



QUARTERLY ALL EN CALL RECAP JUNE 16, 2026

Welcome

Derek Shields, Ticket Program Manager

Derek welcomed everyone to the call, reviewed the logistics and discussed the agenda topics. He then announced the new Employment Networks (EN) who recently joined the Ticket to Work Program:

- Chippens Hill Group LLC, DBA Clearweave Careers – CT
- Expert Vocational Insights LLC – CO
- Donakeh LLC – WV
- Workforce Career Center – GA
- Reinvented Destiny LLC – MD

Payroll Information Exchange (PIE)

Laura York, Employment Support, SSA

Laura explained that PIE is a partnership between SSA and Equifax, allowing beneficiaries whose employers participate in Equifax's payroll system to have their earnings automatically reported to SSA, provided they have a signed SSA-8240 authorization form. This process eliminates the need for manual earnings reporting for those beneficiaries.

SSA advised ENs to encourage beneficiaries to use PIE for easier wage reporting, noting that for SSI, PIE updates records directly, and for SSDI, it triggers work investigations. PIE is recommended even though not all employers participate.



Benefits Planning Query (BPQY)

Renee Moore, Employment Support, SSA

Renee delivered a comprehensive presentation on BPQY, covering its purpose, data accuracy, request procedures, verification requirements, and handling discrepancies.

BPQY Function and Data Accuracy: Renee explained that BPQY is a summary report of beneficiary information from SSA systems, reflecting current data at the time of generation. The accuracy of BPQY depends on the underlying SSA records, and discrepancies should be reported for correction.

Field Descriptions and Common Confusions: Renee addressed common questions about BPQY fields, such as differences between total family cash, full, and net amounts, and clarified that these fields represent different calculations. She also explained Trial Work Period dates and verification statuses for SSI and SSDI earnings.

Request Procedures and Consent Forms: Renee outlined best practices for requesting BPQY, including sending requests to the correct office, completing the SSA-3288 consent form accurately, and using the current version to avoid delays. She emphasized that requests for BPQY for return to work planning are not subject to fees.

Digital Signatures and Secure Communication: Renee stated that BPQY requests require wet signatures and SSA cannot accept digital signatures. A BPQY can be returned via fax if authorized, and via email only to recipients on SSA's secured partners list, which requires a business domain and technical contact.

Follow-Up Questions and Policy Development: Renee noted that follow-up questions after BPQY fulfillment may require additional consent and are subject to privacy and disclosure policies. SSA is developing a formal BPQY policy to ensure consistent handling of such requests.

Questions & Answers 1

A question-and-answer period followed, which is part of the call recording and transcript.



Ticket to Work Survey

Seth Hartig, Employment Support (SSA)

Seth, supported by Holly Matulewicz and Sarah Croake from Mathematica, provided updates on the Ticket to Work survey sent to ENs and beneficiary interviews, including participation incentives, contact information, and fielded questions about survey impact and prior changes.

Survey Distribution and Participation: Seth explained that SSA sent survey invitations to EN contacts via email and mail, with a \$40 gift card incentive for completion. ENs who did not receive the invitation were advised to contact Mathematica at ttwevaluation@mathematica-mpr.com.

Beneficiary Interviews: Mathematica is conducting interviews with beneficiaries to gather feedback on the Ticket to Work Program, also offering \$40 gift cards for participation. ENs were encouraged to support beneficiary participation.

Additionally, Seth provided the following contacts for different type of questions:

- For questions to SSA: Eleanor.Stinnett@ssa.gov and Seth.Hartig@ssa.gov
- For questions to Mathematica about the survey: Holly Matulewicz, 844-576-1306
- For questions to Mathematica about Ticketholder interviews: Sarah Croake, 844-576-1307

Questions & Answers 2

A question-and-answer period followed, which is part of the call recording and transcript.

