



QUARTERLY ALL EN CALL TRANSCRIPT

March 18, 2025

Derek Shields: Welcome to today's Quarterly All Employment Network call. My name is Derek Shields. I'm with the Ticket Program Manager, and I'll be serving as today's moderator. Before we begin with today's presentations, I will cover some housekeeping logistics and our agenda. Let's move forward two slides please.

Here are some key points and reminders of how to get the most out of today's All EN call. First, please remember that per the Ticket Program agreement section, excuse me, part three, section 11, subsection I, EN staff are not permitted to record this meeting nor capture the transcript. TPM is capturing a transcript and recording and will produce an all EN recap and transcript after the call. This will be posted to the Your Ticket to Work website.

Next, for questions, please feel free to ask a question in the MS Teams chat. That's available through the chat menu option at the top of the window. If joining via telephone and you wish to ask a question, it is a two-step process. First, raise your hand using star five and you'll be unmuted. Then we need you to press star six to speak. If joining via MS Teams and you wish to ask a question out loud, you're able to do that using the raise hand option. That's the hand symbol at the top of the menu area of the browser. Please limit your questions to one per participant so we can hear from everybody. Additional questions or comments can also be sent to ENOperations@yourtickettowork.ssa.gov. We have somebody staffing that email box, especially if you're calling by phone and you prefer to send it in through email, you can do that. We will note effective April 1, that email will change to ENOperations@ssa.gov. Again, today use that ENOperations@yourtickettowork.ssa.gov or those questions that are not answered during the live event, we will forward them to the appropriate presenters and get responses out to you.

Next, closed captioning is available for participants who join using the MS Teams application or through a separate closed caption link provided in the GovDelivery and also posted in the chat by Brittney. To turn on closed captions in MS Teams, please go to the more menu option. That's the three ellipses in the MS Teams menu at the top of the window, click on More and then go down to language and speech and select Turn on live captions. When using the link option that was posted in the chat, you can paste that link directly into the browser of your choice and it will open a separate window to view those closed captions.

All right, those are our logistics for today. Now I'd like to review our agenda topics and speakers. Let's go to that. Thank you. All right. After I review the agenda here, we will move to hear welcoming remarks from Patrice McLean of Social Security. Afterwards Mariely Lopez will



provide a presentation on the new subsidy form. Then I'll be back to provide an update on the program email address changes that are forthcoming, as I alluded to on April 1 for that one. Next, Jayme Pendergraft will join us again to provide an update from the communications and outreach work being done. And our last presenter will be Ana Morales, who's going to provide us an update on the EN service provider foundation's training modules that will provide an update on the transition to the new modules. After that, all presenters will be available for a group Q&A with a total of 90 minutes scheduled. We have plenty of time for our presentations and for your questions. So we encourage you to participate.

Next slide, please. Before I introduce our first speaker, I'd like to take a moment to welcome the new Employment Networks that are with us today. We have a list on the screen. I'll read them now. From Illinois, we have Lisa Gagliano. From California we have Oticon U.S. In Nevada, Inspire Career Services. In North Carolina, Chatham Trades Inc., in South Carolina, SOS Care. And in Florida we have two new ENs, JustRight Consulting Inc. and Best Buddies International Inc. In Arizona, we have Riseability LLC and in Maryland we have RiseHands, LLC. So we appreciate having these new Employment Networks with us and welcome them to the greater Ticket Program community and look forward to the work you'll do in supporting ticketholders on their employment journey.

Next slide, please. Okay, it's now time to introduce our first speaker, Patrice McLean. Patrice is the acting Director in the Office of Employment Support for the Social Security Administration. Patrice, over to you please.

Patrice McLean: Thank you so much, Derek. Good day everyone. My name is Patrice Mclean and I'm the acting Director of the Office of Employment Support. As many of you know, our previous director, Rob Pfaff, who would otherwise have been doing this welcome, retired after many years of public service to include his most recent years at SSA. I've worked in the Office of Employment Support for just over six years, and I'm happy to continue leading OES in his absence. With that said, I'd like to extend a very special welcome to each of you to today's All EN call. As Derek mentioned, we prepared a number of presentations for you guys and information that we believe is going to be helpful, and we look forward to sharing them with all of you. At this time, I'll hand back over to Derek who will introduce our next presenter. Thank you.

Derek Shields: Thank you, Patrice, for your welcoming remarks and for your leadership of the Ticket Program. Now we'll move forward to our first presentation today. For that, we will welcome Mariely Lopez with the Office of Employment Support Policy team. Mariely will present on the new subsidy form. Mariely, over to you please.

Mariely Lopez: Thank you, Derek. Good afternoon, everyone. Again, my name is Mariely Lopez. Today I will cover some basic subsidy policy as it relates to work CDRs and walk you through the updated work activity questionnaire SSA-3033.



Next slide please. Thank you. What is a subsidy? A subsidy is a Work Incentive, a support provided by an employer in receiving more pay than the actual value of services performed. A special condition is a support and on-the-job assistance provided by an employer or someone other than the employer. For example, a VR agency provides a job coach. Because of the support, they may receive more pay than the actual value of services performed. Special conditions are subsidies generally provided by someone other than the employer. We consider the existence of subsidies and/or special conditions when we make a Substantial Gainful Activity decision. We only use earnings that represent the real value of work to decide if the work is SGA.

Next slide please. Technicians develop subsidies when there are strong indicators that subsidy exists. Examples of those include: if there appears to be a marked discrepancy between the amount of pay and the value of services or the nature and severity of the impairment indicates that the employee receives unusual help from others in doing the work; or the employee is involved in a government sponsor job training and employment program; or the person is in the military service and is being treated for severe impairment; or subsidy is not currently alleged but has been verified for the same employer and applied in a previous position.

Next slide, please. Technicians develop a subsidy by contacting the employer or other knowledgeable source listed in form SSA-821 by phone and they collect the data on the SSA-3033 or a reported contact. If they cannot reach them by phone, they would mail the form to the employer. For work CDR specifically, the decision is documented in the CDR processing system, and they use the exact percentage as indicated on the form.

