



QUARTERLY ALL EN CALL TRANSCRIPT

SEPTEMBER 15, 2026

Derek Shields (Moderator): Welcome to today's Quarterly All Employment Network Call. My name is Derek Shields, and I am with the Ticket Program Manager, and it's my pleasure to serve as today's moderator. Before we begin with our agenda and presentations, I'd like to take a few moments to review our logistics and housekeeping items. Let's move forward to the first content slide, please.

First, this meeting is being recorded, and a transcript will be provided. Also, per the Ticket Program Agreement, Part III, Section 11, Subsection I, EN staff are not permitted to record this meeting or capture the transcript. Please do know that the materials from today's event will be posted to the Your Ticket to Work website for your access and use. Closed captioning is also available for participants who join using the MS Teams application or by using the separate closed captions link provided in your GovDelivery email announcement for today's call and also provided via a link in the chat for the meeting.

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Okay, we do appreciate you joining today, and we also encourage your participation and questions. Please feel free to ask your question in the MS Teams chat section. We will have two Q&A sessions today. If joining via phone and you wish to ask a question, you can do so through two steps. First, raise your hand using star 5, and then we'll be unmuting you and calling upon you. Then, to speak, you need to press star 6. So star 5 to raise your hand, star 6 to speak. If joining via MS Teams and you wish to ask a question out loud instead of using chat, please use the raise your hand feature, and your mic will be unmuted by our facilitator. Please limit your questions to one per participant so we can have everyone get their questions answered. Of course, additional questions or comments can be sent to us at enoperations@ssa.gov. Those questions not answered during the live event, or without answers to questions that are asked will be forwarded to the appropriate panelists so we can respond and ensure you get your answers. We do thank you in advance for your participation and especially for taking the time to join us today. With that, let's move forward to the next slide, please.

This is our agenda. Besides reviewing the logistics and some of those housekeeping items, we will welcome some new ENs first, and then I will introduce our first speaker. Rachel Vincent will be joining us today to review new forms SSA-821 and 820. And she'll have a walkthrough



presentation that will be directly followed by a Q&A session just for her content. Following Rachel's presentation and Q&A will be Erinn Weidman. Erinn will provide some important updates from Social Security for all ENs. Following Erinn, we'll welcome Ana Morales to review the suitability process, in effect, providing a process recap and some important resources to use to ensure successful suitability clearance participation. After Ana, we'll have Jayme Pendergraft providing a Communications and Outreach update with some important links and information. Erinn, Ana, and Jayme will be available in our second Q&A. That covers the agenda for this third quarter All EN Call. And with that, let me move forward to welcome our new ENs.

Today, we have four new ENs joining their first All EN Call. From New Jersey, we have the Center for Educational Advancement Inc. From California, we have Hope Services. From Oregon, we welcome Employment Options LLC. And from Massachusetts, we welcome ServiceNet Inc. These four new ENs join their first call and also join all of you as Employment Networks. We look forward to working with you to support more Ticketholders in their employment journeys to financial independence. And we appreciate the applause coming from our audience today, welcoming you as well.

Okay, with that, we've covered the logistics, we've welcomed the new ENs, and it's now time to move forward to introduce our first speaker. As mentioned, Rachel Vincent from the Employment Support Team at the Social Security Administration will now join us to provide a review and walkthrough of the new Forms SSA-821 and SSA-820. At this time, we'll bring the slides down, and we'll allow Rachel to share her screen to provide her presentation. Rachel, thanks so much for joining us. Over to you.

Rachel Vincent: All right. Thank you, Derek. Give me just a moment to get my screen up. And can everybody see it?

Derek Shields: I will confirm it is not up yet. Now, it is on the screen. You're good to go, Rachel.

Rachel Vincent: All right. Perfect. Thank you so much. What I'd like to share with you today is the new online conversational form that SSA released just a couple of weeks ago. As you know, there's a static form online that looks just like the PDF if you were to receive that in the mail. And with this conversational form, they try to make it more user-friendly, where if you answer no to certain questions, maybe you don't have to go on to the next area of the form. It takes you right down to the signature piece of the form. So I wanted to walk through that with you. And if you have any questions about that, I'm happy to try to answer them. So with that said, I'm going to be entering in validation as if this was my *my* SSA account. This is a fictitious human being, so there's no PII issues here. And so I'm going to just pretend that I am going in via *my* SSA. Let me get my password. I'm sorry about that. And then I'm going to log in. And this should look like your client's Social Security —*my* Social Security accounts should be mimicking that. And so I'm going to hit Next. And my name is Lynn in this scenario. And Lynn is asking if I would like to start a form. So in this situation, perhaps, I'm filing a new initial claim. I received a form



in the mail asking me to fill out some information about my work. Or I'm having a work CDR done, and the technician has sent me Form SSA-821. And so I decide that I'm going to go on here and fill it out online instead of mailing that paper 821 back into the office. So I'm just going to go in here and type in the 821, and it gives me the option here of completing the form online. And as you can see right away, this looks much different than that PDF form. It says, "Let's work on this together," and it explains what this form is. And it asks me to confirm my information, tells me the estimated time that it's going to take, and that my progress is going to be saved. And so it's going to give me 40 minutes to complete this form. Or it's going to give me more than that, but the estimated time is 40 minutes. Sorry about that. All right. So it just confirms all my information.

And then one of the first questions it asks is, "Are you blind?" and this is on our regular form. And for the purposes of this, I'm going to select No. Really, all the questions will stay the same after this. This is just asking this, perhaps historically. I have received Social Security Disability for one type of impairment, and now I have been found blind. Obviously, we would send it to the DDS to find out if maybe I'm eligible for that higher blind SGA limit. But all the other questions will be the same after this. So the first question is, "Have I had any work since my last review?" If I'm unsure about these dates for the last couple of years and if I say No to this — because the reason Social Security is asking about this is that they have some information showing that I'm working. But perhaps I really haven't worked. And something is showing up in IRS data, a pension or insurance payments or something like this that, you know. I can tell them about. It says, "Did you receive other types of income?" and I'm just going to hit Yes. And here's where I get to tell them maybe why something is showing up in their system. And I can put "other" and talk about my pension or my insurance payment here. But it allows me to tell that information.

