alisa:** Thank you.

**Derek Shields:** You're welcome. I see Justin has a question. Krista, unmute the line for Justin and have a question for Rachel on the 821.

**Justin:** Hey, yeah, good morning. So, yeah, I actually had a question regarding the changes going from the — I think it was a 2023 version — to the now 2025 version. Since this is a form that would normally go to the beneficiary, how, I guess, how easy is it to fill out now? Because I know that I've had a lot of people reach out to my program asking for assistance filling it out. You know, I don't know what this is. I don't know if I filled it out correctly, and they're missing more than half of the information, the relevant information. How much easier is this version compared to the old version in making it actually doable by the beneficiary on their own?

**Rachel Vincent:** Right. So, unfortunately, the laws are written in such a way that don't make work reviews easy. And Work Incentives and all of the rules regarding them are complicated. So there's only so much you can do, given the complicated rules. So what we tried to do is aim at a few things that we were told by the program managers that were pain points for their clients, specifically, like that pay stub table that previously they felt like they had to go through and put in every single month of their earnings. We took that completely out.

We tried to explain to them what a Work Incentive is and how it can be helpful to them, so that they knew that this was a good thing that they were telling us about and not something that was getting them in trouble, etc. We updated the form so that if somebody did get a blank form, that it wasn't so confusing. So while we certainly couldn't simplify the form as much as we'd like to, because the law really ties our hands, because we have to ask about Impairment-Related Work Expenses, unsuccessful work attempts, subsidies, special conditions, and special pay. Those aren't easy to try to translate. And so we've done our best. I can't tell you exactly — I can't quantify that, but I can tell you that the things like getting rid of that pay stub table that we know were known pain points to the clients.

**Justin:** I guess I asked because we have a lot of people, not just my own EN, I'm sure others too, working with people who have intellectual disabilities, and they may or may not have someone who can be there to help them fill it out — whether it's a family, friend, a caretaker or whoever in filling it out. So, I mean, were there attempts to test it, like practice and see, oh, does this person understand what this language means because it's the legalese of Social Security. But was there any testing involved in giving it up and running?

**Rachel Vincent:** We did not have usability testing done. For one, we just simply — before the form was up for review, it took us a year-and-a-half just to get this far. So, there was not testing, if that's usability testing, if that's the question.

**Justin:** Thank you very much.



**Derek Shields:** Thank you for the question and the comments there. And let's circle back to Ana for one last question from chat before we move on to our next presenter. Ana?

**Ana:** Yes, Derek, we have a comment and a question from Kevin Nickerson. "If SSA does not request work reviewed timely, it was good to have that option online for beneficiaries to bring to life that they continue to get paid while working gainfully. How can we get SSA to send the 821 form if it has not been sent when the beneficiary is beyond the Trial Work Period, perhaps even the grace period, and they should not be in pay any longer. This is a routine issue for our beneficiaries. How can we help move this along?"

**Rachel Vincent:** Okay. I think that part of that question might be for me. I'm not sure all of it. But we do work — they are working the reviews. You know, we do have resource issues, of course. And I understand that it's maybe frustrating that you have somebody that is in pay. We do have the ability to ask for a voluntary suspension. That is a route that an individual could go. But one thing that you can do is encourage your folks to sign the SSA-8240, which is the data exchange agreement. What we're doing with that and the My Wage Report is those earnings go directly into our system's pay stub table. And we have a system behind the scenes that analyzes all the earnings in that table and selects a case when a work CDR needs to be done and routes that alert to a field office technician to work. And so, I would stress having folks fill out that 8240 if their employer does participate in a data exchange and also, if they can use My Wage Report if they don't have that, because that guarantees those pay stub amounts go directly into the pay stub table in our system. And that our system analyzes those beneficiaries liable for work.

**Derek Shields:** Thank you, Rachel. I appreciate that. Ana, any final comment from chat or question before we move?

**Ana:** Yeah, just sharing with Rachel that there are several comments from ENs thanking for the work on improving the forms and all the efforts. One comment is, "This new version is much easier. If an EN assists their clients completing it, our EN deals with this many times, and this revised form is 100% easier." I just wanted to share with you.

