QUARTERLY ALL EN CALL TRANSCRIPT MARCH 17, 2026

Derek Shields: Welcome to today's Quarterly All Employment Network Call. My name is Derek Shields, and I'm with the Ticket Program Manager, and I will be serving as today's moderator for this first Quarterly All EN Call of 2026. Before we begin with our agenda and presentations, I'd like to review a few logistics and housekeeping items on the slide that's just come up.

First, it's important to know that 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. Please know, though, that the materials from today's event will be provided and posted to the Your Ticket to Work website for your access and use. Closed captioning is available and working for participants who can use the MS Teams application option or by using the separate closed caption link provided in the GovDelivery email announcement for today's call and also posted in chat just recently. To turn on captions in MS Teams, please go to the three ellipses at the top of the Teams window and click on More, and then go down that list until you find Language and Speech. Select Turn on Live Captions to use those automated captions. When using the link option, you can cut and paste or just select and click that link and it will open the browser of your choice. That's a separate window to view those fully closed captions. All right, next slide, please.

We do appreciate you joining us today and look forward to your participation. And we encourage your questions. There will be a live Q&A. In fact, we have two of them today during today's call. And as a reminder, for those of you who are returning to participate, we have a couple different ways. You can always use the chat feature to bring up a question, and our team will help read those for our panelists. If you prefer to join and you're with us via phone, there's a two-step process. Use star 5. We will then unmute you and you need to hit star 6 to speak. We'll remind you of that as we get closer to our Q&A sessions.

If joining via MS Teams and you wish to ask a question aloud, we encourage you to use the raise your hand tool and your mic will be unmuted when called upon by the facilitator. We do ask you to limit your questions to one per participant. Additional questions or comments can be sent to ENOperations@ssa.gov. And as always, questions that we aren't able to answer during the live event will be forwarded for an appropriate panelist to respond and we'll get back to you after the event. We do appreciate your time in joining us today for the Quarterly All EN Call, so thank you in advance for participating in and sharing your questions with us. Next slide, please.

As I mentioned, let's review the agenda. After I finish the agenda, I will welcome our new ENs and then I will introduce our first speaker, Vernon Collins. Vernon will provide suitability updates. And immediately following Vernon's presentation, we will have a Q&A, so you can ask questions directly to Vernon. Following that, we'll introduce Patrice McLean, who has two updates on the Employer EN model and EN site visits. Following that, we'll have a presentation on the Ticket to Work Survey by Ellie Stinnett. Then we'll have Social Security updates from Erinn Weidman. And finally, we'll close with a presentation and a couple of demonstrations from Jayme Pendergraft, the Director of Communications and Outreach. Following Jayme's portion, that's about an hour from now, we'll have our second Q&A, and that will be available for all remaining panelists. So, with our agenda covered, let's now turn to the next slide, please.

I'd like to welcome our new Employment Networks. If you're joining us today for the first time, we have a list on the screen. I'll read their names now. From Nevada, Weave Solutions. From Ohio, Jewish Family Services of Washtenaw County. From Oklahoma, NewView Oklahoma. From Maryland, Eagle Rehabilitation Services. And from Florida, we have two new ENs, Land of Goods and Talento Hispano Solutions. From Wisconsin, Diverse Paths & Solutions. From Idaho, Abundant Life Employment Services. From Tennessee, 2nd Chance at Living. And finally, we welcome Mountain Employment Training LLC, out of Colorado. So, we do look forward to working with all of the new ENs as they join all of us in working to support more Ticketholders in their employment journey to financial independence. Next slide, please.

It's now my pleasure to introduce Vernon Collins. Vernon is a Supervisory Personnel Security Specialist and an important partner for the Ticket to Work Program that's inside the Social Security Administration. He will now provide us suitability update presentation. Vernon, over to you, please.

Vernon Collins: Thank you, Derek. I appreciate it. Good afternoon. Good morning, Employment Network Community. As Derek said, my name is Vernon Collins. I'm one of the supervisors here in the Personnel Security/Suitability Office. I deal particularly, exclusively with the contractors, as many of you probably have reached out and had conversations or questions that I've asked in the past. So, it's my pleasure to join you guys today. I just wanted to update you on some changes to the suitability process. The majority of them are to get your folks through the process faster. We know everybody wants to get their folks through the process as quickly as possible. So that's what we're aiming to do. There's a lot of changes in the background investigation arena, just as far as federally. There are changes and almost monthly, there's something new. So, we're just trying to stay ahead of everything. So, I asked if I could hop on the call today to go over some changes that, hopefully, you guys will see are going to help you, or better the process as it currently stands now.

So, first and foremost, I just wanted to make sure everyone has our correct email address. There have been a lot of changes over the last seven, eight months, and we've had three different email addresses. So, the one that you see on the screen now, the

SecRes.PerSec.Contractor.Vetting@ssa.gov, that is our current e-mail address. That should not change anytime soon. So just wanted to make sure everybody has our current email address.

Now, I want to start with the change. Now this change is a complete 360 from what you're used to, all the veteran ENs, not the 10 new ones here on the call. But we're changing the order of the process. Since we've gone electronic many years ago, we always required fingerprint completion to be done after your applicants had completed eAPP. We're actually changing that. Again, like I said, 360, we're going to require fingerprint completion prior to you even making the submission to us to begin the process. And I'll explain a little later what that change is going to do, not only for us and some timeliness metrics that we have to adhere to, but then also for you guys as well. So, we do have an updated applicant listing, and we'll distribute that prior to — after this call. We'll send you guys out the new applicant listing. It's going to have an additional field for fingerprint completion date. And then there's some other changes to the document as well. So, we'll get that out to you.