Next slide please. The reason we made changes to the form was that an audit found that Social Security technicians were applying incorrect subsidy amounts. They were not documenting presence of verification or the amount of the subsidy, and lastly, applying subsidy without clarifying inconsistent information with employers, because the form and policies were unclear. Per OIGs recommendation, we took the lead on forming a work group of various stakeholders who had firsthand knowledge in processing work CDRs. The group consisted of AWICs regional coordinators, operations payment centers, and included valuable feedback from WIPAs. The form went through the IRD process and recently published. With years in the making, the form now incorporates clear instructions on developing and documenting a subsidy with exact subsidy amounts and includes the vast majority of pain points. With that said, let me introduce to you the new form.

Next slide please. I'm going to outline the relevant changes in the form starting with page one, paragraph one. In that section, we revise and soften the language since the feedback received included that some of our employers were reluctant on completing and returning the form, because they fear they were negatively impacting their employee. Additionally, some employers were not completing the form if the employee was not currently employed. We changed it to say, please assist us even if the worker is no longer employed. Under information



about subsidies, we added the statement how a subsidy reduces countable income since there were misunderstandings on how we would use the information. It used to say a subsidy exists when an employer willingly pays more in wages than the value of the actual services performed. Now it says, when an employee's work is subsidized, we do not consider any earnings above the reasonable value of work or services performed. Right underneath that, we added more examples of subsidies. We've also removed the information about unsuccessful work attempts based on the final rule published in 2016 that removed the verification requirements.

Next slide please. On page two, we added examples on the sources who might have direct knowledge of the employee's work activity such as a job coach, job developer, or other knowledgeable source. We did not want to limit the request to a supervisor and to be consistent with updated language on an upcoming release of the SSA-821. As some may know, at times it can be very difficult to obtain such information directly from the employer or supervisor, or they may not be familiar with all the aspects or duties or services being performed. Therefore, we've opened the request to include VR counselors, Community Work Incentives Coordinators, or ENs as a knowledgeable source. We've also changed the return time on the form from seven to 10 days to be consistent with other work CDR forms such as the 821 and added "as soon as possible" to encourage the form is returned.

Next slide please. On page four, underneath the work activity questionnaire, we added the employee's name and SSN. This was because at times we received the questionnaire but there was no information on it, and it was hard to associate. We've also added employer name after business, we changed date stop to date work ended, and if applicable, again, to encourage return of the form even though they might have stopped working. We've also added salary after hourly wage. In section one, questions one through five, we revise the questions as a pathway to help guide a possible subsidy and listed examples. If you take a look at question one, it asks, "does the employer require additional assistance or employer accommodations to the job duties?" Examples: job coach, extra help. You would then select yes or no. If yes, explain in section two. Then you will move on to the next question and so forth.

After question five, we then say, if the answer is no to all the above, please proceed to section three. That was changed because oftentimes technicians would receive inconsistent information on the form. If you simply answer no to the questions, there is no need to develop any further. However, if you answer yes to any, you would proceed to question six. On question six, we added examples on how to determine a subsidy amount and revise the scope of the percentages. The values range from 10 to 100 and included in the other option should the employer calculate a subsidy other than those listed. We understand the scope of the percentages might not apply in every case, but this was incorporated due to feedback received within the regions with the overall goal to make it easier for the user and to provide more consistent information without having a need to recontact.



Next slide, please. On the last page, we removed the unsuccessful work attempt information. We added a remarks section for any of the questions in the prior pages, and lastly, we added contact information for the person completing the form. All right, those were the significant changes to the form. Back to you, Derek.

Derek Shields: Mariely, thank you so much for going through the subsidy form with the updates to the different parts of the form itself, providing the definitions, refreshing the changes to the letter, describing it, and then the work study questionnaire too. We do have a question in the chat. We're going to welcome Mariely back for the Q&A and we'll bring that question up at that time. If you have other questions, feel free to put them in there. Our team will have them prepared for our panelists.

Our next agenda item, as I mentioned earlier, is to provide some program email address changes updates. And for that it's important for us to start out by describing the purpose of the change. And so, we are bringing all of the Ticket to Work email addresses that are under Social Security's domain to meet the Office of Management and Budget mandate that all federal agencies prioritize the use of .gov domains and the networks that they sit on for official communications to ensure both public trust and discoverability. So with that in mind, let's go to the next slide, please.

The new email addresses that I'll review now will become effective on April 1. This is going to impact many Ticket Program email addresses that will be changing. We ask that you update your records accordingly. Please know that we'll also be sharing this through a GovDelivery update, so you will receive this in another email. But we wanted you to become aware through this All EN call too. Specifically, the new email addresses and their purposes are listed on this slide and the following slide. On the left side, we have the current email address, and then in the middle, the new email address, and on the right side, the purpose. So for the EN operations email box that we use for training, partnership plus, and other points of entry around development, that's moving from the yourtickettowork.ssa.gov domain to ENOperations@ssa.gov. EN recruitment looking for service providers as potential ENs to join the program will transition to ENRecruitment@ssa.gov. For payment inquiries, the new address will be ENPaymentshelpdesk@ssa.gov. For ticket assignments and service provider website and ticket portal services that systems help, EN systems help will change to that ssa.gov address. And the fifth change on this slide is the program integrity email. The purpose there being services and supports reviews, those GSO inquiries and other PII reports. That new email address will be ttwprogramintegrity@ssa.gov.

Let's go to the next slide, please. On here we have the continued email address changes. The second group of five. APOR inquiries will change to ENAPOR@ssa.gov. TPR inquiries will change to tprhelpdesk@ssa.gov. Success stories will be ttwstories@ssa.gov. For the webinars, inquiries for our Work Incentive webinars, the whys, those will go to ttwwebinars@ssa.gov. And the last update, transitioning from the choosework.ssa.gov over to ttwsocialmedia@ssa.gov. That will



be for all blog posts and social media suggestions. Again, 10 email updates that are effective on April 1, before April 1, meaning for the balance of March, please continue using the addresses that you may currently have. Using yourtickettowork or choosework in the domain name. This becomes effective April 1 and there will be a GovDelivery coming out that lists all 10 of these changes for you to be able to update and notate appropriately. So we encourage you to follow through on that GovDelivery when it arrives. That ends the new email address update. We appreciate your assistance in that transition to ensure that we comply with that OMB mandate.

And with that, let's now transition to the next slide please. As we mentioned in our agenda, we'll shift now to focus on communications and outreach. And to provide those updates, we welcome back Jayme Pendergraft, the Director of Communications and outreach for the Ticket Program Manager to the All EN call to provide the updates. Jayme, over to you please.