Now, if I were to hit No, it says, "Do you have any idea why this — some earnings have been reported for you?" Maybe I have somebody who used my SSN fraudulently in the past, etc., that maybe I can say, yeah, I think maybe there's fraud happening here. But this gives us the ability, no matter what the scenario is, to tell us some more. But for the purposes of this, your folks have been working, and so they're going to want to tell us about their work. And so we're going to push Yes to this. Now, I'm going to go in here, and it says, "Let me know about each of your employers," so I'm going to start. Now, what would be wonderful is if it could propagate all the employers that we know about. We haven't advanced that far. But here's what we can do. So let's just say we started working at Walmart. And this is going to ask my direct supervisor. And I might go, you know what, I'm not sure what their name is. Or if you do, it's not going to be a full stop if you can't get through that. It's just a nice-to-have.

So we'll get to the next one. And again, this is not a — you don't have to know your supervisor's number. This is just in case you do have that information. And again, you don't have to know these things. You can skip right past them. In fact, let's do that. Then it's going to ask my job title. And I'm just going to say I am a stocker. And I'm making, let me say I live in one of those

states with a minimum wage of —I'm going to make that an hour. And I'm working 20 hours a week. And am I still working there? And if I select No, it asks me when I stopped working. And this is a nice question because I can say that I ended this work because of my disabling condition. Okay.

Question (Justin): Is this what beneficiaries can expect their *my* SSA account to look like soon, or is it a different system entirely?

Rachel Vincent: When they log into *my* SSA, they should have an option to fill out any of the conversational forms. And it just Upload Documents. So anything that's available on Upload Documents, Justin, if that answers your question.

All right. And so say I say because of my disability. Well, this is going to flag this case to know maybe there's an unsuccessful work attempt. So this is a really helpful question to have. But I'm going to go back, and I'm just going to say that I'm still working there for this. And here it's saying, "Please select the option below if it applies." I'm going to say that I am going to put some pay stub information on here. So let's go here. And it says, "If you work, did you also get other income?"

Question (Danielle): Can they complete the form even if SSA has not requested it?

Rachel Vincent: Danielle, that is a brilliant question. They can complete this form if no one has requested it. The issue being is the form is only meant to be filled out if SSA has requested it. So if they're doing a new initial claim, we can't establish an onset date without it, or if we have work and earnings information that indicates the person is making SGA or in their 9 TWP or making SGA after their 9 TWP and we have decided we need to review this, they should receive this form. If somebody sends in this form or completes this form online and we haven't requested it, it's going to get routed electronically to the office. But what happens then is a technician says, "I'm not sure why I'm getting this," because this is not what we consider, you know, a work report. This would be something that we're waiting on to have back. So if all of a sudden this shows up in your queue, you say, "I'm going to put this in an electronic folder, maybe I'll, you know, figure this out later," and go on to your next workload. And so it's not a good idea to send this in when it's not requested. Okay.

Question: Sometimes my clients have reported but have waited and waited for any follow-up. So the form has been used as a backup.

Rachel Vincent: Okay, I get that. I'm just letting you know that if they haven't requested it, there may not be any reaction to getting one, and then they're just maybe going to be frustrated when they get a request for the next one when we are doing a review.

Question: To clarify, only the beneficiary can complete these forms online?

Rachel Vincent: Correct. Yep, that is correct.

Question: How can a counselor help? Beneficiary would have to screen share?

Rachel Vincent: Right. If they feel comfortable having you help them, that's absolutely their choice to let us do.

Question: But it is evidence that they're trying to give all the details.

Rachel Vincent: Correct. I tell you what, the best way for us to know that a review needs to be done, if they have a *my* SSA account and can go online and input — it's not on the EN portal. Sorry. Sandra, this is behind *my* SSA. So this is your client's *my* SSA account. But if they go online and are able to put their pay stubs into myWageReport online, those earnings go directly into our system, and then we have a really fantastic program that runs up against that pay stub table and knows when somebody's in their 9 Trial Work Period or making SGA, and we're able to flag that case for a field office technician to start a review. All right.

Question: If you worked, did you also get any other income?

Rachel Vincent: And what this is, is that, yeah, you may have gotten a paycheck, but is there other income that either we need to deduct from this or add to it, right? So for instance, if you got some tips in addition to your regular pay, that might count toward SGA. Now, if you got some sick pay, maybe we deduct that from your earnings, but this gives them a chance to let us know about that. So for the purposes of this, I'm going to put No there to get to the next screen. All right.

"And do you get extra support, easier work?" And this is about a subsidy, and we're going to put Yes. We're going to say, "I need a little extra help." And it says, "Got it. For each employer, let's add a contact person." So here I'm going to try to add a contact person. And what's nice about this is it's going to, when I do a drop-down, it's going to pre-fill Walmart because that's what I had filled in before. So that's pretty cool. All right. Oh, and you know what? Here, it's pre-filled my supervisor Todd's name. And here it says, you know, if Todd isn't the person that we should get in touch with, put a different name here. But if it's Todd, great. We'll leave it there. So I'm going to put finish. And let me jump over to the questions here.

Question (Kim): Do you envision a client being able to add employment to their own SSA account? Then they can enter the wage info. Otherwise, they cannot until an agent adds it, which sometimes does not get added for whatever reason.

Rachel Vincent: Okay, that is a really good question, Kim. So unfortunately, right now, the system is set up so that we have to have an EIN to do a link between the two of them to get them on the record. So right now, they would have to get in touch with SSA and, you know, ask for that EIN to be added to their record. And then it should show up in their *my* SSA account. We would love, absolutely love; we've advocated for this for a number of years, but because of systems issues, they weren't able to make it happen. We would love for folks to just be able to



go on and add an employer and start adding their pay stubs. That's absolutely something we would love and have envisioned.

Question: How can a beneficiary input wages online if the employer has not been added?

Rachel Vincent: Okay. Yep.

Question: For best practice, what is the best way to report initial work to generate a work activity report from SSA to help avoid overpayments?