I just wanted to say for the ENs that have been around a while, when we originally initiate an applicant, you get an email and that email has two attachments. One is the fingerprint attachment, and then the second one is a job aid that kind of walks the new applicant through what to expect, as far as the email that's going to be coming from the NBIS system and how they set up their password and everything. Those two documents you will now give to the applicant prior to you submitting the forms to us. So that way, they can get the fingerprinting and then they'll have the job aid. So, they'll be ready to go once they get the initiation email directly in their personal email from the NBIS system.

As far as fingerprint completion is concerned, if you know that you have an applicant that may have worked for your EN prior and for whatever reason, maybe they went through the process and left before we finished, or maybe they departed some years ago. Or if you know that they worked for another EN or SSA contract, or were a former SSA employee, we may concede the fingerprinting step in those situations. So, if you have any applicants that fall into that category, if you want to be sure, you can just reach out to your POC or our mailbox and ask ahead of time. We will let you know if fingerprints are required and we will code that case a certain way to let us know that we already have fingerprints for that individual.

Another change that we're making. And again, you'll understand why when I get into our timeliness metrics below. But previously, we had allowed 14 days for completion of the process, which included the application and fingerprinting. And then we took it to 10 days. So now we'll have fingerprints on the front end, right? You want your person cleared as quickly as possible. So, we're going to implement that we want those applicants to submit the eAPP within five days after initiation. Now, typically speaking, and you all should be able to confirm this — if you make a submission on a Monday, you should, or the applicant, I should say, should be getting their eAPP invitation Tuesday, Wednesday at the latest. Only caveat to that is if they have an investigation with another agency on file and we don't need them to complete the eAPP, we won't initiate and we'll reach out, request the fingerprints, which we won't have to do with this new process. But for the most part, you should be getting your folks the day after. We were extremely backed up during the shutdown. Our office was furloughed as well. So those 43+ days we were out of the office, the submissions were coming in the whole time, so we had a backlog. We initiated probably a couple hundred people in a short amount of time, which means they were going to turn around, and we had to clear a hundred, a couple hundred people in a short amount of time. So, we are out of that backlog now. You should be getting your folk's initiations quicker and their letters quicker.

So why are we making these changes? So, we have to improve our timeliness metrics with the Defense Counterintelligence and Security Agency. That's DCSA. That's who when you get that suitability letter from us, we release the investigations to DCSA. And we have timeliness metrics that we have to improve. And the way our process was set up, it was set up to be behind. Because if we were requiring fingerprinting after eAPP completion, if an applicant had completed eAPP, say, today on March 17, but then they didn't make their fingerprint appointment or were not able to get to a fingerprint appointment until next week. Then, I mean, that case is just sitting there waiting for them to get the fingerprint so that we can review. So now with this new process, once the applicant completes eAPP, technically speaking, we can review that case or start to review that case the same day because we already have fingerprints on the front end. So that will also — you'll see a big difference in the process and times from the day you actually submitted to us. So again, our timelines are going to improve. You're going to see faster suitability decisions.

And then we'll also, this is something that we know over the years, it's not necessarily just EN-related, but just our whole contractor and affiliate population. It will minimize the number of applicants who never complete any of the steps in the process. So, you know, we get hundreds of initiations on a weekly basis. But you may have 15 percent of those that they don't complete anything, or they complete one step and not the other. So, we'll eliminate all of that extra work on our behalf. Basically, we feel like if a person has gotten fingerprinted on the front end, they're probably more likely to go through the complete process. So that's our new updates, just as far as submission and timeliness and getting you guys' applicants cleared as quickly as possible. So, you can go to the next slide, Derek. Thank you.

So, my next update, this is a big one, but it really doesn't have any additional requirements from the Employment Networks for the new hires. We are updating the risk level for the ENs. The last time the risk levels were updated, goes back at least until 2009 in the system. But probably before that, when the ENs really started populating and we got involved in the suitability for them. So, this hasn't been changed for at least 17 years, probably a little longer. We knew that it needed to be changed, but it kind of kicked the can down the road for a while. And then all the changes that we had made us pause it as well. But the EN contracts or TPAs are going to be going from low risk to moderate risk. And we're going to start that fairly quickly after this call because we don't want to keep initiating cases at the wrong risk level, only to have to come back here shortly and get them redone.

So again, I just want to reiterate, especially for these new hires, there's no additional requirements for the EN. You're going to submit the same documentation to us. It's just the applicant themselves that will have a form that's a little more thorough. And I wanted to make sure I made it clear to everyone, because you can also use this information to give to your applicants ahead of time just to let them know what type of information the form that they're going to fill out is going to ask for. That way, they can start to get that information together. But I highlighted the sections that are new as far as the moderate risk form versus the low-risk form.

So, the low-risk form did ask for five years for where you lived and employment activities. This moderate risk form is seven years. And there's also additional sections for people who know you well, relatives, use of information, technology systems, marital relationship status, foreign travel, non-criminal court actions, and then investigative interview. So investigative interviews are not across the board. So, you're going to have people who don't get them, but then you're going to have people that get them. So along with that, I know your folks are probably going to get a call and they're going to wonder if the call is legitimate or not. So, we've also added the email box for DCSA in the hotline that you could call to verify your investigators.