Jayme Pendergraft: Thank you so much, Derek, and good afternoon, everyone, or good morning depending on where you are.

Next slide, please. So I've talked about these for a while and I'm now happy to share that our new videos are available on the Choose Work website. You received a sneak peek of a couple of them if you attended NENA or were on a prior All EN call, but we recently published a series of short videos promoting the Ticket Program and other Work Incentives along with the services you provide. They're available online and they can be used to market the Ticket Program. They're located on the Choose Work website under the video tab, and I'm sure that link is getting sent out to you as well. We encourage you to share them on social, play them in your office, and use them in other creative ways to help increase awareness about the program. And we also hope you enjoy them.

Next slide, please. Our next WISE or Work Incentive Seminar Event webinar is next week on March 26 from 3 to 4:30. We'll talk about the Plan to Achieve Self-Support. This webinar will be an overview of what PASS is, and then in April we'll discuss how ticketholders can use their PASS. We hope you'll join us for this series and also invite interested ticketholders and other stakeholders to attend. You receive sample social media posts via GovDelivery, but if you do need them, feel free to reach out to that social media email address that I'll share again in a second. Don't forget to tag us when you share.

Next slide, please. And speaking of sharing, here's how. We're on Facebook at Choose Work and on X at Choose Work SSA. Our WISE posts are pinned, and we encourage you to use our content to help fill in your social media calendars. We're also always looking for success stories. Starting April 1, send story leads to ttwstories@ssa.gov. Until then, you can keep using stories@choosework.ssa.gov. Remember, don't include any PII in your email. Our Success Story Coordinator, Kimberly Childs, will reach out to you for more information. You can also send blog posts or other content ideas to ttwsocialmedia@ssa.gov after April 1. Before then it's socialmedia@choosework.ssa.gov. And with that, I believe I will hand it back over to Derek.



Derek Shields: Thank you, Jayme, for providing the communications and outreach updates. We had a share in the chat from Brittney about how to access the social media content, of course, that many of you are familiar with, and also to provide leads. Remember, those email addresses become effective April 1. Use the old ones prior to then and we'll be adding a link to the videos in the chat to that video landing page shortly.

Thanks a lot. Let's move forward to our final presenter. Today we welcome Ana Morales, our ENDT Training Manager, to join us to provide a great update about the EN Service Provider Foundation's training. Ana, over to you please.

Ana Morales: Thank you, Derek. And good morning and good afternoon, everybody. Thank you for joining the call today. If we move to the next slide, I'm going to provide a brief, important update about our EN Foundation's Modernization.

As you know, we have been talking in previous calls as well as during NENA if you attended, about what's coming, what we have been working on for the last year or so. And we are very excited and happy to get to this moment. So the EN Foundation Modernization Project we have been doing is working with the modules. We have incorporated e-learning best practices. We updated content, gained operational efficiencies via rebuilding the Bridge learning management system, which is what we currently have and what we will continue using. And also the modernization of the modules will help us maintain the content through our responsive authoring tool that we have already tested. And it's pretty efficient because we can make changes to the modules and maintain them regularly. So I feel like we need some drum rolls or some fireworks because we are getting to our launch date, which is going to be April 1. Within a week and a half we are going to start, we're going to launch these modules. We're going to put them on the Bridge Learning Management System as well as our website. All the information will be shared with you with the details, where to go, and how to access it via GovDelivery. And we are also going to start enrolling our new learners into the new modules on April 1. Currently, we have close to 70 plus learners in Bridge right now, and they are going through different learner pathways. So we are going to also share specific information with them. But as a preview, we're going to maintain the current LMS or the current way of doing the modules until May 30. After that, we are going to ask the learners to hopefully graduate by then, but if not, they will have to move into the new modules, the new way of doing the learning. And that's going to be the specific instruction that we are going to work with them. But we are going to be operating on the dual way of current modules versus new modules. We are, like I said, excited to do this. We want to thank Social Security, all our internal different departments at TPM, our technical assistance of course, and all the IT support that we have received. We gave you a preview of what the modules are going to look like in the last All EN call, and we are looking forward to welcoming our new learners. And of course, any feedback we are also welcoming that. You are going to be able to share that with us through EN operations -- I think that's my last slide, so I'm going to send it back to Derek.



Derek Shields: Thank you so much Ana, for providing the update on the transition to the new EN foundation's modules for both the public-facing Your Ticket to Work website and for the required training that is through the learning management system. Also effective April 1. A lot of transitioning on April 1, including the email addresses and training modules. Those end the presentations that were prepared for today. We have seen some activity in the chat, and I know we have a raised hand, and we have plenty of time to make sure that all these questions are both read and responded to by the team that's with us today. First though, let me remind you how you can participate in the Q&A session.

So let's go forward to the next slide please. If you want to ask a question over the telephone, please raise your hand using the Star Five option, and then you'll be unmuted by our facilitator, and we'll call upon you. Then you would need to take the second step and press star six to unmute yourself. If you're with us through MS Teams as many people have been doing, you can enter a question or a comment in chat or you can choose to raise your hand, and your mic will be unmuted as we call upon you. Just try to remember to state your first name, the name of your EN, and then go ahead and ask your question. And we could do one per person in order to cover everyone. So we have had a couple questions in the chat that are going back a ways. Let me go to Brittney first. Brittney, can you come in and bring forward some of the chats from the chat history to share with our presenters, please?

Brittney: Sure. Our first questions are for Angelina. Have AWICs and WILL at SSA been informed of the new 3033? Can we share SSA POMS updates stating that those other than the employer can complete the form?

Derek Shields: Thanks, Angelina, for the question.

Mariely Lopez: Thank you. That is a very good question. We did have a presentation last week with some of the AWICs and we do have instructions coming up for technicians within the next few weeks that advise specific instructions on documenting subsidies including the new form. So that should be coming out shortly.

Derek Shields: Thank you, Mariely. So there is an education campaign to ensure their awareness of that and a follow up can occur. Thank you, Mariely. Brittney let's go back to you for another question from the chat, please.

Brittney: All right. The next question says for number six on the 3033, if the employer selects 20% as an example, then SSA would count 80% of the earnings. Is that correct?

Mariely Lopez: That is correct.

Brittney: Thank you. The next question was, does the employer have to sign the subsidy?