Rachel Vincent: So if they cannot go online and report their monthly wages yet because we don't have the EIN to the record, just knowing some simple information by the person, like having some pay stubs that come in and letting SSA know when you started working, the rate of pay. This can be done on the 1-800 number. It can just be written on a piece of paper. They can call the field office or come in. Of course, now you have to have an appointment for most places, but really knowing the employer's name, when the work started, the rate of pay, the hours, some of that very basic information. And if you happen to know the EIN, which a lot of people don't, that's really helpful, too. But that can get them at least into what we call a work report in the system. And the technicians are expected to turn their work reports into work reviews. And if that EIN is on there, that's going to open up the portal behind *my SSA* that you can go ahead and start entering those monthly pay stubs.

I'm not going to respond to the TPR piece of this. That's outside of my wheelhouse. So here, later on, somebody else can try to address that. Okay. Okay.

Comment: Field office haven't historically let my beneficiaries report work activity by phone. I've been assisting them.

Rachel Vincent: Yeah, they should be able to call the 1-800 number and report a work report.

Question: Is this for Title II or Title XVI? Just curious.

Rachel Vincent: Both. They should be able to do a work report where they generate a receipt. And if you're saying it won't let them, like, monthly bring in pay stubs, you know, for Title II, hopefully, if they just report the work and get that EIN on, they can be doing that behind *my SSA*.

Comment: Our region completed the required background screening.

Rachel Vincent: Okay. I don't know about that part of it. That's outside of my wheelhouse. I'll have to defer that question. All right. Cool.

Question: Are the pay stubs inputted by the ENs now showing up?

Rachel Vincent: We do have them in the system.



Question: Mailing or faxing the pay stubs?

Rachel Vincent: So when they're faxed or mailed in, the technician has to manually go into the pay stub table in eWork and type in every single pay stub. So that's what has to happen now for that program to catch it for a work review. If they get the pay stubs, that technician has to find time to manually go in and type in each of the pay stubs in the pay period, et cetera, pay stub table, and then it will get picked up by that program. And that's why I was saying the *my* SSA account goes directly into that pay stub table. All right.

Comment: It's just not very user-friendly.

Rachel Vincent: I hear you. Okay.

Question: But are they easily found?

Rachel Vincent: Okay. All right. I'm going to skip back over to the form, just to get through this. And then here towards the end, I'll start taking some more questions. All right.

"Does anyone outside your employer have first-hand knowledge?" So this is a good one, you guys, for all of the providers. You know, Employment Network representative, do they have some information about maybe some extra help you're getting? Well, yes. Let's see. Jennifer Juarez is a great contact for me. So I'm going to put her name in here. But anyway, you can see where I'm going with this is that they're now able to put a knowledgeable source in there so that we can contact you about any kind of extra help they might be getting. And did they make — this is about unsuccessful work attempts, you know, change to fewer hours, lighter work, and then it asks some information about that. For right now, I'm going to put No.

Next, impairment-related work expenses. "Did you pay for any services yourself?" And then I'm able to add my expenses. Say I said some meds here that I do all the time. It's ongoing. And I pay, let's say, \$150 per month for my medication. And I've been paying for them since I started at that job. All right. And here I'm just going to say, "Nope, there's nothing else I need to tell you." And I'm going to go to the next screen. And this is great. This allows me to drag and drop my pay stubs, any of my impairment-related work expense proofs, and any other relevant documentation. So all of this ends up coming through via the electronic system into the servicing field office. I don't have anything to drag and drop right here that doesn't have PII, so I'm not going to try to do that. I'm going to go and I'm going to review. And what it should do here is tell me all my information, my work incentive information that I filled out, my medication. And here it's actually going to upload it all into a form for me.

So here I actually have the paper form too now. So here it says, I'm not blind. "Have you started working?" "Yes." It should say Walmart. My supervisor's name is Todd. And there is that information. And it's going to ask me for my electronic signature here, that I've reviewed my documents, and confirm that the information is complete. And I am going to submit my claim.

And so let's see what happens here if we can get a confirmation. All right. So I'm going to go back to my dashboard, and it's going to welcome me again.

And let me go to 820. I'm just going to very, very quickly run through this because there's quite a few questions in here, and I want to make sure I can try to get to them. All right. So this is the 820 for self-employment. And Lynn is a busy, busy woman. She's self-employed and has another job. And if this form loads, here we go. So this looks very familiar. It looks a lot like — now, this one only says 30 minutes. And we'll get started. Telephone number, I'm going to put not blind on this one too. And it says, "Have you engaged in self-employment?" Again, if I hit No, it would ask me, well, do you — was it insurance payments? Is it something else? But for this, I'm going to say Yes. Now, one thing that you'll notice that's different here is on the — one thing that I think is helpful for the self-employment one is we pre-fill some IRS information that we know about the person. Like, say, 2025, we have that you made, you know, \$36,000. And then they're able to use that information to kind of start filling things in. Now, obviously, we can't pull that in. We can't propagate that right now. So in a future release, that would be awesome, but not for right now. And so this lets me add a business. So I'm just going to make something up here, LLC. I don't know the phone number, 123 Main Street, oh, Main. Well, we'll just have — it's just 123. All right, and this primary product or services: I'm a painter. And I work 80 or more hours a month on top of that other job at Walmart that I have. Super busy. All right. "And are you still doing this work?" "Yes." And then asks me about sole ownership, corporations, etc. And I'm just going to say maybe it's a gig work. "And tell us more about this." I'm just going to make some stuff up. All right, I'm going to go to the next. Do I have any tax documents? If I say yes, they want me to upload it. But I'm going to say no, because I don't. And then it says, for years, that I don't have tax returns; can I tell them about my gross? And so I'll just say, "Sure." I'm just — all right. And then, if I am currently self-employed, estimates going forward. 2026. All right, and then I'm going to go to next.