So, if somebody reaches out to one of your applicants to set up a phone interview and your applicant is asking you, "Hey, is this legit? This is the person who called me." You'll be able to call that number or reach out to that email box, and they'll verify that investigator for you. And their hotline is open from Monday through Friday, 7 a.m. to 4 p.m., Eastern Time. And again, this is for new applicants. Next slide, please.

So, for the current population. We're unable to upgrade the whole population at the same time. We want to make sure that we have the bandwidth to get you your new applicants as quickly as possible, because all of the current people are already cleared. And even as they go through the upgraded process, none of that will change. So, when I talk about the next year or two, I'm really talking about fiscal year. So probably by the end of next September, we'll have gotten around to everyone. We've tried to make the upgrades as quick and easy as possible. We already have fingerprints. So, we do not require those. And we're not requiring any additional forms other than the upgraded application. We did reach out. I reached out to a couple of ENs. I wanted to get an idea of how quickly this can happen and then also be able to come and show you guys that it's a seamless process.

If we cleared you already at the low risk level, the odds are there's not going to be any issues at the moderate risk level. We did reach out to a couple of ENs, and they were gracious enough to allow us to pilot how we would work this process out and how quickly we could get it done. So, I did just want to get a shout-out to both Full Circle Employment Solutions and Best Buddies.

They both provided me with a list of current folks, and we started to initiate Full Circle in particular. I think all of their folks were able to complete the new form within a day or two. And if I'm not mistaken, they probably all have been completed by now. There may be one or two that's still hanging out there. But they all were done in a matter of a couple of days. Thanks to how quickly they completed everything and how quickly — because we already had it, fingerprints form, we were able to get to them. So that's just an example of what this new process is going to mean as well. Because as soon as your person completes his or her eAPP, we're already right on the case because we have fingerprints. We're not waiting that additional week or two for them to get fingerprints.

So, I will say, if your Employment Network would like to volunteer to go through the upgrade process, you can let us know. We'll get right on it. And we'll probably have you done within a week or so. If not, then we'll be reaching out here and there to the different ENs to upgrade your population. It doesn't matter if you're a small EN, only have a couple of people, or a large EN. If you'd like to volunteer, just let us know as soon as possible. And again, we'll get right with you and start getting that completed.

So, I did have some general reminders — just to save you some time — when you send in the applicant listing to start the process. So, I know that the applicant completes the OF306. But it's usually the EN that's completing the applicant list. And then sometimes, they may — what the applicant puts as a seven — it may look like a two to the POC that's completing that. But we verify all that information beforehand, or at least we try to. Every now and then, we may fat finger an SSN number or date of birth number in the eAPP system. So, to save you some time, you can just jot down a reminder that if that happens, if your applicant goes in, because they're going to see that their Social or date of birth is wrong because they're not going to be able to proceed. You can reach out directly to your Suitability POC or the mailbox and we'll take care of that for you. Do not call the EN Helpdesk because they're not going to be able to correct that for you. We can't correct it. We have to call the Suitability POC order to correct it. So that'll save you guys some time knowing that there's nothing that the EN Helpdesk can do when we're talking about updating a Social or date of birth. So just reach out directly to us and we'll take care of that.

Same thing if your applicant did not get the email to log into the system. It used to be a two-email process. It's now only a one email process, thank goodness. But again, if you didn't get it or the applicant didn't get it, it could be that the email address that we have in the system is incorrect. But if not, we'll send out a new request to you right away. Again, the Helpdesk is not going to be able to send you another initiation email. And also a reminder that the suitability approval letters that we get, are just the beginning of the process. What we do on our end is really just a preliminary check. Again, we forward to the DCSA after we have approved, and they'll finish the process and then send us back the additional findings. And then we do a final adjudication, which is usually done in the background because our preliminary check is thorough enough. And that's such if you pass the preliminary, very high likelihood, there's not going to be any issues on the adjudication. And it doesn't mean that we won't have to reach back out and get some additional information. So a lot of times when we do reach out, applicants will say, "Well I've already been cleared for this." So just a reminder, that's just the start of the process. They haven't actually fully completed everything. And we may have to reach out on the backend, two months, three months later, sometimes longer. It depends on how long they take to close the investigation to ask for some additional information or documentation.

Coming soon. And this is a big one. Like I told you guys earlier, tons of changes. I feel like something changes every month on our end. But the applicants are very soon going to be able to track their process in the eAPP system using that same username and password that they did to complete the application. They'll soon be able to go in. And once they release, they'll be able to see when we have released the investigation to DCSA. They'll be able to see when DCSA has closed their investigation, and they'll be able to see when we have adjudicated their investigation. So that's something new that's coming really soon on the applicant side where they can see everything, start to finish. And that will be a good tool for them to use, too, if they do leave and go to other places. They'll be able to go in and see, oh, I have a T2 investigation from 2024. And the way the government is changing things, they likely won't need new investigations. They're trying to get away from having to do a five-year investigation. We haven't done five-year investigations on the ENs, only maybe if there was a break in service. But even now, with this change, there's not going to be new investigations every five years. It's more of like a continuous vetting type of situation where there'll be information coming in on a flow basis. We'll be responsible maybe every five years for completing the form, it's not necessarily going to be a new investigation.