**Rachel Vincent:** Oh, that's great news. Thank you so much.

**Derek Shields:** Thank you, Ana. Now, I do believe, Rachel, you're going to be able to stay with us through the remainder of the call.

**Rachel Vincent:** I am here until 2.

**Derek Shields:** Okay. Well, thanks for that. We'll be moving forward to our next presenter, and hopefully, we'll begin our next Q&A session before we have Rachel leave. So thanks for your questions and all of your comments. We will capture the comments and questions in chat and provide those to Social Security as well to ensure that they have the different perspectives that have been shared. And with that, Rose, let's proceed to the next slide, please.



At this time, I am pleased to welcome Erinn Weidman from Disability Policy to provide some Ticket Program updates. Erinn, over to you, please.

**Erinn Weidman:** Good afternoon, everyone. So I have some information to share regarding the upcoming employment verification process and a few reminders on documentation procedures. So on October 6, we will begin the third and final employment verification process for the 2025 calendar year. The employment verification process ensures that SSA has up-to-date contact information and ensures portal users maintain access to the Ticket Portal.

It is important that you complete the employment verification before the deadline, which will be October 15. Failure to complete the employment verification for the deadline could result in your portal users being locked out of the portal. So we will send more information on the October employment verification process soon, so keep an eye out for a GovDelivery message.

And then next, to ensure compliance, please keep the following documentation and submission procedures in mind. So when submitting suitability documents, please remember to cc EN Service on all correspondence. This helps us maintain accurate records. Whenever you do submit a suitability application to the Suitability Office, you must also send a separate email to EN service with an SSA-222 form and a TPA change form to add the employee. This step is essential for proper EN employee tracking. And to remove an employee, you also need to send or submit a TPA change form to EN service. If the employee is the main point of contact, please also provide a suitable replacement. And then please confirm that you're using the correct email addresses for both EN service and the SSA Suitability Office.

The Suitability Office address recently changed. For the updated address, refer to the GovDelivery message that was sent out on July 30 titled "New Email Address for SSA Suitability Office." And finally, we ask that you always include your PID and EN name in the subject line of all emails. This helps us quickly identify and process your request. That concludes my updates and reminders for today. So thank you for your attention and cooperation. Back to you, Derek.

**Derek Shields:** Thank you so much, Erinn, for the update on the October dates, October 6 to October 15, for the employment verification and the other important EN service reminders. Erinn will be back with us in just a little bit for our second Q&A. At this time, let's go to the next slide, and I will introduce LaKesha Hunt-Dickens. LaKesha is with the Ticket Program Manager, Program Integrity team, and she has some Program Integrity reminders for us all. LaKesha, over to you, please.

**LaKesha Hunt-Dickens:** Thank you, Derek, and hello. So, as Derek mentioned, I will be providing the Program Integrity reminders and process overview related to the EN annual services and supports review. Next slide, please.

So Program Integrity strives to schedule and conduct the annual Services and Supports Reviews within the same month of the EN TPA award. Prior to the review month, an email is sent to the



Signatory Authority and the Program Contact on file to remind the organization of their upcoming review. The email should come from the Program Integrity inbox and should have the email signature of the Analyst assigned to conduct your review. At the start of the review month, the actual document request is sent via GSO to the EN POC on record with GSO access. The request contains a due date for the documents. And if the documents are not received within the timeframe identified, a non-responder email is sent to the signatory authority and the program contact to remind the organization of the need to submit documents. If the EN is then non-responsive and documentation is not received within the following five business days, the request is escalated to SSA for a potential cure notice.

Now the next slides, I'll go over some more specific dates. So, as I mentioned on the first slide, the document request is sent via GSO. The email contains the Ticketholder names, the SSNs, and a list of documents required to complete the annual review. The EN organization then has 10 business days to submit — 10 business days from the date of the request to submit the document via GSO or fax. The required documents may include the Individual Work Plan, which we will refer to as IWP, case notes, and discussion summary.

When submitting the IWP, please ensure to submit all pages of the fully executed IWP, which contains the Ticketholder and EN suitable staff, signatures, and date. If the discussion summary is not embedded within your IWP, the EN should also submit the discussion summary as a separate document. Another required document is the case notes. The case notes are vital and verifying that the services reports listed in the IWP are provided and that there is two-way communication with the Ticketholder. When communicating with the Ticketholder, the case notes should reflect the date of the communication, the method of communication, such as a phone call, a text, an email, and also the services discussed during the communication or meeting. Case notes should cover the 12 months prior to the review month and year. Next slide.

