



TICKET *to* **Work**

**Thank you for joining
today's EN Essentials
Training Session.**

We'll begin at 1 p.m. ET.

**You will not hear audio or see captions
until we begin.**





TICKET *to* Work

EN Essentials Training Series

Optimizing Ticketholder Intake

July 12, 2023



Agenda: Optimizing Ticketholder Intake



Welcome and Logistics



Introductions



EN Guide and EN Essentials Training Events



Intake Process



Questions & Answers

Logistics

- Please feel free to ask a question in the [MS Teams chat section](#).
- If joining via phone and you wish to ask a question:
 - Raise your hand using *5 and you will be unmuted. Press *6 to speak.
- If joining via MS Teams and you wish to ask a question aloud:
 - Raise your hand and we will unmute your mic.
- Please limit questions to one per participant. You may send additional questions or comments to: ENOperations@yourtickettowork.ssa.gov.
- [Closed Captioning is available for participants who join using the MS Teams Application or by using the Closed Captions link provided in the GovDelivery email announcement for today's call.](#)
 - To turn on Closed Captions in MS Teams, go to the three ellipses at the top of the MS Teams window and click on “More Actions” and go down the list to “Turn on live captions.”
 - When using the link option, paste the link in the browser and it will open a separate window to view Closed Captions.

Training Team

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EN Guide for Working with Ticketholders

New resource with tips and details about:

- Conducting a thorough intake discussion with a Ticketholder
- Creating and updating a detailed Individual Work Plan (IWP)
- Assigning and unassigning Tickets
- Preparing for IWP and Services and Supports Reviews

[EN Guide for Working with Ticketholders](#)



EN Essentials

Upcoming learning events

- Align with the Ticketholder Intake and IWP content included in the guide:
 - July 12: Optimizing Ticketholder Intake
 - August 23: Developing and Maintaining Successful Individual Work Plans (Part 1)
 - September 20: Developing and Maintaining Successful Individual Work Plans (Part 2)

Intake Requirements for the IWP

An EN must document that a one-on-one individualized discussion with the Ticketholder occurred that focused on career planning, development of goals and the services and supports the EN will provide to the Ticketholder.

Documentation must include:

- Discussion date
- Modality (e.g., face-to-face, telephone, etc.)
- Location
- Duration
- Name and position of the EN interviewer (interviewer must have suitability)
- Summary: three to five sentences describing the highlights of the intake discussion

Discussion Summary Examples

Example 1:

I met with Victor and reviewed labor market information specific to the paralegal field. Victor is eager to pursue a career as a paralegal, is currently enrolled at Texas A&M University Kingsville and has 15 credits left to obtain his degree. Victor would like to secure an administrative position at a law firm while he completes his education. ABC Works will assist with Victor's pursuit of employment, his degree, and any additional certification to further his career advancement and retention.

Discussion Summary Examples

Example 2:

During our discussion, Carla expressed her motivation and interest in becoming financially independent and shows determination towards reaching her goals. Carla is currently working part time at Walmart and her prior work history in management supports her goal of becoming a manager at Walmart. Carla needs reliable transportation to work full time. ABC Works will help Carla obtain transportation so she can maintain her position at Walmart and will locate additional managerial training, so that Carla is fully prepared when a management position becomes available.

Ticketholder Intake

The purpose of the Ticketholder Intake conversation is to:

- Determine the Ticketholder's eligibility for the Ticket to Work (Ticket) Program
- Decide jointly whether your EN and the Ticketholder are a good match
- Ensure that your EN can provide the necessary services and resources for Ticketholder success

Helpful resource: [Informing Beneficiaries of the Goals of the Ticket to Work Program: Employment, Benefits Reduction and Self-Sufficiency](#)

Key Questions

- Has the Ticketholder considered their employment goals?
- Does the Ticketholder want to become financially self-sufficient?
- What is the skill and education level of the Ticketholder?
- Does the Ticketholder have any previous work and earnings history?
- Is the Ticketholder likely to make it to Trial Work Level (TWL) and then to Substantial Gainful Activity (SGA) level earnings?
- Do your services match the Ticketholder's needs?



Identifying Barriers to Success

- Take time to identify:
 - Any Ticketholder limitations
 - Ticketholder short-term and long-term employment goals
 - Strengths and competencies that will help the Ticketholder overcome obstacles
 - Any fears of potential loss of benefits

- *Helpful resource:*

[Debunking the Three Biggest Myths About Disability Benefits and Work](#)



Debunking the Three BIGGEST Myths about Disability Benefits and Work

There are several common myths about how working will affect disability benefits and Healthcare coverage. Here are the three most common and why they are wrong.