Mariely Lopez: The employer or other knowledgeable sources can sign the form. It's not limited to the employer. It is -- we've opened that up to include the job coach, job developer, or that



other knowledgeable source. If they have any questions on possibly any of the questions in the form, they could include any information in the remarks section, any additional information.

Brittney: Thank you. Want me to keep going Derek?

Derek Shields: Yeah, let's do one more with you, Brittney, and then we'll go over to raised hands.

Brittney: All right. Next question. Can ENs print off the 3033, have the employer sign it and mail it to SSA, or do we have to wait until SSA sends the 3033 to the employer?

Mariely Lopez: The form can be printed; however, it's best practice and better suited for them to wait for the actual SSA-821 to be sent so they can assist on getting that SSA-3033.

Derek Shields: Thank you, Mariely. Thank you, Brittney. Let's switch over now. Krista, we have a couple raised hands. Can you call on our first question, please?

Krista: All right, thank you Derek. Dan, your mic is active. Go ahead and unmute yourself to ask your question.

Derek Shields: Dan, we're trying to get you unmuted. If you're having trouble with that, we, as an alternative, could take your question in the chat, but we prefer to have you be able to ask that out loud if you like. If you're having a challenge and have access to the chat, it says you can't speak. We will troubleshoot that with you. And in the meantime, let's move to our next raised hand just to see if we could get Kevin unmuted. Krista.

Krista: All right. Kevin, your mic should be active. Go ahead and unmute yourself to ask your question.

Derek Shields: So both of you are experiencing the same issue and unable to activate your microphone. And although the instructions have been provided to select the mic at the top of the window, it seems like neither is able to at this point. Kevin just dropped his hand and indicates "correct," that the platform is not allowing that.

Katherine: Hi, Derek --

Derek Shields: Go ahead.

Katherine: Sorry Derek. Kevin, if you'll go ahead and just click your microphone up top, you should have access.

Kevin Nickerson: Oh, I sure do now. Thank you very much.

Katherine: You're welcome.



Kevin Nickerson: This is Kevin Nickerson with American Dream Employment Network. And this is, you know, in line with the other questions around the new 3033, which I think is great. I think the updates are really good, and it was needed for a long time. I always had to explain things to an employer about the intent of the form, and that's been laid out nicely. My biggest concern, and it's a big change, is what others have alluded to that maybe somebody close to the person, a job coach or an employment service provider can now complete this because they know their work very well. Related to this, I was given advice recently by Social Security, let's say when somebody should be in a suspended status, but they haven't maybe completed the work activity report that we can send in a statement of claimant or other person a form SSA 795 because we know of that information. So we'll send that. But then we were advised that SSA really needs the beneficiary to sign that even though it's a statement of claimant or other. So my biggest concern with this new change to the 3033 is that they won't, they being Social Security representatives, won't take seriously the information if completed and signed off by that employment service representative. So what can we do if they do not take that information as they would an employer's information? What can we do?

Mariely Lopez: Normally a report of contact is either taken by phone or on the actual form. So we encourage the individual to reach out to the local office and work with them. If there's any questions in regards to the SSA 3033, I always recommend that you document any other details that you would add on the remarks section. That way we should be able to reach out and vice versa.

Kevin Nickerson: Okay. I will -- we will try that. Oftentimes we do get stuck at the local field office with these kinds of things. I hope your education campaign really brings that level of knowledge forward so that they will understand various people might be completing this. Thank you so much.

Mariely Lopez: Thank you.

Derek Shields: Thank you, Kevin, for the question and bringing that up and Mariely for the response. So I know we have another raised hand. I'm looking at the chat and I'm trying to figure out if we can -- Dan has a raised hand, but I'm not sure Dan wants to speak because of his comment, "speech impediment, can't speak." But let's take your question in the chat or try one more time. If we can get Krista or Katherine to present the -- Dan as a presenter to unmute.

Katherine: Hi Dan, you have access to your mic if you do want to ask a question.

Derek Shields: This is Derek. If you prefer to put it in the chat, we will take your question for sure and elevate that by reading it for everyone. And --

Ana Morales: Derek?

Derek Shields: Yes.



Ana Morales: This is Ana. I believe the question that Dan asked earlier is using the CDR, will this increase the SGA so receiving payments is that much higher, right? I believe that's a comment that he typed in the chat earlier and he said, "please read."

Derek Shields: Thank you, Ana. So Brittney had that in our lineup to get to, and Dan was making sure that we were taking notice of that to have it read out loud. We've done that. Would somebody from Social Security like to respond to Dan's chat post?

Mariely Lopez: I'm not exactly sure if I understand the question, but the reason that a subsidy exists is because we're not going to look at -- we're looking at the overall countable earnings to make a Substantial Gainful Activity determination. If that's not exactly the question that was raised, I can take that back and get an answer for him.

Derek Shields: Thanks, Dan. If you want to post a follow-up comment or question in the chat, we'll be sure to read that again. Just it seems to be what's the correlation beside -- between the subsidy form and any potential impact on SGA. So just please put that in and we'll be watching that. In the meantime, Brittney, let's come back to you. The chat continues to be active. Bring us up to speed with the next comment or question, please.

Brittney: Sure. Another question is, what is the difference between this review versus a medical review and when is this work review conducted?

Mariely Lopez: This review -- this subsidy is to make a determination in regard to work. A medical review looks at the medical aspects to see if the individual is still disabled. And I'm sorry, what was the next part of the question?

Brittney: When will it be conducted?

Mariely Lopez: We do have instructions coming out for technicians that will advise them because we made some changes. So we do have some instructions coming out shortly that will be released that provide a little bit more detail.

Brittney: Thank you.

Derek Shields: Thank you, Mariely. Please continue, Brittney.

Brittney: So is there a tax break for employers who complete the subsidy?

Mariely Lopez: That may not be a question for Social Security to answer. It sounds more like an IRS question, so unfortunately, I'm not comfortable answering that.

Brittney: Thank you. Next question. Are there concerns that limiting the phone services will impact people negatively; the elderly, those with disabilities?

Derek Shields: Thanks, Brittney, for bringing that up. Go ahead, Kristine. Thank you.