And then one more hint that I didn't have on this. So now that you're going to have the fingerprints up front, you know the applicant has completed that portion. So now all that's left is the e-application. When applicants certify, they can take a screenshot, or they could print out the certification page or anything. I would just recommend that POCs know when your applicants have actually completed everything, require them to send you the screenshot or the certification page or whatever, just so you can confirm that they have completed. That would give you an idea of not only when they completed, but how long it should take you to hear something from us.

So, with the changes, I'm going to say if you haven't heard anything within a week, like once we get this process fully started, because there's going to be a portion of time where we're still dealing with people who completed the old way versus the new way, as far as fingerprinting. But once everybody is on the submit fingerprints first, it shouldn't take long. So, you'll be able to know, okay, this was completed on March 17, and now it's March 24. Let me see if I can get a status on this. Okay. All right. So that was the last slide that I had. So that ends my presentation, as far as what I plan to talk about and bring you guys updated on. I'll turn it over to Derek. I think we're going to have some interesting questions. I did see some stuff popping up in the chat as I was talking, but I wasn't able to read them.

Derek Shields: Yeah, this is Derek, Vernon. Thank you so much for your presentation and updates on suitability. I certainly appreciate all that you and your team do to keep clearances in place. We have had some comments and questions somewhere around 10 or so in chat. And we also have the ability for you to raise hands. If we could go to the next slide, just a reminder of how you can participate with MS Teams and your question in the chat, as some have done, or raise your hand and we'll unmute you. If you're with the phone, the two-step process, star 5, we'll call upon you and then you need to hit star 6. And of course, if you also prefer, you can send us an email at ENOperations@ssa.gov. So, let's go first to Brittney. Brittney, we've had some comments in the chat. We've had a few questions in the chat. Can you bring up the first question for Vernon, please?

Brittney: Sure. Our first question is from Valkyrie, and she's asking, "For the staff who have already started the suitability process but have not yet completed it, what type of changes should they expect?"

Vernon Collins: So if you want to make it easy so you don't have to do something again down the line — If you have someone who we've already initiated but they haven't completed anything, if you reach out to us, we'll go ahead and we'll cancel out the current investigation and open up the T2 to moderate risk. That way, they'll be fully compliant. If not, if you don't want to go that route, then you can just go ahead and have them complete, as we've started, with the T1. We'll eventually, again, where the ENs are going to fall as we reach out to them, I don't know. So, it could be we wouldn't reach out to them again until sometime next year to do the upgrade. But definitely, if you haven't started and you want to just go ahead and get it out of the way and not have to worry about it again, we can reinitiate those.

Brittney: Thank you. The next question is from Angelina Bush. Will the EN Suitability Point of Contact be given info on the date of initiation of the eAPP for staff in real time?

Vernon Collins: Okay, this is a good question. Now this is a question. And I'm aware of this. Thanks, Angelina. Our system… it's really a system issue on our end. The EN contracts were originally through our Office of Acquisitions and Grants. Their name has changed, but it used to be through Acquisitions and Grants. It's no longer the case. So those older ENs sometimes, those invites get stuck. We try to check on a regular basis so we can send those out. So, we're trying to do everything we can so that you get those invites the same day that the people get their initiation emails to complete the application. So, we're working — we're going to have a new system here as well soon. But we are aware of it. And we're going to try to do our best to make sure you get those the same day that the individuals get their invites. It won't be — those emails won't be as critical as they are now, because that was when you would probably be sending the applicants their fingerprinting and the job aid info, which the job aid wouldn't have done any good if they had already been in the application by time you forwarded that to them. So, it won't be as critical, but it doesn't mean we still don't want to alert you the same day. So, we'll definitely do our best to make sure those go out.

Brittney: Thank you. We have another question from Angelina. "What is the timeline of when to expect the interview post completing eAPP?"

Vernon Collins: That's a good question as well. I don't really have a definite answer because it really depends on DCSA and how their investigators are scheduled. Sometimes it happens fairly quickly. I don't know if any of the Full Circle or Best Buddies folks that we did last week, if any of them have gotten any calls, but it could happen as quickly as a week or two, or it could be as late as a month… a month or so out. And again, not everybody is going to need that. It really depends on what comes up during the course of the investigation. But not everybody will get an interview.

Brittney: Our next question is from Trip Carter. He asks, "Was the five days calendar days or business days?"

Vernon Collins: Right now, they are calendar days. But that could be changed by the time we release the official guidance. It's not going to be — I just want to be as transparent as possible. It's not like anything is going to happen if they haven't completed within five days. We want to get to a point where we send reminders when the folks haven't completed. The five days is just so if you have submitted those folks to us, you submit them to us because you want them to start working for you as quickly as possible. So, the best way for that to happen is for them to complete that application as quickly as possible so that we can clear them.

So, I just want to reiterate. It's not really going to be anything negative. Things happen. It's possible you don't get initiated until Friday. We get it. You come back when they are already two days in. So, I'll clarify how we're going to have that. But again, if they do go past it, it's just going to be more so a reminder that we'll send out. But we're really just trying to get everybody through the process as quickly as possible. And if you use the information from the slides and again, like I said, if you can provide that to the applicants, they can start to get that stuff ready. Because what really stops most people with this particular form is they need addresses and phone numbers and they may not necessarily have those handy. So, if they're aware of what's needed ahead of time, then that should help them complete the form quickly.