Now that your EN organization has received the request and pulled the requested documents, the next step will be related to submitting the documents for TPM Program Integrity review. Again, this package should be submitted within the 10 business days from the date of the initial request. For ease of submission, please reply directly to the GSO request. It is not necessary to create a new GSO message. GSO is a secure platform for PII, so there is also no need to encrypt or password-protect the attachments. A separate file should be attached for each Ticketholder SSN. Although not required, we do recommend that each file has a naming convention to include the Ticketholder name. This naming convention allows the sender to verify that all the requested files are attached, and also it assists the analyst in confirming all the requested SSNs have been received. We ask that you do not combine Ticketholder information in the same file. Okay. Next slide.

So, as we wrap up the process overview, I just want to reiterate some of the importance of submitting IWPs that are fully executed documents that contain both the Ticketholder and EN



signature and date. A compliant signed IWP should either be signed via a wet signature and/or a digital signature. The wet signature is a physical handwritten signature, while the digital signature is an electronic signature with a digital ID and timestamp. Examples of software applications that provide a digital signature include DocuSign, Adobe Acrobat Pro, and Adobe Acrobat Sign. For case notes, ensure to provide notes that cover the prior 12 months. It is recommended to regularly review the Ticketholder's status to verify the Ticketholder is meeting their goals and to ensure the two-way communication is maintained. Lastly, prior to submitting the discussion summary, the documentation should include, at a minimum, details of the initial counseling session and discussions around the development of the IWP. Once you have verified all the following information, we request that you then submit your document via GSO, again, associated with the initial email request, and/or fax. And that's it. Back over to you, Derek.

**Derek Shields:** Thank you, LaKesha, for these Program Integrity reminders and updates, and we'll have you back in just a little bit for our second Q&A session. We'll now proceed to our final presentation. I'm now pleased to welcome Jayme Pendergraft with the Ticket Program Manager for her update on communications and outreach. Jayme, over to you, please.

**Jayme Pendergraft:** Thanks so much, Derek. And hello, everyone. Can we move on to the next slide, please? I'm going to start us off with an update on our newsletter. On July 29, TPM reintroduced the Ticket Connection, which is a quarterly e-newsletter designed specifically for service providers. This relaunch marks the renewed effort to keep ENs informed and engaged with timely updates and resources. Our summer 2025 edition of the Ticket Connection was sent via GovDelivery, and included valuable content like —

**Derek Shields:** Jayme, sorry to interrupt. While we can hear you, your voice is a little soft. And a couple of people have asked for you to increase the volume. So if that requires you leaning down, go for it.

**Jayme Pendergraft:** I will try this. How is that?

**Derek Shields:** It's a little bit better. Try a little bit more. Now you're on mute.

**Jayme Pendergraft:** Any better there?

**Derek Shields:** That is improved. Increase your volume and get back to your presentation. Thank you.

**Jayme Pendergraft:** All right. Thank you. So our summer 2025 edition of the Ticket Connection went out via GovDelivery, and it included valuable content such as policy updates, training opportunities, marketing materials, and info about upcoming events. The fall edition is scheduled for early October. And we'll continue to deliver insights and tools to support you in your work. If you have any ideas for future editions of the newsletter, please contact us at [enoperations@ssa.gov](mailto:enoperations@ssa.gov). And, Derek, before we go to the next slide, I just want to say if I get really loud, please do interrupt and let me know, and I'll start talking more softly.



**Derek Shields:** I will. You sound better. Thanks, Jayme.

**Jayme Pendergraft:** Good. Next slide, please. Thank you. Now I'm excited to share our newest success story. Frances is a registered nurse who returned to work after experiencing a stroke that left her unable to drive or read for several years. With support from the Ticket to Work Program and the Choice Group, she regained independence and successfully re-entered the medical field that she loves. We're always looking for new leads. If you do have a success story lead, contact [ttwstories@ssa.gov](mailto:ttwstories@ssa.gov), and the link to our Success Story page has been posted in the chat, and I encourage you to go take a look. Next slide, please.