Kristine Erwin-Tribbitt: Yeah, this is Kristine. I think this is referencing some of the information that's come out from our commissioner about the new procedures of identifying yourself when you make changes to direct deposit. If that's the case, I know we are working very hard to try to find alternatives and exceptions to the new policy to handle any issues where someone maybe not be able to travel to a field office or needs to do the information over the phone. I believe we are working -- well, I don't believe we are working on things, and those procedures should come out, I think they said within the next 90 days.

Derek Shields: Thank you very much, Kristine. I appreciate that. And while we have a break between questions there's always the most popular question, will the presentation be posted? And the response was placed in the chat, but I'll just read it out for accessibility. Yes, all calls presentations, meaning the All EN Call and other all calls, those presentations, the recording, and the transcripts are posted in the Your Ticket to Work website under the Event Archives. So we do put that recap out and we'll have that available for you to reference the slides, but also a recap of these discussions too. It looks like we have another raised hand. Krista?

Krista: Hi. Looks like Paula. Go ahead and unmute your mic and ask your question.

Paula: I'm also excited about this 3033. I wanted to know about the client's -- the worker's signature and do they sign it physically or is it electronically and where does it go? Where do we send the form?

Derek Shields: Thank you, Paula. Mariely?

Mariely Lopez: Yes. So on Section 3 of the form, we ask for printed name and title and the organization or the employer's name. So that's where you would put the information. But the information we ask for is for the printed name, title, and organization. And on the actual form in the cover pages, Page 2 or 5, we advise the individual to return the form as soon as possible. But the forms go to the local office. So they would try to return those there or fax it.

Paula: Wow. Oh, that'll be -- so we don't have any idea when -- does Social Security pay the difference or I'm just trying to understand how it works. So the worker, how do they get paid? Just the amount minus the subsidy and then Social Security pays the subsidy?

Mariely Lopez: No, we -- for the subsidy, we take a look at the overall picture. We're trying to develop to see if the individual's work is being subsidized, to see if the individual is making over Substantial Gainful Activity. Substantial Gainful Activity is a certain dollar amount that would count over the limit that an individual is allowed to make.

Paula: Okay. So they would get paid from the employer normally and on the form, what -- does the employer get money back? Just trying to figure out where the money is.

Mariely Lopez: No, the purpose of this form is so that Social Security can develop to see if there's a subsidy alleged in the person's work activity. So this specifically does not affect what



they would get paid from the job. We are only taking a look at how it's going to work with us to see if the person is making over Substantial Gainful Activity.

Paula: So the employer just pays less?

Mariely Lopez: The employer might.

Kristine Erwin-Tribbitt: Yeah, let me jump in. Maybe if I try to explain it in a different way. Okay. Anybody making over \$1,620 in salary a month loses their disability check.

Paula: Right.

Kristine Erwin-Tribbitt: What we're trying to do here and have been -- subsidies have been around for many years -- is we're trying to determine if someone is making more than \$1,620, but yet they're only producing maybe 50% of their work, we will do a deduction and say that the person's working below SGA and therefore can keep their check. So there's no money being exchanged. It's just us trying to determine if the person can work Substantial Gainful Activity. And if somebody's not fully earning what they're being paid, we want to make those adjustments and then make our decision to say they're not working over SGA even though they have more than \$1,620 coming into the household.

Paula: So is there a certain percentage that is the most that they can earn? I mean, is it 20% or 30%? When do they decide that? Is it automatic?

Kristine Erwin-Tribbitt: So the current SGA threshold amount is \$1,620 for someone that is non-blind. So any earnings over that technically counts as SGA but if an employer is subsidizing their earnings, i.e., I like to use the example of a mechanic. Every mechanic in that shop has to fix six cars a day, but our beneficiary is getting paid the same rate as the other folks fixing six cars, but he can only fix three cars. So that 50% subsidy is what we would look at. He's only able to do -- so he might be bringing in \$2,000 a month just like his fellow coworkers, but we're going to say that only \$1,000 counts towards his Substantial Gainful Activity. So we would allow him to continue making the \$2,000 a month, but he would not be considered over SGA.

Paula: Oh, well, that's just wonderful. Thank you so much.

Kristine Erwin-Tribbitt: Sure.

Derek Shields: Thank you, Paula, for the questions and Mariely and Kristine for those responses and examples. And I think Dan posted in the chat, "Got it. Thank you." And your description helped answer his earlier question as well. I'd encourage you to look at Form SSA-3033. It's dated February 2025. We'll, of course, provide the link in the follow-up materials, but it's also online readily available. And the specific question about a signature, the information's on this form, but there doesn't appear to be a signature required itself, to answer another question



from Paula. And the examples under question -- Section 1, Question 6 -- those examples are really helpful too. Krista let's go back. There's another hand raised, please.

Krista: Yes. Kevin, your mic is active. Go ahead and unmute yourself to ask your question.

Kevin Nickerson: All right, thanks a lot. Our conversation today, Derek, makes a case to become a certified Work Incentive practitioner, does it not? Very complicated things but useful. I have a very different question that I've just -- I'm just curious about as I've looked at ENs on the directory and so forth it seems like there has been a bit of a drop in the overall numbers of tickets assigned, and I wondered if there was a correlation between the new two-way communication requirements that were imposed last year and the total numbers of tickets assigned now in the Ticket Program.

Derek Shields: Thanks, Kevin, for your question. I think I'll ask someone from our Social Security colleague group to respond to that. If there's not anyone there, I will tell you in the past that -- go ahead. Sorry.

Erin: Hi Derek, this is Erin. I think we'll need to take that question back. Oh, it looks like Mel actually might be able to answer.

Derek Shields: We have a hand raised, Krista. We believe that's Mel.

Melanie: Can you guys hear? Sorry, I was talking on mute. Can you hear me now, Derek?

Derek Shields: We sure can. Go ahead, Mel. Thank you.

Melanie: Okay, sure. This is SSA. And Kevin, was your question correct? I just want to make sure.

Kevin Nickerson: Yes, that was my question.

Melanie: Okay. And as a reference, were you talking about the number of Employment Networks that has gone down from the Find Help tool on the Choose Work website?

Kevin Nickerson: No, I was referring to actual assignments of tickets.

Melanie: Okay. So the number of ticket assignments that have gone down is for different reasons. Whether it was a result of different projects that we've been doing, if it was for purposes of ENs unassigning them for different reasons, beneficiaries unassigning it. To your specific question, if there were any correlations in the two-way communication requirement, we don't have any data readily available to say that, because of this new -- well, it's not new anymore. But because of the two-way communication requirement that has resulted in those tickets being directly unassigned, there are different reasons that come out for whether it's during services and supports reviews or things that have come up where there's questions,



there's training. But directly going down as a result of that, that is not something that we are available to share.