Brittney: Thank you. Our next question is from Kathy DiRusso. What is the possibility of staff being kicked out when they fill in the new answers for tier two?

Vernon Collins: Yeah, so it's very small. This isn't the first or 40th contract that we've upgraded here recently. The numbers are very minimal. You know, if anything we…
again, we may reach out and request something. But how many people have been denied due to the upgrade? It's a very small amount.

Derek Shields: Thank you, Brittney. Brittney, I'm going to jump in here and switch over. We have somebody with a raised hand. So, thanks, Brittney. We'll give you a chance to look at other questions or comments. We did see two positive comments from Kathy and Amy. Kathy, we are working our way through it, but they hadn't received any calls yet. And Amy at Full Circle said it was a very smooth transition. Thank you. And also just mentioned the chat had a few reactions to the future portal access saying the time savings that would be. And he got a thumbs up and applause, too, there, Vernon. So, a lot of support for that from the chat. At this time, Katherine, I'm going to switch over to you and ask you to call on the person with the raised hand, please.

Katherine: Hi, Derek. Thank you. Amanda, you have access to audio if you'll unmute.

Amanda: Hi. Can you hear me?

Katherine: Yes, ma'am.

Amanda: Thank you. Hi Vernon. I just wanted to kind of get clarification. Maybe it's early for me in the morning here. So, with current staff personnel who have already been found suitable, you said that you're going to reach out over the course of the next year or two to get them upgraded. And so, I guess I'm curious. Does that mean that all current staff who have already been found suitable will have to go through this eAPP process? Because all of our staff was found suitable. I mean, we went through e-QIP a long, long time ago. So, we're not familiar with that. So, I just wanted to make sure I was understanding that correctly.

Vernon Collins: Yes, yes, thank you, Amanda. That is correct. All your staff that was previously approved, whether it was here recently — or like you said, as long as 10 years ago — they will have to go through the upgrade at some point. I will say one of the negatives for the folks who have been around a long time is the information won't populate into the eAPP system. Whereas some of the folks who just recently completed that, went through the upgrade process. I noticed that the information probably populated. So that helped them complete it even faster. But again, even with the additional fields like they really completed those upgrades quickly. So, it can be done. But, yes, it will come. I'm not sure when exactly for your EN, but it will come.

Amanda: Sure. Perfect. Thank you so much. That gives us time to get everyone to prepare to gather all that information. Thank you.

Vernon Collins: You're welcome.

Derek Shields: Thank you, Vernon. At this time, we're going to have to proceed with our next presenter. If we do receive further questions, Vernon, are you able to join us for the second Q&A or should we forward those to you?

Vernon Collins: I'm going to try. I do have to log off because I have another meeting. But I'll try. But if I'm unable to, definitely forward them. We'll answer right away.

Derek Shields: Absolutely. Thank you so much for your time, Vernon, and all you do to support the clearances for the TPA staff members. At this point, if we can move to the next slide, I would now like to introduce Patrice McLean. She's with the Employment Support of Social Security Administration. Patrice has two updates on the employee EN model, and –

NOTE: Due to technical difficulties, there was an interruption with the audio of this call. Patrice addressed the Employer EN Model and the beginning of EN Site visits. Please refer to the recap and PowerPoint for that information.

Patrice McLean: — Ticketholder, in-person, of course. Next slide, please.

In the past, ENs have asked what to expect at site visits. So, we wanted to share the following information. If you're selected for a site visit, SSA or TPM will reach out to the EN's Signatory Authority and Program Contact to schedule a date and time for the site visit. We will visit the EN, likely at their primary location, and we'll work with the EN to determine which location would be best. And we'll engage in discussion about the EN's business practices, such as your intake process, who from the EN meets with Ticketholders, where you meet with Ticketholders, etcetera. We'll review on-site IWPs and case notes, and we'll provide feedback on the spot. We'll also answer questions from ENs and ask for any recommendations from the EN on how we could perhaps improve or grow the Ticket Program. After we return from the site visit, we'll collaborate to prepare and send a comprehensive report of the site visit to the EN and assign any necessary corrective actions. Next slide, please.

To prepare for a site visit, have IWPs, case notes, and any EN business process documentation available for review. We will ask to review documents in advance of the site visit, and we'll also ask for additional documentation once we're on location at the EN. Please ensure that EN staff that work with Ticketholders and understand the EN's Ticket operations are available to attend the site visit. Typically, that's the Program Contact and the Ticketholder contact, sometimes the Signatory Authority as well. We will include additional details on what and how to prepare in the site visit invitation, which will arrive via email to the Signatory Authority and the Program Contact. It's also important to note that due to resource limitations, all ENs will not receive a site visit, but we hope to continue conducting site visits each year as long as we have the resources to do so and ultimately visit as many ENs as we can. We'll take questions about the EN business model changes and EN site visits after a few more presentations. So at this time, Derek, I'll turn back over to you. Thank you.

Derek Shields: Thank you, Patrice, for those important updates. We have had some comments and questions, and we'll get back to you in the Q&A when it comes up. If we can go forward to the next slide, please. I'm now pleased to introduce Ellie Stinnett. Ellie is in Employment

Support with the Social Security Administration. Ellie has some remarks about the Ticket to Work Survey. Ellie?