"Did anyone else have management responsibilities?" I'm going to put No for now. Did I make changes? This is going to be the exact same questions that we saw on the 820. This is going to ask about those IRWEs. It's going to look exactly the same as it did on the 821. Business contributions from others. It allows me to tell what the contribution was and who it was from. And then I'm going to hit Next. And of course, it's going to let me put any kind of other additional evidence. And it will let me review. And much like the much like the 821, it's going to let me preview what I've put in here. So as you can see, not blind. Yes, I am self-employed. I have an LLC, and all of that information should propagate in here and let me review it. And then I can say, Yes, I've reviewed this, and I can submit that form too.

And if you're interested, you know, there are other forms. There's a lot of other forms that you can actually submit in here. But this kind of looks like what your client's *my* SSA account would look like. So in addition to doing just an upload doc of the PDF forms, you can also do it this way.

So I'm going to jump over and start reading through some of these questions that started to come through for. Okay. All right. Where did we stop? Let's see. All right.

Question: I think many of my beneficiaries have extreme difficulties setting up *my* SSA accounts due to lack of cell phone and being able to answer and verify questions. Any suggestions on how to navigate that?

Rachel Vincent: I tell you what, I am not an expert on the *my* SSA side of the house as far as the password setup and things like that. I know that they have had units in the 1-800 number that are dedicated to trying to resolve those issues. So I know that the wait times, etc., with *my* SSA can be, you know, hit or miss. But I do believe that they had some people specialized in trying to help people with their *my* SSA account. But again, I'm not the expert on that.

Question: Can this be used in conjunction with a paper 821?

Rachel Vincent: I mean, sure. I mean, if they get it in the mail and they try to go online and send it in. Sure, they can do that if it makes them feel like, I mean, they could fill it out here and then print the PDF one and send that one in too so that they don't have to do it twice. So maybe that would be a suggestion is to just print the one that they do online when they do it electronically and then send it in via paper as well if that would make them feel more comfortable. Thank you, Kevin. Yep, we are trying. We know we're not perfect; that's for sure.

Question: Is there a place on my Social Security app that will store these documents in the event that — ?

Rachel Vincent: It will behind the scenes store this. We will have a trail that this came through, and they can store the documents to their computer. And it should have your history on here too. So I think if you saw up here, it has my history of what I've done online. So there is some sort of footprint to show what you've done.

Question: Since we should not direct beneficiaries to complete it when beneficiary receives a notice, does the request state — ?"

Rachel Vincent: Shoot, it just — sorry, it bounced up. Okay.

Question: Since we should not direct the beneficiaries to complete this without being requested, when a beneficiary receives a notice in the mail to complete the form, does the request state they complete it electronically?

Rachel Vincent: You know what, that is a good question because I don't know that when we did the 821 before that. I will have to look at the form, and I'm afraid if I pull up my screen, other things that I shouldn't share will pop up too. But let me go check out the 821, and then I can — when I do that all, I can put it in the chat after I stop screen sharing. I am going to stop screen



sharing now so I can go look at that, so. But let me look through some of these other questions. Let's see.

Comment: Perhaps it will generate a received your info reply.

Rachel Vincent: Sure, yes, you will get a receipt showing that you've submitted this.

Comment (Danielle): One of the vets screenshared while I was in his *my* SSA account because he has an overpayment issue that, while valid, has an SSA accounting error. We are working on this. His screen did not look like this.

Rachel Vincent: Okay, and that could be a validation issue. Perhaps they're working on something in real-time right now that is popping mine up a little bit differently. I'm not sure, Danielle.

Question (Sandra): For self-employment, when is the form processed?

Rachel Vincent: Sandra, I'm not sure I understand the question. If we have some IRS earnings on file that show that the person is working, you know, we could initiate a work review.

Question: Could this functionality be integrated into the EN Ticket Portal?

Rachel Vincent: I'm going to defer to my friends on that one. I'm not sure. Again, I'm not super involved in the EN, or I'm not involved at all in the EN portal, so I'm not going to speak to that.

Question: This form is also for DoorDash and Uber?

Rachel Vincent: Absolutely. The 820 is used for DoorDash and Uber, and we updated the form to make sure people understand that. A lot of people didn't know that that type of employment was self-employment, so we added gig work to it and then gave examples like being a delivery driver. So that was one of the enhancements that we made to the form, so good question.

Comment: Don't need to have all the information to complete the form. You said the customers don't need all the information to complete the form, but at the end, they are e-signing, stating that information is complete.

Rachel Vincent: Right, I hear what you're saying. I'm just saying that they may have just gotten the job, and they don't know who's going to be their direct supervisor yet or say they have no idea. They've never had to call this person before. They don't know what their phone number is. If they simply don't know it or don't have quick access to it, I think that they can sign it comfortably, saying it's complete to the best of their knowledge, right?

Question: For self-employment beneficiary, when is the form processed?

Rachel Vincent: I was informed that the only report — need to report at the end of the year when tax returns and did not know that they had a work review as well. You know, it's always



good to let us know if you started working. In fact, we request that you do. But as far as tax returns and things like that, I mean, you're not going to have those until the end of the year, but we can put an estimate on the record, and we can put as an allegation. It's just that you don't want to, you know, say, well, I allege that I'm going to make \$50,000 when in reality, the gross is only going to be \$6,000, you know. Okay.

Question (Mary): Can they exit and return?

Rachel Vincent: Yes, they can exit and return. I think the timeframe is 30 days, though, Mary. I think the timeframe is only for a window.

Question: Reporting new workplace, is that something that needs to be reported, or do they use the same section and continue submitting work activity as new workplace?

Rachel Vincent: If they receive this form to fill out and they started working somewhere new that they hadn't reported before, sure, they can add it to this. I'm not sure if that answers your question. Questions can be asked in the team chat or email. Okay, thanks, wrote a question. All right.

Question: Allegation or attestation, attestation, what is the best way to notify when a Ticket participator?

Rachel Vincent: Really, for them to give us a — you know, call the 1-800 number; they're supposed to be generating a work report receipt for you and putting that information in the system. You can, send something to the field office just stating that you started working, etc.

But I think that — I know that we were supposed to have a whole Q&A, but I feel like my Q&A got rolled into the chat. So I will pass it back over to you, Derek.