Question not answered during the call:

1. Has SSA made any changes due to surveys that they have conducted?

SSA response: Yes, SSA has made changes to our programs and policies that are informed by the feedback that we receive from providers and program participants through information collection activities such as surveys. These include, but are not limited to:

- Making the 2008 regulatory changes to the Ticket program;
- Introducing ePay to reduce the burden of payment requests;
- Absorbing the Employer EN model into the Traditional EN model to allow more ENs to employ Ticketholders without additional administrative burden;



- Releasing EN guidance for completing IWPs (with examples) and providing EN Essentials Training on completing IWPs; and
- Expanding the Ticket Marketing program to enable additional ENs to participate.

Some suggestions that ENs have requested require legislative changes, require resources that SSA does not have, or can take considerable time to implement. However, the earlier we are aware of EN needs, the better position we are in to support and request the needed resources for those changes. We encourage all ENs to continue to provide feedback and suggestions about the Ticket to Work program, policies, process, etc. to ENService@ssa.gov and, if you have not already, completing the survey that Mathematica is administering for SSA.

Social Security Updates

Erinn Weidman, Employment Support (SSA)

Erinn provided reminders and updates on employment verification deadlines, the Annual Performance Outcome Report (APOR) data review, Find Help provider information updates, and guidance for EN Service email submissions.

Employment Verification Process

Erinn reminded participants to complete employment verification by the June 18, 2026 deadline to avoid Ticket portal access issues. Only one Survey Monkey link is sent per EN, typically to the Program Contact or Signatory Authority.

Annual Performance Outcome Report (APOR) Data Review and Find Help Updates

TPM and SSA are reviewing APOR data and will contact ENs with questions. Provider information on Find Help will be updated after outreach, and ENs will receive notification via GovDelivery.



EN Service Email Submission Guidance

Erinn explained that SSA is currently receiving a high volume of emails in the ENService mailbox due to the employment verification process and APOR outreach. She advised ENs not to send follow-up messages or contact multiple email boxes or individual TPM staff members to try to obtain a faster response. This slows down SSA's response time. Additionally, ENs will receive an automated acknowledgement that their email has been received and the team is working diligently to reply as quickly as possible.

When contacting ENService, Erinn advised ENs to include their Provider Identification (PID) number and EN name in the subject line and to add a keyword to identify the purpose of their message, such as:

- "Portal" for questions about portal access
- "Approval Request" for items such as work-from-home or cloud-storage requests

Using these keywords helps SSA route and process their requests more efficiently.

When contacting ENService regarding a TPA change, Erinn advised ENs to complete only the required fields in Section 1 of the TPA Change Form, then complete the sections of the form that pertain to the change(s) being reported and sign the document. Filling out the entire TPA Change Form is not necessary and will slow down the processing of requests.

Communications and Outreach Update

Jayme Pendergraft, Ticket Program Manager

Jayme Pendergraft presented updates on Ticket to Work outreach materials, including new posters, flyers, and videos, their availability and usage, and answered questions about customization, accessibility, and field office deployment.

Marketing Materials

Jayme announced the availability of Ticket to Work promotional posters and flyers in multiple sizes, available to download at [Marketing Materials | Ticket to Work](#) for use in outreach. ENs are encouraged to print and display it in offices, community spaces, or partner locations to increase program visibility. A new introductory video, at <https://www.youtube.com/watch?v=oFeMvDUjneA>, about Ticket to Work is also available for use in outreach, presentations, and social media. The video is playing in SSA field offices nationwide, typically without sound for accessibility and minimal disruption.



Work Incentive Seminar Events (WISE) Webinars Attendance and Promotion

Jayne highlighted the monthly WISE webinars, urging ENs to share announcements and participate in the upcoming session, “Presenting Your Best Self to Employers.” Jayne encouraged ENs to continue promoting these monthly events to support beneficiary engagement and program awareness. Webinars occur on the fourth Wednesday of each month, offering insights into the Ticket to Work Program. ENs are encouraged to share announcements and join upcoming sessions.

Timely Progress Review (TPR) Update

Derek Shields, Ticket Program Manager

Derek Shields provided an update on the TPR re-entry process, clarifying that it applies only to Ticketholders who previously failed TPR, and explained communication procedures for questions and PII handling.