Ellie Stinnett: Thank you, Derek. Can you go to the next slide, please? So SSA is conducting an evaluation of the Ticket to Work Program, and this is to help us understand best practices and identify potential improvements. So, we are going to be sending out a survey later this spring to each EN organization. The person who will receive the survey is the person who is listed as the Program Contact in our SSA data. So, the Program Contact will receive an invitation to the survey by mail and email. The email will come from our contractor, Mathematica. And if you complete the survey, our contractor will send you a check for $40. But you can decline the check if your organization rules prohibit it. We're also conducting interviews with beneficiaries to ask them about their experiences. So, if one of your clients reports to you that they have been invited to an interview, please encourage them to participate and let them know about the legitimacy of this study. And I will stay until the end to take questions, or you're also welcome to email me. My email address is on the slide there. It's eleanor.stinnett@ssa.gov. That's all for me, Derek.

Derek Shields: Thank you, Ellie, for the update on the Ticket to Work Survey and the forthcoming interviews. And we'll bring questions to you in our second Q&A. If we can go to the next slide, please.

It's now my pleasure to introduce Erinn Weidman. Erinn is also with Employment Support with SSA and has some important updates for everyone. Erinn, over to you, please.

Erinn Weidman: Good afternoon, everyone. I have a fair amount of updates and reminders for you today, but I will try to be quick. If you can go to the next slide, please.

So, first, I want to highlight two important annual requirements. The Annual Performance Outcome Report, or APOR, which is a mandatory report that measures EN performance. And the Security Awareness Certification, where staff must review and sign the 222 Form, and the Signatory Authority or Suitability Contact must submit the addendum listing all staff who have completed the certification. The collection process for both closed on February 23. Thank you to everyone that completed these requirements before the deadline. If your EN did not complete the APOR, the Security Awareness Certification, or both, our team has reached out to you directly, and we will be issuing cure notices soon. Your EN is at risk of termination from the Ticket Program, so please complete these requirements. If your EN did not complete the APOR and/or Security Awareness Certification and have questions about either process, please contact ENService@ssa.gov for assistance. And if I can move to the next slide, please.

Next, I'd like to discuss the essential kind of roles and responsibilities of the EN main points of contact. Understanding these roles is critical to ensuring compliance with Ticket Program requirements. So, first, let's talk about the Signatory Authority. This individual is the primary EN official authorized by SSA to represent and speak for the EN in all matters related to administration of the Ticket Program Agreement or TPA. The Signatory Authority is also the individual responsible for signing off on any TPA amendments. Next, we have the Program Contact. This role is the person who is responsible for overseeing all day-to-day operations of the EN. The Suitability Contact serves as the designated security officer and suitability liaison. So, this individual works with SSA on matters relating to system security, privacy, and employee suitability. So, their responsibilities include submitting and tracking those suitability applications. Ticketholder Contact is the main point of contact for Ticketholders who reach out to the EN regarding supports and services. This role also responds to all inquiries from SSA or TPM about currently assigned Ticketholders. Payments Contact is responsible for overseeing all aspects of payments, including managing payment inquiries from SSA or TPM and ensuring that there are accurate payment requests and records in the Portal. And then, lastly, we also want to mention the Ticket Portal user or users who manage Ticket assignments, status, and payments. So, the Signatory Authority or Program Contact will designate the Ticket Portal users based on your EN's business needs by submitting a TPA Change Form. And next slide, please.

If you are unsure who your EN main points of contact are, you can confirm this information by following these steps. So, you're going to log into the Ticket Portal. You're going to navigate to about your EN or SVR on the main screen, and you are going to select view directory information about your EN or SVR to review a list of all those contacts. If you are requesting changes, please allow at least 48 hours for the changes to be reflected in the Portal.

And then, my final reminder today concerns the use of your official legal name on all TPA suitability and training records. So, if an EN employee legally changes their name, we ask that the following steps be completed. So, first, your EN Company Point of Contact, so this would likely be your Suitability Contact or Signatory Authority, should notify the suitability team, specifically their SSA EN contractor Suitability Point of Contact. The Signatory Authority or Program Contact should submit a TPA change form, updating us on the person's new legal name. And lastly, the EN employee should report these changes to their local SSA field office in order to ensure that the SSA's mainframe records are updated. So please ensure that the full legal name is used on all official EN documentation, such as TPA change forms, suitability application, documentation information, and any kind of training requests.

So, for example, please ensure you're using Robert instead of Rob or Bob or Bobby. Using your legal name helps ensure consistency and accuracy across all official records and helps prevent delays. If anyone has any questions or concerns regarding that, please feel free to reach out to us. Additionally, we also ask that you always use your official business email address rather than a personal email address or a generic business email address, such as inquiries@myEN.com. This helps ensure that we contact you specifically. So please make sure to use your business email address. That concludes with my updates and reminders for today. If you have any questions regarding anything that I covered today, you'll be able to ask them during the Q&A session. Back to you, Derek.

Derek Shields: Thank you so much, Erinn, for these updates. I appreciate you being with us, and we'll be back with you in just a short little bit. Now we're on to our final presenter today. From TPM, we have the Director of Communications and Outreach. If we could move to the next slide, please. Thank you.

Jayme Pendergraft is with us, and Jayme has a couple updates and a demo or two to provide, and we look forward to having her also join us afterwards for our final and probably abbreviated Q&A. Thanks, everyone, for sticking with us. Jayme, over to you, please.