WISE Webinars, they typically take place on the fourth Wednesday of every month and offer valuable insights into the Ticket Program. They're a great way to stay informed, connect with experts, and explore tools that support the journey to financial independence. In 2025, WISE Webinars continue to see record-breaking engagement with almost 15,000 registrants and 5,398 attendees, which is a clear sign of our audience's growing interest and the impact of these webinars on Ticketholders. Our October WISE titled "Ticket to Work: Support on Your Employment Journey" is on October 22 from 3:00 to 4:30 p.m. We'll be joined by a guest from Social Security who will discuss the Payroll Information Exchange and its benefits for Ticketholders. Then, on November 19, we'll host "Ticket to Work for America's Veterans." As always, we appreciate your help in promoting the WISE webinars. You really do make a difference. We're seeing this great, great registration, and we really thank you for your help, and we encourage you to continue sharing our social media and other webinar announcements.

**Jayme Pendergraft:** Next slide, please. After noon, I thought I would do something a little different. I wanted to share some insights from our recent social media performance that might spark ideas for your own outreach efforts. These trends highlight what's resonating with our audience and could help guide your promotional strategies. Each month, our WISE Webinar promotional messages consistently rank as our top-performing posts on both Facebook and X, demonstrating the value of timely, informative content that connects directly with our audience.

In addition to webinar promotions, wage reporting reminders, and video content have proven especially effective in generating interaction and shares. These formats help simplify complex topics and encourage users to take action. On the Choose Work blog, "Discover Who's Hiring Now" remains the most viewed post month after month, highlighting the demand for real-time job leads. Other high-performing topics include reasonable accommodations and straightforward job search advice, which resonate with readers looking for practical support and guidance. By sharing this information, we aim to support your outreach efforts by highlighting the topics and formats that consistently perform well for us. Using proven content strategies can increase engagement, build credibility, and strengthen your connection with the audiences you serve. We encourage you to leverage our social media activity to help fill your



own calendar. Save time by using what's already working to reach your audience more effectively by liking and sharing our posts. Next slide, please.

We encourage you to share program updates, success stories, and resources — or you will see us share program updates, success stories, and resources on social media. And you can follow us and tag us on Facebook at Choose Work! and X at Choose Work! SSA. As I mentioned earlier, if you know someone with a compelling Ticket to Work success story, we'd love to hear about it. Submit leads to [TTWStories@ssa.gov](mailto:TTWStories@ssa.gov). Just remember not to include any personally identifiable information in there. One of our team members will reach out to you for additional details. If you have an idea for a future blog post or something to share on social media, let us know. We welcome your suggestions. Email your ideas to [ttwsocialmedia@ssa.gov](mailto:ttwsocialmedia@ssa.gov) and help us keep our blog and our social media content fresh and relevant. And now, I will hand it back over to Derek.

**Derek Shields:** Thank you, Jayme, for the Communications and Outreach team updates. And appreciate the comment about the higher levels of engagement and acknowledging all ENs that are helping get the word out. The registration for the WISE is unprecedented, and we appreciate everyone's assistance in making that possible.

With that, let's go to the next slide, please. As a reminder for our second Q&A, you have a couple of ways to participate. Through MS Teams, you can use the "Raise Hand" feature or enter your question or comment in the chat. By telephone, two-step process, star-five, we'll call on you and then hit star-six to speak. And with that, let's check in with Krista to see if we have a raised hand. Krista?

**Krista:** I was going to say we had a raised hand, but they lowered it.

**Derek Shields:** Okay. Oh, there it goes.

**Krista:** Oh, wait. Hang on just a moment while I get her promoted.

All right, Alisa, you are — your mic is enabled. Go ahead and unmute yourself and ask your question.

**Alisa:** Thank you. So I'm coming back because I asked this question after the first — on the first Q&A. I was told to bring it back up on this one. So my name is Alisa Tease. I am an Employment Network with Gen X Services. We have several Ticketholders whose suspension is coded as not due to work and earnings, which is incorrect. We also have several 1099s who have submitted their tax returns, and it was confirmed that Social Security received them as a result, but they're still not showing earnings established in the system. So in one case, the Ticketholder's being — has a risk of being denied for reinstatement if needed, if their suspension is miscellaneous. Also, we as an EN are unable to invoice for service — for the services that we provided for sometimes up to two years for both issues. On our last payments call, Nicole Black suggested that I try to work with the AWICs to have these issues resolved. The Ticketholders that I'm



referring to, their local AWICs' phone numbers are now non-working, or their extensions are not valid. Are there any resources, any other resources that we can utilize that would be helpful in having these issues corrected?