If I try to go to work, I will automatically lose my Medicare or Medicaid.

This is a myth. First, as long as you keep receiving a benefit check of any amount, you will keep your health insurance. If you earn enough that your Social Security Disability Insurance (SSDI) checks stop, Medicare can continue for up to 93 months. If you currently receive Medicaid, you should be eligible to continue to receive Medicaid even after you stop receiving Supplemental Security Income (SSI) benefits due to work. To be eligible you need to meet certain requirements, which include earnings below a threshold amount set by your state. Even if your earnings exceed the state threshold, you may still be eligible and should talk to your state Medicaid office. For more information about Keeping Your Medical Benefits after cash benefits stop, visit ssa.gov/redbook and socialsecurity.gov/disabilityresearch/wi1619b.htm.

If I use my Ticket to go to work, Social Security will conduct a medical review of my case, and I will lose my benefits.

This is also a myth. Social Security ordinarily reviews your medical condition from time to time to see whether you are still disabled, using a process called the medical Continuing Disability Review, or medical CDR. If you participate in the Ticket program with either an Employment Network or your State Vocational Rehabilitation Agency, and make "timely progress" following your individual work plan, Social Security will not conduct a review of your medical condition. If a medical CDR has already been scheduled for you before you assigned your ticket, Social Security will continue with the medical CDR.

If my checks stop because I go to work and then I have to stop working because of my disability, I will have to reapply for benefits all over again. It took me forever to be approved for benefits and I cannot afford to wait that long again. As a result, I should not try to work.

Again, it's a myth. You will not need to reapply if your benefits ended within the past five years due to your earnings and you meet a few other requirements, including that you still have the original medical condition or one related to it that prevents you from working. This is a work incentive called Expedited Reinstatement. You may even be able to receive up to six months of temporary cash benefits in addition to Medicare or Medicaid coverage while SSA conducts a medical review to determine if your benefits can be reinstated.

For more information about Expedited Reinstatement, visit socialsecurity.gov/disabilityresearch/wi1619r.htm.

Learn more

For more information about these or other Social Security Work Incentives, contact the Ticket to Work Help Line at 1-866-968-7842 or 1-866-833-2967 (TTY). For more information about the Ticket to Work program or to access the service provider directory, visit socialsecurity.gov/work.



Follow the Ticket program's Choose Work on social media!

Contact the Ticket program:
choosework.ssa.gov/contact

Like us on Facebook!
[@ChooseWork](https://www.facebook.com/ChooseWork)

Follow us on Twitter!
[@ChooseWorkSSA](https://twitter.com/ChooseWorkSSA)

To view online and access the resources linked in this fact sheet, please visit: <https://choosework.ssa.gov/library/debunking-the-three-biggest-myths-about-disability-benefits-and-work>

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Elements of a Great Ticketholder Intake