Jayme Pendergraft: Good afternoon, everyone. I have a lot of info to share, too, and I will try and do it quickly. Next slide, please.

We published and announce the Ticket Connection, Winter Edition, on January 21. It's available on the Your Ticket to Work website, and the link is being shared in the chat. The topics include a checklist for services and supports reviews, Ticket to Work evaluation, wage reporting, suitability updates, new Ticket to Work posters, and upcoming events. If you have any ideas for us, please contact ENOperations@ssa.gov for ideas for future additions. Next slide, please.

Next, I am excited to share that a new Ticket to Work promotional poster is now available for use in your outreach efforts. The poster was designed to help providers promote the program, ensuring a consistent and recognizable message. It can be downloaded directly from the marketing materials page. The resource is available in two sizes and can be used either as a poster or a flyer, giving you flexibility in how you share the information. We encourage you to print and display the poster in offices, community spaces, waiting areas, or partner locations to increase visibility of the program. It can also be used alongside other official brand-new materials to keep messaging consistent across outreach and communications channels. Using these materials helps ensure beneficiaries receive clear, accurate information about the Ticket Program, and you'll also get a link to the poster as well. Next slide, please.

We're happy to share our newest outreach video, Introduction to Ticket to Work. This short video highlights how the Ticket Program helps beneficiaries explore employment and work towards financial independence. You are welcome to use this video as an outreach tool to help explain the program to potential participants. We encourage you to share the video on social media, add it to your website, or use the video in presentations, and outreach events to help expand Ticket Program awareness. I'm now really excited to play the video for you all. Can we go ahead? Okay, I think in the interest of time, what we'll do is we'll go ahead and provide the link to the video on YouTube https://www.youtube.com/watch?v=oFeMvDUjneA. I know we only have a few minutes left. We encourage you to go watch the video. It will be added to the service provider toolkit. It will also be featured in a few places on the Choose Work website. And it is also currently one of our pinned posts on Facebook. So please do go take a look. And we apologize that we weren't able to get that sound out there. Let's go ahead and go to the next slide, please.

So now we will move on to our WISE webinars. In 2025, we produced and hosted 12 successful Work Incentive Seminar Event or WISE webinars, delivering an exceptionally successful year marked by record-setting growth in both registrations and attendance. More than 8,811 people attended, achieving an average attendance rate of 38%, representing a 43% increase compared to 2024. That's right, we had 2,643 more attendees in 2025 compared to 2024. And we're seeing this trend continue into 2026. Through our communications activities and with help from you, more than 130 organizations promoted the webinars on their communications channels. WISE webinars 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. We appreciate your help with promoting the WISE webinars. You really do make a difference. We encourage you to continue sharing our social media and other webinar announcements. And we also invite you to join us for our next WISE, “What is Ticket to Work,” next Wednesday, March 25. Next slide, please.

Today, this audience gets a special sneak preview of our newest website feature, a navigation tool to help visitors quickly find the information they need on the Choose Work website. I'm going to pause here to share my screen. And this is the development site. So please note that this is not published on the website quite yet. Hold on, just one second. So, the tool is designed to guide users through frequently asked questions about the Ticket Program. It is at the bottom right-hand side of the screen and currently has a new feature logo above a small message or chat bubble. Simple prompts help users identify what they're looking for, such as finding service providers or learning more about work incentives based on their selections. So, let's choose Getting Started.

The tool will provide short answers and direct users to the most relevant pages on the site so they can explore the topic in more detail. So, let's say I want to know what the Ticket Program is and get a really brief answer. And then I can click Learn More to get over to the About the Ticket to Work page. With that, I am going to stop sharing and provide a little more information about our navigation tool while the presentation gets reloaded.

The feature is intended to improve the user experience by making it easier to locate helpful resources without searching through multiple pages. The tool will go live this week, and we wanted to make sure you were the first to know about it in case Ticketholders have any questions. And of course, we always appreciate any feedback you have on the tool or other outreach content. Next slide, please.

Finally, we do invite you to share program updates, success stories, and resources on social media to reach a wider audience. You can follow and tag us on Facebook at Choose Work and X @ChooseWorkSSA. If you have an idea for a future blog post, we always welcome your suggestions. You can email ideas to ttwsocialmedia@ssa.gov, and you can help us keep the Choose Work blog fresh and relevant. Thank you for your time today, and now I'll hand it back over to Derek for our next Q&A.

Derek Shields: Thank you, Jayme, very much for the Communication and Outreach updates, including that demonstration of the new navigation tool. If we can go forward to the next slide, please. We will begin our second Q&A, and we have about 9-10 minutes for that. These questions could be positioned for the Employer EN model, the EN site visits, Ellie's presentation on the Ticket to Work Survey and interviews, Erinn's updates that she provided, or anything from Jayme on Communications and Outreach. We do believe right now that our unmute feature for callers may not be working, so we're going to encourage you to use the chat to ask any questions. Right now, I'm going to ask Brittney to come on to catch us up with what's happened in chat since we came over to meeting part two. Brittney?

Brittney: Hello there. Yes, we had a question from Kevin during Patrice's portion. He was asking, “Is it safe to assume that administrative ENs can have affiliates hire Ticketholders now?” Natalie confirmed yes to him. And there was a follow-up question from Deb. If this is effective immediately or do they have to wait until March 31 to assign those Tickets? And Natalie confirmed that she does not have to wait, she can start assigning now. We have another question that just popped up from Megan. “Can an EN share a success story in their own social media if the person has given written consent and a media release to do so?”