Kevin Nickerson: Thank you.

Melanie: Sure.

Derek Shields: Thank you, Kevin. And thank you, Mel, for coming on to assist with that response. At this time, it doesn't look like we have any other raised hands. Let's go back to Brittney to check to see if we have another question coming out of the chat. Brittney?

Brittney: Yes, we have a training question. "I was told that the only staff that needed to go through the EN foundations training were the main points of contact. Other staff do not need to go through this and can be trained internally. Will this be the same with the new training system?"

Derek Shields: Thank you, Brittney. Let's bring on Ana to describe the required training versus the optional training. Ana?

Ana Morales: Thank you, Derek. So you are correct. The training -- well, the training is offered to everybody, but we do it a little bit differently. The training through Bridge, which is the learning management system is targeted to main point of contacts at each EN as well as Ticket Portal users. So they will go by themselves, do the modules, but they will also have one-on-one interaction with the analysts that we have as part of the EN development and training team. So they will have supporting sessions, they will have learning assessments, and we will guide them from the beginning all the way through the end. But we are also going to post the modules on the public website, which is the Your Ticket to Work website. And you are not going to have the same one-on-one support that we are providing for the main points of contact. However, we're always available for clarification or questions that your team may have, but the modules are going to be posted out there. Anybody can take those modules. And if again, like I said, if you have any questions, you do have an assigned trainer or EN development and trainer and activation analyst, or you can email EN Operations, and we will be happy to provide any clarification that is needed.

Derek Shields: Thank you so much, Ana. Reinforcing that the way things have been operating, they'll continue to operate. The content that's available will be different, but the required versus optional training will remain as it was. We do forecast that there'll be slightly fewer modules, and we anticipate maybe having less time required for those required training segments. Thanks for that question. Brittney, back to you for another question from the chat, please.

Brittney: Yes, I have another one that just came in. "If the subsidies put the ticketholder under SGA, will the EN still be eligible or get paid for their outcome in Phase 2?"



Derek Shields: Can you repeat the question one more time?

Brittney: If the subsidy puts the ticketholder under SGA, will the EN still get paid for the outcome in Phase 2?

Derek Shields: Thanks. This is Derek. I was trying to catch up to this. And while this has been asked, we tend to focus the All EN Calls on non-payments-related topics, and we save those to go to the provider help desk or to our All Payments Calls. Since we have asked it and we're focused on it, is there somebody from Social Security that would like to respond to it? If not, we just encourage you to -- from the subsidy perspective we have that training, but it gets into a payments question. So I don't know if Mariely or Kristine is interested in speaking to that from the subsidies perspective.

Patrice McLean: Hey, Derek, this is Patrice. Yeah, sorry, Kristine.

Kristine Erwin-Tribbitt: Yeah, this really is more of a -- it is specifically a payments question, and I think we should hold off. I do believe if the subsidy form is used and subsidies applied to the point where it brings the person's earnings below SGA and they're still in phase -- then outcome payments would not be available. But I do think we're going to take that back to a payments team member specifically, and then we can provide more detailed guidance.

Derek Shields: This is Derek. Thank you very much, Patrice and Kristine. So we've captured your question and we'll take that one for a follow-up through the payments experts on the team. If you have a question you'd like to read, speak it out loud, please use the raise hand feature or the two-step process if you're via telephone. We do have time remaining. Brittney, back to you. Do we have any other new questions or comments in the chat?

Brittney: There is a question. I'm sorry, I'm trying to put it together. It says, "The changes look good on the form except for the examples that might still be a little hard for the employers to determine the percentage when they're paid normal rate working normal rate but have other accommodations."

Derek Shields: Thanks, Brittney. So Mariely or Kristine kind of a reaction to the examples and in this case saying an employer might have a hard time doing that, but one of the things I also heard is that this change allows employers or others who might understand the impact of reasonable accommodation in the model. Any reaction to the comment?

Mariely Lopez: We've also left -- go --

Kristine Erwin-Tribbitt: You want me to go ahead, Mariely?

Mariely Lopez: Yes.

Kristine Erwin-Tribbitt: Yeah, I mean, utilize the remark section. If the employer is having any trouble, they can always put the information in the remark section and we can reach -- there is



going to be enough guidance in our instructions that the technician will know if there's any issues or remarks or has questions. That's why we ask them to put that information about who to contact and what number to reach at and those kinds of things because we may need to reach out and get more information. So if they're having trouble answering Number 6, they can put in the remark section, "I'm having trouble, this is what's going on. Please contact me," and we'll get back with you.

Derek Shields: Thank you very much. Appreciate that. Brittney, back to you. Any other questions or comments for the presenters?

Brittney: There are no other questions at this time.

Derek Shields: Thank you, Brittney. Appreciate that. If you have a question, we do have remaining time available for your questions. Feel free to use the raise hand feature or to drop it in the chat. I see a chat post from Sandra here. "Will there be guidance or notifications regarding impacts on the Ticket to Work Program due to changes to the Social Security Administration?" Would one of our colleagues at Social Security like to comment on this question from Sandra? I think at this point we'll take Sandra's question back to the team and provide any follow-up. I think as is usual, if a policy or program change comes forward and it does impact the program, the agency provides that guidance. So I think that would be the customary next phase. But at this time, we'll take that one back to have a follow-up to your question, Sandra. It's like Kim has posted two future topics. Could SSA do one on explaining the various letters beneficiaries receive while in the Ticket Program and for the Ticket participants who turn 65 while in the program, can you at a future training explain the process and the written correspondence the beneficiary receives? So two suggestions there with a lot of reactions, five thumbs up to that. Brittney, let's circle back to you. Any additional questions or comments that you've been able to see in the chat?

Brittney: None that has not been answered yet.

Derek Shields: Thank you. I do see a chat from Pashina. "Where can I obtain information on the two-way communications?" I just want to make sure that -- if that was responded to earlier, I missed it. And I --

Ana Morales: Hey Derek, this is Ana. We haven't responded, but most likely we are going to follow up with Pashina on that specific topic.