1

Build a Relationship

2

Listen

3

Manage the Dialogue

4

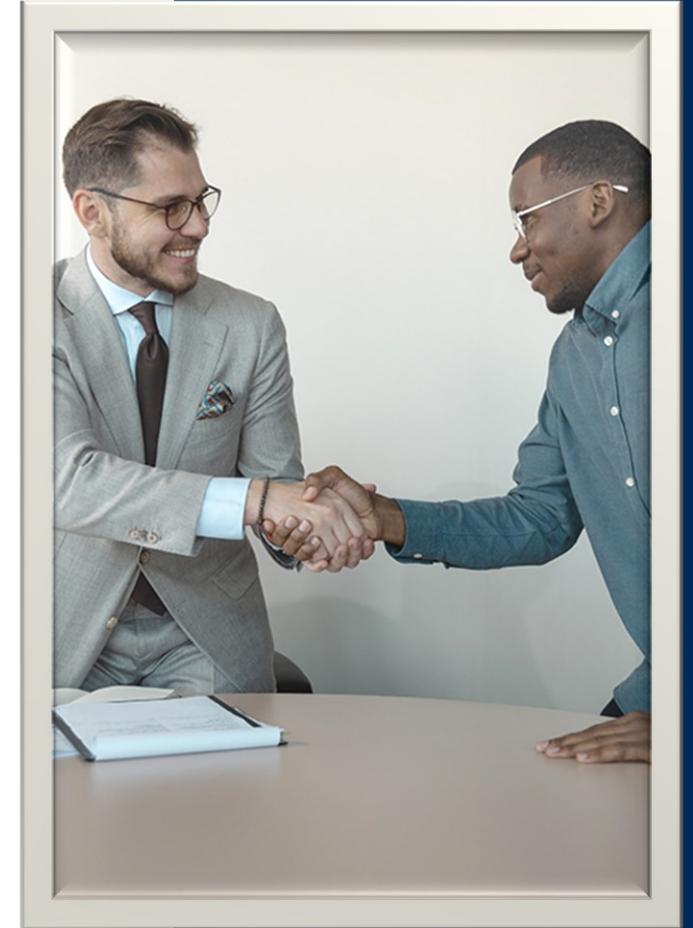
Treat the interview as a conversation

5

Look for the best fit

Build a Relationship

- Start with small talk to make the Ticketholder comfortable.
- Move into asking about the Ticketholder's employment and hobby interests, as well as their concerns with starting employment or participating in the Ticket Program.
- Develop a rapport before moving on to more personal topics.



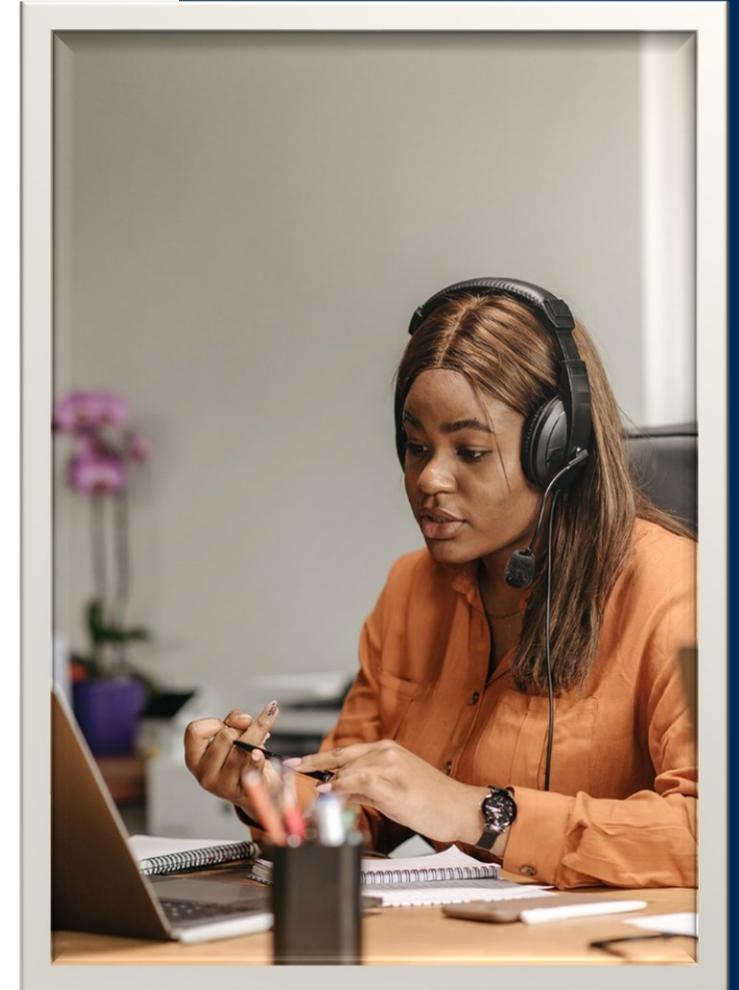
Listen

Use active listening techniques and let the Ticketholder do most of the talking.

- **Pay attention:** Do not interrupt the Ticketholder while they are speaking or fixate on what you will say next.
- **Be Patient:** Do not rush the Ticketholder to avoid missing important information.
- **Observe:**
 - In person: eye contact, tone of voice, posture and facial expressions
 - Virtual: listen for clues such as voice inflection, significant pause, etc.
- **Paraphrase:** Restate what the Ticketholder has said in your own words.
- **Clarify:** Ask clarifying or probing questions if you do not understand or want to learn more.
- **Summarize:** Pull together key points from the conversation.