Derek Shields: Jayme?

Jayme Pendergraft: I apologize, Brittney. Could you just ask me that question one more time?

Brittney: Sure. “Can an EN share a success story on their own social media if the person has given consent and a media release to do so?”

Jayme Pendergraft: This is Jayme. I believe so, but I would certainly like to double-check with SSA on that one if someone can help answer that question. We certainly see ENs do it all the time.

Derek Shields: If we have a colleague from Social Security that would like to comment on that, my interpretation on that would be, “Can an EN share a success story in their own social media?” Well, there very well may be a success story that comes from the Communications and Outreach Team, SSA, TPM. That would certainly be okay. Otherwise, you should follow your own policy if that success story is one of your own employment outcomes. It should adhere to the TPA requirements and adhere to your own consent sharing. So, if you do not have a consent policy, then we would encourage you to consider that as well. Somebody else from Social Security — would you like to comment?

Patrice McLean: Derek, I definitely want to take that back to get confirmation. I know that when it comes to sharing success stories from SSA and TPM, we of course want to make sure that we're not sharing any PII, and I would recommend that ENs do the same because they couldn't share any PII. So, I love the answer you gave. I just want to make sure that we provide confirmation. Go ahead and get confirmation and then share that with all ENs once we take another look at it, internally.

Derek Shields: This is Derek. Fantastic, Patrice. Thank you. And Megan also says thank you, too.

Brittney: We have one more question from Angela. “For site visits, does everyone need to be there in person or can we attend virtually?” Natalie responded that they would prefer for the Signatory Authority and the Program Contact to be there in person. That is all the questions from the chat at this time.

Derek Shields: Thank you, Brittney. This is Derek speaking again. We do have time left. In fact, we just got our five-minute warning. We welcome your questions on the topics. Of course, if you do have other questions regarding the suitability clearance presentation from Vernon, we encourage you to submit those to our ENOperations@ssa.gov email address and we will get those to Vernon and ensure answers are provided, too. Otherwise, we have our other presenters with us and welcome your questions in chat at this time. At this point, we're not having any other questions, so I would prefer to use the time to provide some other updates. We can pause again if we receive a question, but at this point, let's move forward one slide.

I have some updates about some upcoming events. Well, we know Jayme provided some great updates on the WISE webinars. We do have some other activities planned. First of all, we'd like to share that in April, on the 15, about a month from now, the next EN Essentials supplemental training will focus on EN marketing. It's called All About Relationships, and we have a couple of objectives there. Both newer and seasoned ENs will discuss ways they engage with Ticketholders using a variety of marketing strategies to include outreach to specific target segments along with collaboration and partnership building, using that larger tent to figure out new strategies to include successful braided and blended funding strategies using that client base and different funding streams to partner with Ticket to Work services to really support successful outcomes — both for Ticketholders in our case — but also successful business outcomes for ENs as well. So that's our next upcoming event. We did have a couple questions pop up while I gave that, so I'm going to pause and bring Brittney back in to make sure we could cover those. Brittney?

Brittney: Sure. We have a question from Carrie. “If an EN does not have a physical location and they only work remotely, would site visits be to the Signatory Authority's residence?” Natalie stated that ENs are required to have a physical address.

Patrice McLean: And if I can add, we have conducted site visits to EN employees, to the Signatory's residence, if that is where they conduct their business. So yes, we have conducted site visits to residences in the past. Sometimes, the physical address is a residence. But if there is an office, we can visit that as well.

Derek Shields: Thank you, Patrice. From kitchen tables to attics. We've seen it all. The key there being, what's their physical address of record? That's where that visit would take place. Brittney, anything else?

Brittney: No other questions at this time.

Derek Shields: Thank you so much, Brittney. Let's go forward to the next slide, and we'll move to wrap up today's All EN Call.

Besides the EN Essentials, we have some other upcoming events. As Jayme said, March 25, next Wednesday, "What is Ticket to Work?" This is one of the most popular WISE webinars, and we appreciate your assistance in sharing that information on your networks through email and social media. Our next All Call will be the All VR Call on April 14. And then on the 15 of April, the EN Essentials I mentioned. And then April 22, we have our April WISE webinar. Of course, we share this information via GovDelivery, and please save the email address so these don't go to spam or junk mail. That's tickettowork@subscriptions.ssa.gov.

We have one last question. "When will written instructions about security clearance changes be provided to ENs?" Thanks, Kevin, for the question. We just received the guidance ourselves. We have, as Ana mentioned earlier, the Suitability Guide, which is a written form of instructions, and needs to be updated. Since we only received the updates from Vernon just a little bit ago, to be honest, the work hasn't begun. And we'll work to get that updated document out as soon as possible, along with the meeting minutes and transcript from today's two calls stitched together. So, we'll be back to you with the specific timeline, but we understand this new guidance is needed in written format as well, so Ana and team will be on it.

And with that, if we can go to the last slide, please. Our next All EN Call is on June 16 at 1 p.m. Please mark your calendars for that. We do encourage topic suggestions for All EN Calls, sending them to ENOperations@ssa.gov. We also appreciate your feedback on today's meeting at that email address. Thank you for joining today's call. We appreciate your patience and our presenters. And on behalf of the team, we welcome you to have a great afternoon. Take care.