Derek Shields: Rachel, thank you so much for this walkthrough of the conversational Forms 821 and 820 for work activity and self-employment work activity. The walkthrough itself as a demonstration spurred great engagement and questions, some of which you were able to weave quickly in, others we've captured to take back to Social Security as well. For those that weren't answered, we'll be able to get those summarized and included in the recap. We do have other presentations to get to, so at this point I'd like to thank Rachel Vincent for being with us for the demonstration. There will be more questions, and we'll be here to support those answers. But as Kevin Nickerson said in chat, it's a great display of leveraging technology for business purpose and utilizing *my* SSA to do so. So kudos to SSA for that, and we're getting a lot of applause there. Rachel, thank you so much for your time.

Rachel Vincent: Thank you all so much. I appreciate you.

Derek Shields: Okay, and with that, Rose can go to the next slide. We will proceed with our next portion of today's All EN Call. It's now my pleasure to introduce Erinn Weidman. Erinn is also



with Employment Support in the Social Security Administration, and she has some important updates to share. Erinn, over to you, please.

Erinn Weidman: Okay. Good afternoon, everyone. So I have some information to share regarding the upcoming employment verification process and a refresher on the BPQY assistance process. So if you could go to the next slide. Okay.

So on October 5, we will begin the third and final employment verification for the 2026 calendar year. The employment verification, for those of you who don't know, is a process that ensures that SSA has up-to-date contact information and ensures that portal users maintain access to the portal. So it's going to be important that you complete this employment verification before the deadline of October 16. Failure to complete the employment verification before the deadline could result in your portal users being locked out of the portal. Nobody wants that. So we will send more information on the October employment verification very soon, so please keep an eye out for our GovDelivery messages on this. Next slide.

Okay. So I'd also like to take a moment to share an important reminder regarding BPQY requests that have been pending for more than 30 days. We understand that delays in receiving BPQYs can impact your ability to serve Ticketholders. So we have a process in place to help you follow up and resolve these outstanding requests. I'll give kind of a quick overview on how this process works. So first, if you have a BPQY that has been pending — or a BPQY request, sorry, that has been pending for more than 30 days, or if you receive an invoice for a BPQY, you can request our assistance. If it is your first time submitting an assistance request, we ask that you please email enservice@ssa.gov. In your email, do not include any personally identifiable information or PII. Please just state in your email that you are requesting assistance obtaining a BPQY and that this is your first time requesting assistance. The team will provide you with instructions on how to gain access to the appropriate government services online or GSO mailbox. We have a specific one for these assistance requests. And we will also send you the BPQY issue tracker form to complete.

So once you have access to the appropriate GSO mailbox, you'll need to fill out, again, that BPQY issue tracker, which is where you will provide the specifics on the BPQY request. And you will submit it, along with any BPQY invoices, if that is the issue that you were having, through GSO. So, again, all of that PII will be sent through GSO. Do not send PII via email. And then once we receive it, our Operations team will follow up with the field office on your behalf to help you or to help resolve these outstanding requests. So we will not be providing you the BPQY directly. The field office is still who will be providing you that BPQY; however, they normally send it to you. We're just reaching out to try to ensure that you get that requested BPQY. Once you've made that assistance request to us, if for whatever reason in 30 days you still have not received that BPQY, you can resubmit that — or the BPQY issue tracker with updated information through GSO. You can do that every 30 days until you receive the requested BPQY.



Hopefully that won't be necessary, though. Hopefully you will receive it after the first request, and we've had a lot of success with this process.

So please remember that all BPQY assistance requests must be for Ticketholders assigned to your EN, and the original BPQY request must be submitted to the correct servicing SSA Field Office. If you have some kind of agreement with a field office and you're sending them requests, that won't work as far as us following up. They have to be submitted to the correct servicing SSA Field Office. I hope this process will help ensure that you guys receive the BPQYs you need in a timely manner. If you have any questions about this process, please reach out to us, again, at enservice@ssa.gov. And that concludes my updates and reminders for today. Back to you, Derek.

Derek Shields: Thank you, Erinn, very much for the updates and reminders. We appreciate those details, and we will welcome you back for the second Q&A. This time we'll turn to our next presenter, and we welcome Ana Morales with the Ticket Program Manager. Ana will provide us with the suitability process recap. Ana, over to you.

Ana Morales: Thank you, Derek. Good afternoon, everybody. I'm just going to give a quick recap of the suitability process and allude to the March 2026 All EN Call that we had earlier this year where Vernon Collins gave a presentation about some changes with the suitability process and some forms that were updated. So for those of you that would like to refresh this knowledge, I will put right now the link of the Events page that we have on Your Ticket to Work website where you can find the first quarter of this year presentation, the transcript, the recap, and also the audio of that call. So you can hear Vernon talk about this firsthand.

But just to provide a quick recap, the suitability process changed, and it was a great change that Social Security implemented. They changed the process where the fingerprinting completion part of it is now the very first step that everybody should take even before submitting their application. So that is the first step. In the past, there has been issues of some individuals not completing this timely or not completing it at all. And that has definitely delayed the process for Social Security to go through every single step of it. So now putting the fingerprint completion before is taking care of some of those delays that have been in the past. U.S. Employment Network should be working with the individuals that need to go through this process. And they should be doing this on their time even before you submit that application to start a process directly with Social Security. There are updated instructions on how to do this fingerprint. And the presentation today includes a lot of different links that are going to be very useful to all of you.

The first one is the EN Personal Fingerprint Instructions that detail step-by-step all the different information on how to do it. So that's the first step. The person completes that. And once the person completes it, then the signatory authority or the suitability point of contact at each EN is the one that needs to complete that form. We added a bullet that if you are submitting an



applicant that previously worked under your Employment Network or another Employment Network, another SSA contract or is a former SSA employee, you can email your point of contact or the suitability mailbox beforehand to see if the fingerprints are required. In some cases, it may not be required. So for any doubts, you can always email your point of contact, which we added that information as well for you to have it handy.