Derek Shields: Great. And there is some supporting information and resources that we can get on the description of the two-way communications and how that could be followed for compliance. Lakesha here has posted the two-way communication requirements are listed in the RFA under Section 4 Individual Work Plans, and we can follow that up. And Erin has shared that as well. And we'll provide that in the recap too. It's about six minutes after the hour. And we have a balance of time available. The questions are slowing down. We'll give another 30



seconds if you'd like, raise your hand or feel free to drop your question into the chat. If we don't have any other questions, then we'll proceed to wrap up this session. Okay. We haven't had any --

Melanie: Derek, sorry, this is Mel. I stepped away for a second, but I just saw the question about whether or not there would be changes or how we would communicate updates. Could you repeat the question that somebody asked earlier, specifically about Ticket? I believe it was some sort of notification --

Derek Shields: Will there be guidance or -- yeah, Sandra, "Will there be guidance or notifications regarding impacts on the Ticket to Work Program due to changes to the Social Security Administration?"

Melanie: Okay, so the answer to that is yes. If there is anything that directly impacts any of our program stakeholders for Ticket or anything else that we think will be helpful for you, we will definitely share that through the same GovDelivery communication or other calls that we have questions that come in. I know that we have received some questions from you when we were first hearing about some of the policies that had come out. We did not send anything out at that time. Things quickly went in another direction. And so the responses that we provided at that time were business as usual for now until you hear otherwise and we'll be sure to communicate that. So the short answer is yes, we will be sure to let you know if and when anything changes in terms of the way that we need to do our day-to-day business.

Derek Shields: Thank you very much, Melanie. Appreciate that response to Sandra. And I think other people were interested in that too. While Mel was providing that response, it appears that we have a couple of other questions or comments in chat. Let me circle back to Brittney.

Brittney: Yes, we had a few other ones come in. This one says, "So for an employee who has a severe disability, the employer would likely pay the worker minimum wage. Example: in shelter workshops for a mechanic who is paid full-time and only does part-time work, wouldn't they just pay them as a part-time employee?"

Derek Shields: Thanks, Brittney, for that question from Paula. Mariely or Kristine with this example, I think that it's referring to the subsidy approach. Any reaction to Paula's example?

Kristine Erwin-Tribbitt: It doesn't matter whether the person is part-time or full-time, we still just look at the gross earnings per month. And then if there are any indicators that the employer is subsidizing or they have a job coach or have a severe disability, then we will develop for subsidy if their earnings are over SGA. If they're below SGA, there's no need to develop a subsidy because they're below SGA.



Derek Shields: This is Derek. Thank you for that, Kristine. I think the key there is about the amount of money, not whether it's a part-time or full-time status. So that would be up to the employer whether it was a part-time or full-time status. I have another question from Kevin. "Do you recommend using Form SSA-795 to report to SSA that EN has knowledge that a beneficiary is working over SGA and should be in suspended status?" I always advised this was a good approach, but SSA doesn't seem to accept or signing off on it, only beneficiary, meaning I believe only the beneficiary signing off on that form. And Kristine, please.

Kristine Erwin-Tribbitt: Yeah, technically the 795 needs to be signed by the beneficiary because it is a statement from the beneficiary. If you believe they're working over SGA and you know they've completed the Trial Work Period, I think it would be the best approach to instruct the beneficiary to contact us and say that they want their benefits put into suspense to avoid an overpayment. We do accept that approach and we can take action to stop the benefits if they think they're going to be overpaid. And then we will then go ahead and make the official decision so that they'll have a formal notice. But we can put folks in suspense while we make that final decision.

Derek Shields: Thank you very much, Kristine. Krista, it appears we have a raised hand.

Krista: Sorry. Go ahead, Kristen. Unmute yourself and ask your question.

Kristen: Hi, thank you. Just going off of the last comment, in reference to being put in suspense mode, I've had difficulty at our -- I'm assuming we would contact the field office for that. Is that correct?

Kristine Erwin-Tribbitt: That is correct.

Kristen: Is there certain terminology or something in a letter that the beneficiary should write to request that? As folks that I've worked with it's resulted in some overpayments and so forth where it took six months for somebody to get their benefits turned off. So I was just wondering is the wording "can you cut my benefits in suspense mode," the specific terminology or is there something else?

Kristine Erwin-Tribbitt: You know what we could do is get you to cite the POMS reference to draw attention to the technician to go there and know that they can do this. So let's get that to you after the fact. We'll put something together and then share it with you.

Kristen: Okay, thank you. I appreciate that.

Derek Shields: Thanks for the question, Kristen. And we can ensure that that POMS reference is included in the follow-up recap, if that would be helpful. Brittney, it appears that there's a couple of other comments or messages being posted in the chat. Circle over to you.



Brittney: Yes. Kevin posted a follow-up to his question about the 795. "Who was considered 'other' on that form?"

Kristine Erwin-Tribbitt: It's generally a representative payee or someone acting on behalf of the beneficiary.

Derek Shields: Thank you, Kristine. Krista, we have another raised hand.

Krista: Hi. Amber, go ahead. Unmute yourself and ask your question.

Amber: Let me -- oh, there it goes. It was on mute. Good afternoon, everyone. So this is my first All EN Call. I am very honored to be a part of the Ticket to Work coordination team here at Voc Rehab. I'm also the senior lead benefit specialist here. And one of the things we do is, of course we do assist individuals in reporting their wages to Social Security. We also assist with a work review. Is there a way that -- kind of piggybacking off of this question with the, 'hey, I know I've used my trial work months, I know I'm over SGA, is there anything else that the CWICs or benefit specialists can do in regards to initiating an additional that work review if we know that the individual's getting to the end of their trial work period months?'

Kristine Erwin-Tribbitt: You know, the best way to do that is just keep reporting the work. Just keep going in on a monthly basis and reporting the wages. Our computer systems keep tally of all the reports of work. And then once we know they're almost at the end of the Trial Work Period, then we do send alerts to the technicians for them to go in and initiate a work review.

Amber: Would reporting on their SSA account also help with that? Because if we do know that once a work review has been completed, then that's where they can go in on their own SSA account and report those wages monthly themselves as well. So would that also help the 'hey, you've used your trial work months, you're over SGA, we're going to go ahead and suspend these benefits?'

Kristine Erwin-Tribbitt: Yes, absolutely. Our computer systems here right within WR do check the mySSA account wage reports and we alert based on those wage reports. So yes, absolutely.