**Derek Shields:** Thank you for bringing the question back, as Rachel wasn't prepared to respond to that one. I would ask if a colleague from Social Security would like to address that. While it's on the edge of the payments call material, I want to make sure that the question has a chance to be responded to. Mel or Natalie, any thoughts for this question?

**Melanie:** Hi, Derek, this is Melanie. Sorry, go ahead, Nat. I was just going to mention, Derek, I don't think we have the appropriate people on this call. I would just — Alisa, if you could just send your question directly. Derek, I don't know if you can put up on the screen where we're gathering questions if they're going to EN operations. I will say, for everyone, if you're finding that information is outdated on our websites, whether it has to do with AWICs or other contacts, as everyone is probably aware, we've had a ton of staffing changes, a lot of reorganizations. So information is constantly getting updated, but there are still some sources that haven't been updated. So anywhere you can share the specific reference in terms of the website, or the particular AWIC, that's helpful, and we can pass that along to our colleagues in operations. But for the other question, if you could send it in writing, we'll make sure that we can get you an answer, Alisa.

**Alisa:** Thank you.

**Derek Shields:** Thank you, Alisa. And while you can email several points of entry, just put in questions via email to [enoperations@ssa.gov](mailto:enoperations@ssa.gov). The team will route that to the appropriate Social Security colleagues. And with that, let's go over to Ana. Ana, we continue to have questions and comments in chat. Can you select one for our presenters, please?

**Ana:** Thank you, Derek. I think, as a clarification, there are some individuals saying that they have not received the newsletter. They may not be part of a distribution list, so the distribution list that we have is for all the main points of contact at ENs and VRs, but you can also sign up to be added to that distribution list if you want to receive GovDelivery messages. So you can always email [enservice@ssa.gov](mailto:enservice@ssa.gov), and you will be added. In the meantime, if you would like to check the newsletter, we also post the newsletter right at the same time that GovDelivery is going out to all of you. So you can check the website, [yourtickettowork.ssa.gov](http://yourtickettowork.ssa.gov) website, and we always post the Ticket Connection there. Thank you.

**Derek Shields:** Thank you, Ana. Yeah, currently your [tickettowork.ssa.gov](http://tickettowork.ssa.gov) the carousel, the very first image that's in the carousel and link is focused on the Ticket to Connection newsletter. That was the last one, and the other one will be coming out in early October. Krista, looks like we have a hand raise.



**Krista:** All right. Just one moment here while I get them promoted. All right, Lori, your mike is enabled. Go ahead, unmute yourself and ask a question.

**Lori:** Hi, thank you for taking my call. I just want to be reminded, I guess, that if, in the event, ugliness occurs tomorrow at midnight, and the government does shut down... As I remember, because I've been through two or three of these now, we can still use the portal. It's going to be the payments that are going to not be processed, correct? But we'll still have access to the Ticket Manager, but we may not receive messages back from Social Security. Is that correct? I'm sorry to bring this up. I just don't remember how it was handled before.

**Derek Shields:** Lori, thanks for your question, and no need to be sorry about that. Mel, go ahead, please.

**Melanie:** I was just going to mention, so any policies that we may have had in the past, whether those will remain the same as TBD. So in the event there is a shutdown, we will be sure to send out information just so that everyone is aware of what you may or may not have access to during that period.

**Lori:** Okay. And I just — well, thank you, and I just wish all of you the best of luck. I'm sorry that all of this has happened.

**Melanie:** Yeah, we appreciate that. Thank you.

**Derek Shields:** Thank you, Lori. And back to Krista for another raised hand.

**Krista:** Michelle, your mike is enabled. Go ahead and ask your question.

**Derek Shields:** Michelle, go ahead and try to — well, we have you back on mute. Try again, Michelle. Unfortunately, you're unmuted, but we're unable to hear you. You could try another time.

