INDIVIDUAL WORK PLAN (IWP), TWO-WAY COMMUNICATION, AND PAYMENT REQUIREMENT CHANGES

Social Security is pleased to announce changes to the two-way communication requirements as they relate to the Individual Work Plan (IWP), Services and Supports Reviews, and payments, effective December 1, 2026. Social Security is revising the Employment Network (EN) requirements for two-way communication as follows:

- During the first year of Ticket assignment, ENs will be required to have two-way communication with Ticketholders on a **quarterly basis**.
    - Acceptable methods include, but are not limited to, in-person meetings, telephone conversations, personalized email or text messages, voicemail message received from the Ticketholder, computer or telephone-based applications, and personalized letters exchanged between the EN and the Ticketholder.
    - In the event the EN does not maintain the required two-way communication with a Ticketholder for the first year of Ticket assignment, the EN shall unassign the Ticket no later than 180 days from the date of EN's last successful two-way communication with the Ticketholder.
- After the first year of Ticket assignment, the EN will be required to continue quarterly two-way communication if the Ticketholder has not completed the Initial Job Acquisition Phase (Phase 1 Milestones).
- After the first year of Ticket assignment and after the Ticketholder completes the Initial Job Acquisition Phase (Ongoing Employment Support – Phase 2 Milestones through Ticket Unassignment), the EN is required to have two-way communication with the Ticketholder on an **annual basis.**

Reminder: The EN shall document the method and date of each communication and, where possible, retain supporting evidence of the communication. Social Security strongly recommends that ENs retain as much documentation and evidence of two-way communication as possible. The EN shall provide such documentation and evidence upon request during Services and Supports Reviews and other reviews conducted by Social Security and/or the Ticket Program Manager (TPM).

- Social Security is eliminating the Proof of Relationship requirement for Phase 1 Milestones 1-3.
- Social Security will process all payments for eligible ENs based on information posted to Social Security's databases.
- ENs interested in proactively requesting payments may submit payment requests through the Ticket Portal. If Social Security does not have earnings information available to substantiate the payment, ENs must submit verified proof of earnings (e.g., paystubs, The Work Number, etc.).

Social Security will no longer require ENs to:

- Unassign Tickets that are in the Ongoing Support Phase if the Ticketholder does not maintain two-way communication. However, Social Security strongly suggests that ENs document communication attempts for their own recordkeeping purposes.
- Provide a discussion summary on the IWP; however, the EN must document the date, modality, and EN interviewer's name on the IWP.
- Describe a short- and long-term goal; instead, the EN and Ticketholder should document an employment goal developed with the Specific, Measurable, Attainable, Relevant, Time bound (SMART) aspects that show progression toward financial self-sufficiency.
- Use the Ticket Portal to request Phase 1 Milestone 1-3 payments. ENs may still submit payment requests with paystubs and wage evidence through the Portal; however, submission through the Portal is now optional.

Social Security is finalizing a new IWP template (Form SSA-1370) and updating the Ticket Program Agreement (TPA) to reflect these changes.