Amber: Awesome. Thank you.

Derek Shields: Thank you for joining this All EN Call and for bringing up that question, Amber. Appreciate that. And thanks for your response, Kristine. There's a comment in here. "I appreciate the information and taking time to answer our questions." We have a little bit more time remaining to make sure we answer all your questions today. Circle back to Brittney to find out if there's another question or comment in the chat for our panelists.

Brittney: Yes, we have a question from Tina. "In regard to the subsidy if the beneficiary works for an employer that primarily trains and hires disabled employees, would the beneficiary be



able to use then a subsidy form, or are they already receiving a subsidy form due to the specific job and training?"

Kristine Erwin-Tribbitt: So in those kinds of situations, I would say use the subsidy form because we just don't know -- we need to understand what the environment is and comparing it to someone that was not disabled in those kinds of things. So it really depends on what duties they're performing, if they're doing the set amount of duties. Then they could be considered not being subsidized even though they may be just picking up sticks as I used to say. It doesn't -- if they can do that job, then they're fully earning their salary.

Derek Shields: Thank you, Kristine. I think that's a good statement there. No matter -- what we're looking at here is if they're doing all of the job functions that they're asked to do, then a subsidy might not apply. If they're not doing that, then what percent and tell the story. It's like Savannah has posted. "What can we do when ticketholders have repeatedly notified SSA?" Brittney, have we asked that question yet?

Brittney: We have not.

Derek Shields: Okay, I'll continue then. "And notified SSA that they're being overpaid, and their benefits continue regardless. I have multiple people on my caseload who continue to receive overpayments." Well, this does get into the payments category that I think we -- I advise them to set the money aside and they can pay it back. But since that is a payments-related topic, we're not going to go into that today. We do encourage you to bring that up during the All Payments Call that we have and ensure that you can also reach out to the payments team service provider help desk in order to address those items too. For non-payments-related topics and questions we have a few more minutes of time. Brittney, do we have any other questions or comments that we should call out?

Brittney: We have a question from Anne. "If you place a person in suspense, does that also suspend their medical benefits?"

Kristine Erwin-Tribbitt: No. The one unfortunate thing about putting somebody in suspense is then we're not deducting the Medicare premium. So instead Medicare will be -- you'll be billed for the Medicare premiums, and I believe they do it on a quarterly basis. Mariely, help me out here. Is it still quarterly?

Mariely Lopez: Yes.

Kristine Erwin-Tribbitt: Okay.

Mariely Lopez: It should still be quarterly.



Kristine Erwin-Tribbitt: Okay. So and the same would apply for SSI if they're in suspense. We have 1619(b) policies that allow the payments to continue even if the earnings are above SGA, their Medicaid can continue. So hope that answers it.

Derek Shields: Thank you, Kristine. Krista, it looks like Amber has another question.

Krista: Yes. Amber, your mic is available. Go ahead and unmute yourself and ask your question.

Amber: All right, so it's really kind of to piggyback off the Medicare thing. Again, I'm not sure of everybody's role on the call as a benefit specialist or the CWIC what we do also is we check to see about the Medicaid buy-in. So if the individual has their benefits suspended due to work and not because of medical improvement, check with your state to see if they might qualify for the Medicaid buy-in to still have that Medicare Part B premium covered. And what I also have discovered in doing this Medicare, yes, it's quarterly initially until you actually contact them and then they can go ahead and withdraw from the bank monthly. But that's after calling Medicare -- whatever your plan is through, you can also call Medicare yourself and see if they can take out the deduction monthly instead of quarterly.

Derek Shields: Thank you, Amber. Appreciate that and appreciate all the participation today. Sometimes during the All EN Call, the presentations take up a lot of time and we don't have the opportunity to hear as many questions and respond to them. Obviously, today it was our intention to afford more time for questions. Speaking of that, just check in one more time with Brittney before we go to wrap up. Brittney, a final question or comment from the chat?

Brittney: Final question is from Liz. "Did I hear that having job coach support is considered a subsidy?" She wanted to confirm.

Kristine Erwin-Tribbitt: So typically, yes, it's a strong indicator of their subsidy. But it depends on how much the job coach is assisting. Like are they actually doing some of the duties that the beneficiary is responsible for? So but it is a good strong indicator. There's likely subsidy involved in the performance but it may not be if the job coach is just standing and observing and the person's doing all the work they're supposed to be doing, then I would say no subsidy applies at that point. So you can go either way.

Derek Shields: Thank you very much, Kristine. Helpful answer. Each case needs to be evaluated based on its own merits and who is actually performing the job functions. And with that, we'll take that as our final question. If we can move forward to our final slide and we will wrap up today's session.

Looking ahead, our next quarterly All EN Call will be on Tuesday, June 17 from 1:00 PM Eastern Time, scheduled for 90 minutes. We do encourage you to send your topic suggestions. We've had a couple in the chat today. For these All EN Calls to our EN Operations mailbox currently through the end of March that's enoperations@yourtickettowork.ssa.gov. However, as we



notified that will be changing in the future, it'll be enoperations@ssa.gov. We have a few ideas again captured from today.

We also would like to make you aware of our upcoming events. March 26 next Wednesday will be our next WISE webinar as Jayme reported in her outreach update. This will be "Ticket to Work and the Plan to Achieve Self-Support." There's a lot of interest in the PASS plan. This will be a good one to ensure that we're sharing with interested participants. April 9 will be our next EN Essentials. We had one in January; we'll do one in April. This one is being set now. It's going to be a great one, "Building Successful Employer Partnerships." We're bringing some great stories together about the key elements that make a successful employer partnership for ENs. And then all of your All EN Payments Calls questions can be brought on May 6, the payments experts from TPM and SSA will be together for that call. In the meantime, you can bring those questions that you have to the service provider help desk as well. All of this information on the events and the rest of the 2025 calendar is available on the Your Ticket to Work website under the Training and Events section, you'll find that link. We encourage you to notate these activities on your calendar to block them off. Again, if you have any recommendations or feedback on today's All EN Call, we encourage you to submit that through our enoperations@yourtickettowork.ssa.gov website or sorry, email or on or after April 1 to enoperations@ssa.gov. Thank you all for joining and your participation. And a special thanks to our panelists as they provided updates and answers to questions today. This ends today's call.