**Michelle:** Can you hear me now?

**Derek Shields:** We can hear you. Go ahead, Michelle. Thank you.

**Michelle:** Okay, so sorry about that. I was hoping I could have someone repeat the updates that came about the EN services, or the EN services update?

**Derek Shields:** In regard to the Services and Supports or from Program Integrity?

**Michelle:** It was the updates about like what needs to be provided for like suitability, and if someone — I just missed some of that.

**Derek Shields:** Sure thing. That's from Erinn Weidman. It was her second bullet on the bottom of her slide. Erinn, would you kindly go through those reminders and updates that you provided?



**Erinn Weidman:** Thank you. So, I had a reminder when submitting suitability documents to CC EN Service on all correspondence. I also mentioned that when you submit a suitability application, you need to send a separate email to EN Service with the SSA-222 and TPA change form to add the employee. And then the same if you're removing an employee, you need to submit a TPA change form. And then my last two reminders were just to ensure you have the correct email address for EN Service and for the Suitability Office. The Suitability Office address recently changed. We sent out a GovDelivery message on July 30 titled "New Email Address for SSA Suitability Office." And that has that email address in it. And then to ensure that you include your PID and the EN name in the subject line of all emails. If you have any other questions about those reminders, feel free to also just reach out to EN Service, and we'd be happy to send a breakdown of all of those reminders.

**Michelle:** Great. Thank you so much.

**Derek Shields:** Thanks for the question, Michelle. And we had a follow-up question from Amanda. "What is the new email address?" And maybe we could get that back into chat to help answer that question. So our team will be working on that. Go ahead, Erinn, I see you put your camera back on.

Thank you. And Ana has put in — one of the questions in chat was, "Where can we get the new 821 file?" And Ana has put the URL to [ssa.gov/forms/ssa-821.pdf](https://ssa.gov/forms/ssa-821.pdf). The new form is dated 09/2025. So if you're wondering about the date, look for September 2025. That will ensure you're using the updated form. Ana, let's go back over to you. There continues to be some questions and comments in chat. Can you pull one out for the presenters, please?

**Ana:** Yeah, so there has been several questions about timely progress reviews, some a little bit more specific than others. Some have been asking when it's going to start and asking about the school requirement or educational requirements, and things like that. So, Mel or Natalie, I don't know if you can address them or if we want to collect the questions, and then follow up on them specifically?

**Melanie:** Yeah, this is Melanie. I'll just say we don't have any information about the future of TPR, so it won't be anything that we wouldn't give you plenty of guidance or notice about. What Katie was mentioning earlier was just a result of the previous TPRs and something that we found in a recent analysis. So that was specifically for the reinstatement of protection for CDRs, but there's no information to share at this time about TPR.

**Derek Shields:** Thank you, Melanie. So, again, there will— when that — if and when that happens, guidance will be provided, and it will be provided with plenty of notice, but there is no update at this point. I'll read out the post that Erinn just dropped in chat with the new email address in there. As of July 29, the SSA Suitability Office has their new email address. It is [SecRes.PerSec.Contract.Vetting@ssa.gov](mailto:SecRes.PerSec.Contract.Vetting@ssa.gov). This is why we have placed it in chat, so you can



copy and paste that for your record-keeping. Thank you, Erinn. And, Ana, back to you for another question or comment from chat.

**Ana:** So there is another question that it was responded in chat, but I believe it's worth repeating. So the question was that VR agencies operating as ENs, who also participate in cost reimbursement and whose portal users are verified through that program require to have employees also verified for EN services. So this is referring specifically to the October employment verification, and it was clarified in chat that, no, for VR agencies, we don't follow that process; it is specifically for ENs only.

**Derek Shields:** Thank you, Ana. I see Linda has a question inside the chat. "Off topic. IWPs are allowed electronic signatures. Will the SSA-3288 be allowed electronic signatures?" Does a colleague from Social Security have a response?

Linda, thanks for submitting the question. We'll capture that one and circle back to you with information from a Social Security colleague who could best answer that. Ana, going through chat, any other questions that you could identify or comments that you'd like to call out?

**Ana:** I think they are all related to, like I said, TPR. There is also one about PIE that I want to acknowledge that we received, but we will share with Social Security and follow up on that one specifically.