Questions & Answers 3

A question-and-answer period followed, which is part of the call recording and transcript.

Questions not answered during the call:

1. Amber Lydford

Thank you so much. So actually, I was the one that asked that question because I've been dealing with that a lot with this verification. And when I'm already on hold with the local office for 20 minutes before I can get somebody on the phone, and then they're like, well, what's their place of birth? I have a 3288 on file. Is this new? Because I've been doing this for 12 years and I've never, until within the last two weeks, have been asked that question to verify the individual when a 3288's on file. So is that new?

Renee Moore

That's a consent question. It's not a BPQY question. So I'll take it down and we'll ask the privacy consent and disclosure office and we'll get that answer back to you.

Amber Lydford

Yeah, I appreciate that because on the 3288, I have a majority of those boxes checked, which, you know, indicates discussion with the SSA rep on, you know, regarding anything on their case, you know, when it comes to eligibility. Well, really, I can't remember exactly what boxes I have checked, but again, and I have further description in the other information. Number 9, I think is what it is. So when I have all those check

boxes boxed, I didn't think it would be an issue. And then having to call the beneficiary back, get those verified information, and then had to wait back on hold with SSA just to get the answer I'm looking for. If I ever get the answer at all.

Answer: Thank you for sharing your recent experience with phone calls to the Field Office, and for your patience as we looked into your question. To clarify, this is not a new requirement. While you may not have been asked for a claimant's place of birth in the past, Field Office employees are required to verify the identity of the authorized requester (you) and to obtain sufficient identifying information about the claimant to ensure they are accessing the correct record. The specific questions asked may vary, and we are not permitted to disclose in advance which questions will be used. SSA employees have the discretion to select from a range of questions until they are able to confirm the beneficiary's identity.

2. Why is the date still on the BPQY if it is not within the 5 year rolling period. Like they used 2 months in 2016 but nothing since then. Then they have the full 9 month's, correct? but the ssa system is showing only 7 available.

Answer: The BPQY does not calculate or adjust information; it simply displays data that is already stored in SSA's systems. For example, if a person used two Trial Work Months (TWMs) in 2016, those months will continue to appear on the record because SSA does not update the record until a new determination is made on the case. Once a new decision is finalized and processed, the BPQY will reflect the updated Trial Work Period (TWP) determination. Additionally, the BPQY does not calculate the rolling 60-month period. This calculation is performed by the SSA technician when processing the decision.

3. Is SSA able to include verified earnings by month for SSDI beneficiaries since the IRS started charging for that report?

Answer: The short answer is, no, SSA cannot display IRS earnings. As noted during the presentation, the IRS owns the IRS data and SSA can only use it in ways that are specifically authorized. At this time, we are not authorized by the IRS to disclose IRS earnings on the BPQY. However, the beneficiary (through their my Social Security account) can request their my Social Security statement which will reflect the IRS earnings. [Get Your Social Security Statement | my Social Security | SSA](#)



4. Why can't we have an electronic signature on the BPQY?

Answer: As discussed in the EN call, signature requirements are made at agency-level under disclosure and consent policies with legal guidance. Although the agency has begun accepting electronic signatures for select forms (and continues to expand the use over time), the BPQY is not included in the current authorization. Therefore, we are only authorized to accept a wet signature for the BPQY at this time.

5. Should ENs collect the information from each Ticketholder we serve in the case we need to verify someone we are serving with a FO? (i.e. additional private details for verification)

Answer: The Field Office must obtain enough identifying information about the claimant to make sure they are accessing the correct record, the specific identity questions may vary from one employee to another. The specific questions asked may vary, and we are not permitted to disclose in advance which questions will be used. SSA employees have the discretion to select from a range of questions until they are able to confirm the beneficiary's identity.

Upcoming Events

Derek announced upcoming events:

- June 17: WISE Webinar: Presenting Your Best Self to Employers

The date for the next All EN Call is to be announced, at 1 p.m. ET. Send topic suggestions for All EN Calls to: ENOperations@ssa.gov.