There is also a new e-application or electronic application applicant listing that now includes a date where you can enter the regular information that you used to enter plus the date of the fingerprints that were taken. Once that is completed, you can submit it to Social Security along with the OF-306 form and the work authorization form if it's applicable to start the process. Let's go to the next slide. The EN CPOC or the Contractor Point Of Contact, which is normally the Suitability Point of Contact or the Signatory Authority at each Employment Network, are the ones that submit that package. And they have to send it to the Suitability Office directly. They also have a new email address that is the one that you'll see on the screen. And it's also very important for you to CC EN Service when you send that package. It has to be a password-protected email with compressed attachments. After the package is submitted, Social Security will send the e-app invitation, which is the questionnaire that asks several different pieces of information. And that will be sent from the mailbox that is on the screen, dchr.ope.css@ssa.gov. That mailbox is not monitored. So if you have any questions, please do not respond to that one. Go to your personalized point of contact that we're going to cover in a minute.

After the e-app invitation is submitted, the applicant has five days to complete it. The reason why the timeframe was cut from 10 to five is because now the fingerprints are done. And it shouldn't really take too long for every applicant to complete that information. There is also a sample on the website that everybody can respond in advance to make sure that they have all the information handy. And by the time they receive the link, they just go ahead and complete it. Let's go to the next slide, please.

This is the contact information. Of course, it's the main email address where you submit the package. That's where you can also request information. But Employment Networks have personalized point of contacts that can assist you: Janet Price, Angela Davis, and Courtney Jackson. Those point of contacts are based on your award number. The middle digit of that award number. Janet covers from 04 to 13. Angela covers from 14 to 15. And Courtney covers from 16 to 26. So I hope that by this time you have had some type of interaction with them. But they are the point of contacts that can assist you with the process in general, any questions that you may have, just to check the status of any applicant.

And the next slide is the resources. So we wanted to share all the different resources that are also included in the Your Ticket to Work website under the Forms section. We have the Suitability Guide. This guide was updated in April, right after the March Call where Vernon shared that information with all of us. I'm sorry. So the guide includes the step-by-step



instructions on what you need to do. All the different links and different forms, everything is updated. So you can go there to get the most recent information.

The Electronic Application Applicant Listing Form, like I said, one column has been added to it to include the fingerprint dates. So that has been also updated. The Declaration for Federal Employment OF-306, that didn't change at all. The Contractor Personnel Rollover Request Form, that hasn't changed as well. The personnel fingerprint instructions are also there; that didn't really change at all as well. There is also another resource, very useful, that is the list of acceptable documents for employment authorization. And also the standard Form 85, which are the questions and information that every applicant needs to complete in advance to be ready for the link whenever SSA shares that with them.

We want to make sure that you have all these links handy. We always recommend to not go to the forms that you saved last year or a couple of months ago, because they may change. So always go to Your Ticket to Work website to obtain the most updated forms that we have out there. Everything is updated with the correct information. We just want to acknowledge that the Suitability module that is part of the EN Foundations is not showing the proper order of fingerprinting first and then complete the forms yet. However, every time we have a learner that needs to go through the process, the EN Development and Training Team ensures that they know what is the proper order and shares all the proper documentation that they need to be successful on what they need to do. So with that, I'm going to pass it back to Derek and we will be available for questions at the end.

Derek Shields: Thank you very much, Ana, for the suitability process recap. We will have Ana back, as she mentioned, for the questions after our next presenter. And I know from comments and questions in chat, we'll have some for Ana. So at this point, let's go to the next slide and we'll proceed. I will introduce now and welcome Jayme Pendergraft. Jayme will provide our communications and outreach update. She is the Communications and Outreach Manager for TPM. Jayme, thanks for being with us. Over to you, please.

Jayme Pendergraft: Hi, everyone, and thank you so much, Derek. Can we head to the next slide, please? So today I want to highlight a new resource that's available for your outreach efforts. I know I've talked about it a couple of times, but we really want to encourage you to go ahead and access our promotional flyer. The flyer was created to help providers share information about the Ticket Program using clear, consistent Social Security branding. And it's designed to make your outreach easier while ensuring the people you serve receive accurate and trusted information. You can download the flyer directly from the Ticket to Work Marketing Materials page. It comes in two formats. One is a full-size poster, and the other is a standard flyer that you can print on a regular piece of printer paper. So you can choose the version that works best for your space or that you're able to print out on your own. You can also take it to a printer, and there are some directions on the Marketing Materials page about that. We do encourage you to print it and display it in your office, your waiting room, in community spaces like the library,



or even in a grocery store or any other partner locations where people may see it. It's a simple way to increase visibility of the program and remind folks that support is available anytime they're ready to explore work. You can also use the flyer alongside other official Ticket to Work branding materials to keep your messaging consistent across all of your outreach channels.

Now we're going to do a quick poll over in the chat, so I'm going to ask Katherine to please get that poll posted for us. Okay, Katherine did just post a link in the chat, and we do have a couple of quick polling questions about the flyer. You can either go over and click that link in the chat, or you can copy and paste it into your web browser. The poll is anonymous, so for those of you who haven't shared, don't worry. We don't know who you are, but we would love to hear from you. The questions are, or the statement is, I have displayed the Ticket to Work poster or flyer in my office. I have shared the Ticket to Work poster or flyer in my community. I displayed the Ticket to Work poster or flyer in my office and in my community, meaning you've done both or none of the above. So I'll give you a moment to complete that poll. If you haven't shared it yet, or even if you had, let us know in the chat how it's working for you or why you haven't shared it. You can also always send us an email at TTWsocialmedia@ssa.gov if you'd rather have a bit more of a conversation with the Outreach team about the flyer and why it may or may not be working for you. So we do want to hear from you. We appreciate your feedback, and it helps us understand how these materials are being used and where they may be making an impact.

All right, next slide, please. And thank you for taking a moment to fill out that poll, and like I said, please reach out and let us know if you have any additional thoughts to the email address that is also now in the chat.