**Derek Shields:** Yeah, thanks. With the Payroll Information Exchange information, as Jayme noted, we do encourage you to attend the October WISE that she provided the reminder about when Social Security will have a representative join the WISE and present on the Payroll Information Exchange, perhaps addressing the very question that you have, but definitely going through some updates that would be important for everyone as we encourage ENs to support beneficiaries' utilization of PIE moving forward. As a reminder, you can continue to ask questions in chat or to use the "Raise Your Hand" feature. We do have plenty of time for more questions. So go ahead and use "Raise Your Hand" or chat for any questions.

**Melanie:** Derek, this is Mel. I just wanted to clarify in case I misspoke my previous comment about TPR. It was not stating that that is definitely coming back, and we would send notice. I should have said if or when there is ever any information regarding TPR, we would be sure to send out plenty of notice. Thanks.

**Derek Shields:** Thank you very much, Mel. So if or when, meaning there is no timeline, no known identification of when that could happen. But if it did, you'll have plenty of notice. Krista, it appears we have a raised hand.

**Krista:** Yes, I have Sandra. Your mic is enabled. Go ahead and unmute yourself and ask your question.



**Sandra:** Yes, thank you. My question is for those beneficiaries who are actually going into the EPE phase, and they know that their gross earnings are going to be over the SGA, and they want to suspend their benefits check. Is there a form that can be used to stop payment?

**Derek Shields:** Sandra, thanks for the question.

**Sandra:** Thank you.

**Natalie:** Hi, Derek. This is Natalie from Social Security. Go ahead, Mel. Sorry.

**Melanie:** No, no, no, Nat. I was just going to say, I think Rachel did mention that earlier, and I think she left the call. But go ahead, Nat, if you were going to share. I know she referenced it, and I didn't get the name of the form.

**Natalie:** Yes, she did reference it, and I was going to look through my emails, and as soon as I find it, I was going to put it in the chat. I apologize for that.

**Sandra:** Okay, thank you.

**Derek Shields:** Thank you for the question, Sandra. And Rachel had to drop at the hour, so that's why she's not able to answer. But if Natalie finds it, we'll have it in chat before we wrap up this call. Krista, we have another raised hand, please.

**Krista:** Yes, next we have Nicole. Your mike is enabled. Go ahead and unmute yourself and ask your question.

**Derek Shields:** We see that you unmuted yourself, so go ahead and try, Nicole, to ask your question.

Unfortunately, we're unable to hear you. Go ahead and try to unmute again and see if that allows you to talk.

As an alternative — we see that you unmuted. Try talking now, Nicole.

I'm sorry for the technical challenge. We're unable to hear you. If you have the ability to type your question or comment in chat, we'd certainly appreciate that. While you work on that, Katherine is suggesting, please increase the audio volume. Perhaps we can't hear you because of that, or type your question in chat. In the meantime, let's circle back with Ana. A few more comments or questions in chat. Can you select one for our panelists, please?

**Ana:** We don't have any new ones. The latest one that came was related to TPR, who will be receiving the emails. But I clarified that we don't have details right now. So like Mel said, if/when — when there is more information about it, we will share with all the ENs. Nothing new at this point.



**Derek Shields:** Okay. Thank you. And we'll circle back to Nicole. We still see your hand raised, but we're unable to hear you. And Nicole has now posted in chat. "I would like to ask how it is best to identify LTD or STD that are being shown as work wages?" These are for overpayments related, is Nicole's question. While normally that's held for the payments topics of the All EN Payments calls, would somebody on the Social Security team like to address that at this time?

So we don't necessarily —

**Natalie:** Hi, Derek, this is Natalie. Can you please repeat that? I was responding in chat to the form, the form SSA-795.

**Derek Shields:** So, let's respond to that first, and then we'll get back to Nicole's question. So, Natalie has posted the form SSA-795 is the form to use. Sandra had asked the question. The Ticketholder can fill the form out and request to have the benefits suspended. Nicole asked the question, "I would like to ask how it is best to identify long-term disability and short-term disability that are being shown as work wages?" This is in relationship for overpayments.

**Alexis:** Hi, is this in relationship to overpayments for social security or overpayments for Ticket to Work, like EN payments?