Manage the Dialogue

- Use a combination of open-ended and close-ended questions to direct the conversation.
- Use “yes” or “no” questions to clarify or to gain information about topics such as disability status or criminal background.
- Use open-ended questions for topics such as accommodations needed to support their participation in the Ticket Program and/or employment.
- Use dollar figures instead of Trial Work Level (TWL) or Substantial Gainful Activity (SGA) jargon.



Treat the Interview as a Conversation

- Ensure that the questions flow and are connected.
- Build in follow-up questions for the Ticketholder's responses to either dive deeper or bridge to the next topic.
- This technique will support a natural conversation that discovers
 - interests, experiences, goals, dreams
 - supports and services needed to achieve goals and dreams



Look for the Best Fit

- Understand the Ticketholder's needs and determine whether your organization is a good fit for the Ticketholder.
- If the Ticketholder is not a good fit for your organization, provide a warm handoff directly to another known EN (or VR if more appropriate).
- If another EN is not known, refer the Ticketholder to both:
 - Choose Work website: <https://choosework.SSA.gov>
 - Beneficiary Support Help Line: 1-866-968-7842 or 1-866-833-2967 TTY
- If possible, follow up with the Ticketholder within a few days to confirm they connected successfully with another service provider(s).

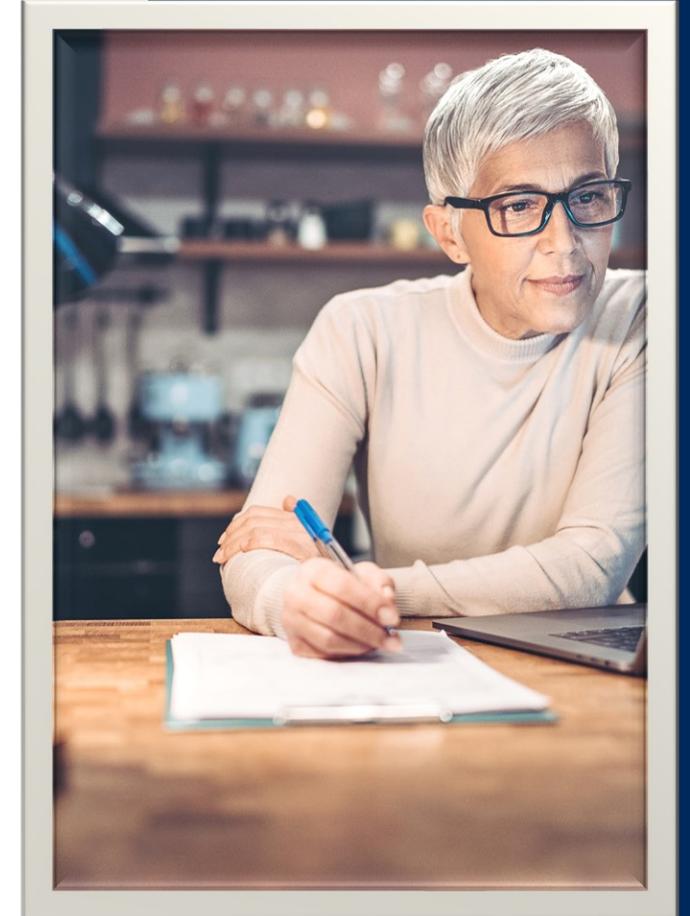
Next Step – Individual Work Plan

- If both the Ticketholder and EN mutually agree they are a good fit, the next step involves developing an Individual Work Plan (IWP) that ultimately leads to Ticket assignment.



Reflection

- What would you like to change or add to your intake process now that you have received this new information?



Questions

Resources, Part 1

1

[What is Social Security's Ticket to Work Program?](#)

2

[Debunking the Three Biggest Myths about Disability Benefits and Work](#)

3

[Informing Beneficiaries of the Goals of the Ticket to Work Program: Employment, Benefits Reduction and Self-Sufficiency](#)

4

[Ticket to Work Intake Tool](#)

Resources, Part 2

1

[The Choose Work Site](#)

2

[Find Help Tool](#)

3

[Beneficiary Support Help Line](#)

Save the Dates

- All EN Call:
 - August 22
- EN Essentials learning events:
 - August 23: Developing and Maintaining Successful Individual Work Plans (Part 1)
 - September 20: Preparing and Maintaining Successful Individual Work Plans (Part 2)

Contact the EN Development and Training Department

- Do you have feedback, recommendations and/or ideas for future EN Essentials Training Sessions?
- Email ENOperations@yourtickettowork.ssa.gov