So next up, I would like to remind everyone about our monthly WISE webinars. These take place on the fourth Wednesday of every month, and they're one of the best ways for Ticketholders and for all of you to get clear information about how work and disability benefits fit together. Our upcoming session is on September 23, so that's next Wednesday, and it's called "Debunking the Three Biggest Myths about Disability Benefits and Work." This webinar is going to break down the most common misconceptions about working while receiving Social Security disability benefits, myths that we know can create fear or confusion for the people you serve. And the session offers a straightforward guidance to help clients understand how work may affect their benefits, what safety nets exist, and how the Ticket program can support them as they explore employment. We also encourage folks to connect with service providers by providing a bit of a walkthrough of the Find Help tool and encouraging them to take that next step and follow that call to action to actually go online and find an Employment Network.

As service providers, I say it all the time, you play a key role in applying these resources, and we encourage you to promote the webinar through your newsletters, workshops, social media channels, and partner communications. The more visibility these sessions have, the more people can access information that reduces confusion and empowers them to move forward and connect with all of you. So we do please encourage your clients to attend live. That's where



they can ask questions and hear directly from us, and if they can't make it, all of our recordings are available on demand on the Choose Work Website. And of course, we want you there as well. Participating in the webinars can help you stay aligned with what we're saying from the Choose Work perspective and hopefully make it easier to reinforce the information as you're having conversations and appointment with Ticketholders. Next slide, please.

Lastly, I encourage you to stay in touch with us. We post very regularly on both Facebook and X. I'd encourage you to see that as built-in content that you can use on social media yourselves. You can share our posts; you can share any of the resources that we share. So on Facebook, we're at Choose Work, and on X we're @chooseworkSSA. And if you want to fill up your social media, just head over there and click share or repost, and you have a built-in social media content calendar just for you.

Lastly, we do encourage you to submit any blog ideas or any questions, feedback on the flyers or other marketing materials. You can send an email to TTWsocialmedia@ssa.gov. And I believe with that, that wraps it up. And I'll hand it back to Derek.

Derek Shields: Thank you, Jayme, for providing those Communications and Outreach updates and for providing the poll, which allowed some comment activity and questions in chat, which we'll bring up shortly. We are now entering the second Q&A. And as a reminder, on the screen, we have some ways to participate. You, of course, can enter your comments or questions in chat, and we've been quite active today, so we appreciate that. We'll be able to also answer a question if you want to out loud by using the raise hand feature, and you'll be unmuted and called upon by our facilitator. If you prefer to contact us through a telephone call, raise your hand by dialing star five. We'll call on you as you're unmuted, and you'll need to press star six, star five, star six. Please include your name, your first name, your Employment Network name, and then ask your question. And as a reminder, we do limit the questions to the focus of EN operations and outreach in nature. This is not a place to ask payments-related questions. We keep those for the All EN Payments Call. So at this time, I'm going to start by asking Brittney and our team. Brittney, chat's been very active with questions and comments. Recall that we have Erinn, Ana, and Jayme with us. Any questions that you could pull out from chat to pose for those presenters?

Brittney: Yes. Hi, Derek. One question we have, has all of the information regarding the suitability updates been updated on the suitability webpage?

Ana Morales: Yes. Everything has been updated. I posted the link for the forum section, and we can repost that information right now. Glynis, if you don't mind, where they can find it. Those are all the resources that are available. It includes forums, the Suitability Guide, and all that information that you need. So it has been updated. The only one, again, that hasn't been updated with the new process of doing fingerprinting first is the module. But other than that, everything else is updated.



Brittney: Okay. Another one was, we just had two applicants complete suitability last month, but their email stated that they received 10 days to complete. Will they receive an update saying five days?

Ana Morales: Yeah, I saw that one. The new process that was shared is supposed to be five days. I'm not sure why it's saying 10. But I will say, since everything is in place, take the five days to complete that link as soon as possible.

Brittney: Okay. Next question is about BPQY. It was stated that you can only ask BPQYs on Ticketholders who have been assigned to the EN. However, we need to have IWPs done before assigning, and we need BPQYs to create the IWP. Is that correct? Or am I misunderstanding? That was a question from Debbie. I don't know if she would like to come off mute.

Jayme Pendergraft: I can answer this. So I want to clarify that we ask that you only request assistance obtaining BPQYs for Ticketholders that you are serving as an Employment Network. So, we're not necessarily looking that, you know, that they have been assigned at the moment, you know, that you submit the request. You know, if the Ticket has not been assigned for whatever reason, but that is the intent. If the intent is that you are serving this Ticketholder through your Employment Network, then we can provide assistance. What we don't want you to do is, you know, request assistance for — or use this process to request assistance for a BPQY that you're obtaining for a program completely outside of your Employment Network.

Brittney: Thank you. There was also a question that Erinn answered in chat that I was going to say, can a beneficiary request a BPQY through their *my* SSA account? And Erinn confirmed that they cannot request that through their *my* SSA accounts. The other question is for Jayme. Can we add our Employment Network contact information to the flyer?

Jayme Pendergraft: Hi. Yes. Thank you for that question. I know we've gotten it before. Yes, you can. I know there may not be a ton of room, so we may need to go back and discuss how we can get your contact info a little more space. But as long as you do not cover up any of the text or the QR code on the poster, you can add your EN contact information to the flyer, and I hope that helps.

Brittney: Thank you, Jayme. We have another question that just came in from Sandra. I have received BPQYs with employment errors. Is there a process to follow up or get the report updated?

Derek Shields: This is Derek. Let's see if we can bring Erinn in on that one. Brittney, can you repeat the question, please?

Brittney: Yes. I have received BPQYs with employment errors. Is there a form or process to use to get an updated report?



Erinn Weidman: Sorry about that. I couldn't get off mute. I'm going to ask if you're having a specific issue with a BPQY, if you can send us an email. So, go ahead and email the EN Service and let them know you're having an issue with a BPQY you have received. Again, please do not include PII in this email. Just let us know that you're having an issue, and then we'll reach out to you in a secure manner to obtain the information we need to look into the issue.

Derek Shields: Thank you, Erinn. So, Brittney, I'm going to ask you to pause for one moment, and we're going to jump over to Katherine. We have a raised hand. Katherine, can you help the question be called upon, please?

Katherine: Absolutely, Derek. Hi, Amber, so you have audio access if you want to go ahead and unmute and ask your question.