**Derek Shields:** Nicole, if you could respond to that in chat, since we can't hear you, that would be helpful. Social Security is the response. Alexis.

**Alexis:** Unfortunately, I do not have that answer. As far as overpayments towards an EN for a payment they received for this program, I could have answered. I do not know in terms of for disability payment overpayments. I do apologize.

**Derek Shields:** Not at all, Alexis. Thanks for chiming in. We'll capture the question and be able to try to research and circle back for Nicole. Thank you for the question, Nicole, and sorry about the technical challenges.

**Alexis:** Hi, this is Alexis again. I do know that some ENs will use that SSA-821 form. So that might be something to look into. And maybe we can bring that question back to Rachel Vincent to find out officially.

**Derek Shields:** Thank you, Alexis. So, Form 821, just to repeat what was said. We appreciate that, and we'll capture, Nicole, your question and name and be back to you. And to Natalie, Sandra says, "Thank you for getting that information into chat. Appreciate that." A couple of other questions and comments. Ana, anything in particular stand out, or are they mostly just comments that we've heard already?

**Ana:** It's related to the comments. Somebody made a comment about 795 results and the benefits being suspended as not due to work or earnings. That puts the Ticketholder at a



disadvantage as well as EN. It's a comment about it. But, yeah, nothing new, just related to that form.

**Derek Shields:** Thank you. I see Amanda just posted earlier. It was mentioned that to reactivate medical CDR protection, a beneficiary should call TPM. What is the process? Do they just say they're actively participating now? Do they need to submit proof to TPM?

**Alexis:** That's related to TPR that Katie had mentioned, and she did say that there will be more information going out at some point — like soon. I know she had to drop from the call.

**Derek Shields:** Thank you. So, GovDelivery, Katie mentioned, will be prepared and provided in order to have the details for that process. So, it is forthcoming. There's not a specific date. But Katie is no longer with us, so we'll have to await the guidance to come out in that GovDelivery email. And Amanda responds, "Great, thanks." At this time, we'll take a final call for any questions for our panelists. We have a few minutes left. If there was any question, you can raise your hand and Krista will call on you, or you can put it in chat. And Paula has reinforced it'd be very helpful to know. So again, that guidance will be forthcoming. Katie just wanted to provide the update that it will be coming soon.

All right. Without any new raised hands, questions, or comments in chat, if we could go forward, Rose, to the next slide, please.

Thank you. Before we wrap up, we wanted to provide a few more reminders about upcoming events. As Jayme mentioned, on October 22, our next WISE webinar will be "Ticket to Work: Support on Your Employment Journey." This will feature a presentation from a Social Security representative on the Payroll Information Exchange. As always, we encourage your participation but also appreciate your support in sharing these announcements with Ticketholders.

Next, on November 4, we appreciate the opportunity for payments discussions on the All EN Payments Call. And then November 12, we are preparing for our next EN Essentials. This session will be announced and will feature some specialized content that is designed based on EN feedback and requests for content. And we are finalizing those details right now. So more on that for the November 12 WISE — or excuse me, EN Essentials coming soon.

Also on November 19, we'll focus on Ticket to Work for America's Veterans, and our guest presenter will be Deborah Wagner. If you've heard her before about dual beneficiaries and supporting veterans through Ticket to Work, you know she's fabulous. We encourage you to mark that down for the WISE webinar on November 19. For all these, you can check out your Ticket to Work online at [yourtickettowork.ssa.gov](https://yourtickettowork.ssa.gov). Go to the calendar of events under "Training Events" and you'll see the remainder of the calendar for the 2025 year. Of course, if you have any suggestions or recommendations for us, we do appreciate those, too.



Let's go forward to the next slide. Our next quarterly All EN Call will be on December 9 at 1 p.m. Eastern time. It will be scheduled for 90 minutes to wrap up the year with that All EN call. If you have suggestions for topics for the All EN Call, we certainly appreciate those, and you can email us at [enoperations@ssa.gov](mailto:enoperations@ssa.gov). You can also provide feedback on today's call by sending an email to us at [enoperations@ssa.gov](mailto:enoperations@ssa.gov). On behalf of our colleagues at Social Security and everyone on the team at Ticket Program Manager, we thank you for participating today. This ends today's Quarterly All EN Call. Thank you.