Amber: Yes, thank you. And is it allowed for me to ask two questions, one about the BPQY and one about the flyer?

Derek Shields: Thank you for asking in advance. Yes, two different questions. Let's do it. Go ahead.

Amber: Okay, wonderful. Thank you. As far as the new request process for a BPQY, was there guidance sent out on what that new process is? And if it was, which I'm sure it probably was, who would it have been sent to? Because I haven't seen anything come through, and I want to make sure that I am doing what is required.

Erinn Weidman: Yeah, so this is not necessarily a new BPQY request process. You will go ahead and request BPQYs the same way you always have, and you'll make your original request to the appropriate servicing SSA field office. The process that I kind of spoke about today, which we've had in place for a while, is specifically in situations where you have a BPQY that you requested, you know, more than 30 days ago, or you have a BPQY that you requested, and you received an invoice for. In those circumstances, we can assist you in — by having operations reach out to that servicing field office for you, to hopefully help expedite that process and get that BPQY to you faster. Again, we don't send the BPQY to you. It's still going to be the field office who does that. So again, this is just a process. If you're having an issue getting a BPQY, we can help with that. And if it's your first time doing that, then again, go ahead and email EN Service and let them know that you want assistance — or you want assistance with a BPQY you've requested, and they'll send the information to you about how specifically to do that.

Amber: Wonderful. Thank you so much for that. I appreciate it. I haven't been in that situation, and I hope that doesn't occur, but at least I know that's available. Thank you so much. And then as far as the flyer, I did hear your response to the other question in which we can put our contact information on the flyer, but not to cover up any text or any photos. Would we be able to create our own flyer taking some of the components from your flyer, like the QR code or maybe some of the graphics to build our flyer ourselves? Is that a possibility?



Jayme Pendergraft: This is Jayme. I think I would have to take that question back to SSA to discuss it a little bit further. So Amber, if you can send — I think it was Amber. I'm sorry. If you can send an email to TTW social media with your request, we'll get some information for you and follow up.

Amber: Awesome. Thank you so much.

Jayme Pendergraft: No problem.

Derek Shields: Thanks for the questions, and thanks for that response, Jayme. Based on a couple of the comments in the chat, there's multiple ENs that feel the same way. So getting that question responded to for the recap will allow many ENs to be able to address a similar strategy that Amber was bringing up there. Thank you for that. Reminder, we have about 10 minutes left to our 90 minutes conclude. We do have time for more questions. Please use the raise your hand feature if you'd like to ask your question out loud. We'll call upon you or continue to use the chat. I'll circle back now to Brittney to check in to see if we have other unanswered questions that we could pose to Erinn, Ana, or Jayme. Brittney?

Brittney: No other unanswered questions at this time, Derek.

Derek Shields: Thank you. We'll pause on that for a minute to make sure that if anyone has a question to ask, you have the time to do so. Brittney, looks like we might have just had a post in chat. I was looking to the side when it maybe came in and we were talking. You might want to see if that one was checked already.

Brittney: That question was similar to the one that Erinn asked to reach out to EN Service. It's a specific question. So this is another one where they need to get an updated report. So I would request that they contact EN Service regarding that question as well.

Derek Shields: Thank you. And to reinforce Erinn's guidance, if you have any specifics for this, do not include the personally identifiable information, just the basic needs to get BPQY technical assistance, and then EN Service and SSA will follow up appropriately without any PII in that email to EN Service. One last call. Looks like we're not getting any questions in. We'll give it another 15 seconds. Looks like Carmen has one regarding fingerprinting. I'll go ahead and read it. "I've completed the required background screening and fingerprinting process for staff members, several, but has not received any updates or next steps and instructions. What action should we take to confirm the status of their screenings and move the process forward, so we continue offering Ticket to Work services?" Call on Ana to come in and offer a response for Carmen's question.

Ana Morales: Yeah, Carmen, I will definitely contact my direct point of contact for your EN. If you don't know who that is, I'm going to post the three individuals that are covering Employment Networks. Remember that it is based on your award middle digit. And I will start



from there. They are the ones that should be able to help you to see what's the status of the process.

Derek Shields: And Carmen says thank you. We appreciate that. Yeah, we encourage you to use the points of contact in the Suitability Office in order to get your direct information. If we have another question, we can take that. In the meantime, I'll read two comments that have come in. Appreciation to all of you for opportunities for open conversation and updated processes and information to help us all assist our customers. That was one. And then another comment from Cynthia. "Thanks to all for this info and discussion. Always appreciate your efforts to share information." And while we have a couple minutes to the hour, the questions have concluded. And at this time, I'll move forward to provide a couple other updates and then wrap up the All EN Call. Next slide, please.

As Jayme mentioned, we are pleased to host a WISE Webinar on September 23, one of the popular ones, "Debunking the Three Biggest Myths About Disability Benefits and Ticket to Work." We encourage you to share this information and thank you all for continuing the rise in beneficiary registrations for our WISE Webinars. Your help allows us to reach more people, which helps you, in effect, get more inquiries about Ticket assignments, too. Afterwards, if you like, you can, of course, check out the Ticket to Work calendar. We will be continuing to update that for future events for the balance of the calendar year. Also, to ensure you receive important emails, we have another reminder. We share information through GovDelivery messages, including the Ticket Portal issues and outages. Please save this email address so those messages do not go into your spam or junk email boxes. That is in chat, but it's also tickettowork@subscriptions.ssa.gov. Okay. Next slide, please.

And on behalf of our presenters from Social Security, including Rachel Vincent for the great walkthrough of the new conversational forms, and my colleagues on the Ticket Program Manager team, along with Erinn Weidman, I'd like to thank you all for attending and engaging in this third Quarterly All EN Call. The meeting transcripts and recap will be posted within two weeks on the Your Ticket to Work website. And as we have on the screen, the next Quarterly All EN Call will occur on December 8 at 1:00 p.m. Eastern Time. We encourage your feedback and your topic suggestion for All EN Calls. Please email us at ENOperations.ssa.gov.

Thank you all for attending today's All EN Call and have a safe and pleasant afternoon. This All EN Call has concluded.