

TICKET
to Work | **EN Essentials**

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

We'll begin at 1:00 p.m. ET.

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



TICKET *to* Work | ENEssentials

Preparing Successful Individual Work Plans (Part 1)

August 23, 2023



Agenda: Preparing Successful Individual Work Plans (Part 1)



Welcome and Logistics



Introductions



EN Guide and EN Essentials Training Events



Preparing Successful Individual Work Plans (IWP)



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:
 - Press *5 to raise your hand and we will unmute your phone. 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; click on "More Actions"; then scroll down the list to click on "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.

Presenters and Moderators

Derek Shields, PMP

*Senior EN Development and Training Manager
Ticket to Work Program Manager*

Mary Kay Murphy, PMP

*Program Integrity Senior Quality Manager
Ticket to Work Program Manager*

LaKesha Hunt

*Program Manager
Ticket to Work Program Manager*

Tiffany Beamon

*Senior Quality Analyst
Ticket to Work Program Manager*

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

EN Essentials learning events align with the Ticketholder Intake and IWP content included in the new EN Guide for Working with Ticketholders:

Upcoming learning event:

- September 20: Putting the Ticketholder's Individual Work Plan into Action (Part 2 of 2)

[EN Essentials Learning Events -yourtackettowork.ssa.gov](https://yourtackettowork.ssa.gov)

Overview: Preparing Successful Individual Work Plans (Part 1)

- 1 What is an Individual Work Plan (IWP)?
- 2 Components of the IWP
- 3 Discussion Arrangements
- 4 Individualized Employment Goals
- 5 Services and Supports the EN will provide
- 6 Required Signatures

What is an IWP?

- Written and signed agreement between a Ticketholder and an EN
- Developed in partnership with EN and Ticketholder
- Outlines the Ticketholder's employment and educational goals
- Details support services the EN will provide to assist the Ticketholder with meeting their goals
- Ticketholder and EN rights and responsibilities (Terms and Conditions)
- Living Document
- Prerequisite to Ticket assignment



Reminder: All IWPs should be individual for each Ticketholder. SSA will not recognize IWPs consisting of pre-printed and/or standardized goals; services and supports applicable to all Ticketholders are not permitted. In addition, SSA will not recognize any online documents completed by beneficiaries prior to one-on-one discussions with the EN as IWPs.

IWP Required Components

- All the required information is contained in the IWP 1370 Form in the sections identified below.
 - **Part 1:**
 - Sections 1-3: Employment Network and Ticketholder Contact Information
 - **Part 2:**
 - Section 1: Documentation of a one-on-one individualized discussion between the EN and the Ticketholder
 - Section 2: Ticketholder's Recent Work History
 - Section 3: Ticketholder's Employment Goals
 - Section 4: EN Services and Supports
 - **Part 3:**
 - IWP Terms and Conditions
 - Statement of Understanding
 - EN and Ticketholder Signatures

ENs may develop their own version of an IWP, but it must include all required information.

Documentation of One-on-One Individualized Discussion with the Ticketholder

Reference: IWP 1370 Form, Part Two, Documentation of EN-Ticketholder Discussion, Section 1: Discussion Arrangement

Documentation should include:

- Discussion date
- Modality (e.g., face-to-face, telephone, etc.)
- Location
- Duration
- Name and position of the EN interviewer
- Discussion Summary (include 3-5 sentences confirming the Ticketholder's career goals are attainable and how the EN's services and supports will help the Ticketholder achieve these goals)



How to Include the Discussion Summary on the IWP

Use [IWP Form SSA-1370](#)

- If there are no other Terms and Conditions identified for the Ticketholder, you can add the Discussion Summary under Part Three, number 15, of the same form.

Create the Discussion Summary as a separate document:

- This document should include
 - EN Name
 - EN Provider Identification number (PID)
 - Ticketholder Name,
 - Social Security Number
 - Discussion Summary
- Signatures are not required.
- The Discussion Summary document must be maintained with all other Ticketholder records and be available upon request by SSA or the Ticket Program Manager.

Note: ENs that do not currently use Form SSA-1370 can update their IWP template to include a Discussion Summary section or use a separate document as mentioned above.

Ticketholder's Employment Goals

Specific

- Individualized, well defined and easily understood by the Ticketholder

Measurable

- Can the Ticketholder measure their success toward meeting the goals?

Attainable

- Both short- and long-term goals are attainable by the Ticketholder and show a clear progression between the two.

Realistic

- Consider Ticketholder's experience, training, and/or education
- Will Ticketholder earnings reach TWL and then SGA levels?

Timely

- Expectation of when a goal would be reached

Short- and Long-Term Goal Example

Short-Term Goal:

- Laura will obtain her real estate license within the next 6-8 months. While studying for her real estate exam, she will work as a part-time administrative assistant at Harris Real Estate agency, earning \$1,050 base or more.

Long-Term Goal:

- Laura will maintain her role as a real estate agent earning \$1,470 or more monthly. Laura will work at obtaining her real estate broker's license within the year and opening her own firm within 1 1/2-2 years.

S Specific (state what the Ticketholder will do. Use action words)

M Measurable (provide a way to evaluate. Use metrics or data)

A Attainable (possible to accomplish)

R Relevant (reasonable, aligns with Ticket Program goals)

T Time-bound (clear deadline, monitor progress)

Scenario: Goal Writing Process

- Carletta wants to assign her Ticket to your Employment Network.
- She wants to be a full-time registered respiratory therapist, which has a good job market outlook.
- She worked as a certified nurse's assistant (CNA) at a physician's office before she had to resign due to cancer treatment.
- Carletta has been in remission for a year and is ready to start working towards a career that can better support her family.
- Carletta is willing to work part time while attending school to become a registered respiratory therapist and pass certification.
- Note: a respiratory therapist salary is above SGA level.

S Specific (state what the Ticketholder will do. Use action words)

M Measurable (provide a way to evaluate. Use metrics or data)

A Attainable (possible to accomplish)

R Relevant (reasonable, aligns with Ticket Program goals)

T Time-bound (clear deadline, monitor progress)

Scenario: Goal Development

Short-term Goal (3-18 months):

- Carletta will obtain a part time position in the nursing field within the next 3 months. She will start the registered respiratory therapist program at South Texas College and complete the program within the next 18 months.

Long-term Goal:

- To obtain a job as a full-time certified registered respiratory therapist in a community clinic or hospital within 2 years.

S Specific (state what the Ticketholder will do. Use action words)

M Measurable (provide a way to evaluate. Use metrics or data)

A Attainable (possible to accomplish)

R Relevant (reasonable, aligns with Ticket Program goals)

T Time-bound (clear deadline, monitor progress)

EN Supports and Services

The IWP should contain all the supports and services the EN will provide to the Ticketholder to help them reach their goals. At minimum, the IWP should include these three services:

**Career
planning**

**Job placement
assistance**

**Ongoing
employment
support**

Reference: IWP 1370 Form, Part One, Section 4: EN Supports and Services

Career Planning Services

Benefit Counseling

- Certified Benefit Counselor or Referral to WIPA (using the Beneficiary Help Line)

Goal Setting

- Assistance with creating and maintaining goals

Job Coaching

- Resume writing, interviewing skills, proper interview attire

Job Development

- Effective communication, problem solving, customer service

Training

- Certifications, General Educational Development (GED)

Job Placement Assistance

Job Search

- Job leads, resume submission, job application assistance

Job Accommodations

- Transportation, job aids, assistive technology

Job Placement

- EN placement in job

Ongoing Employment Support

Job Stabilization & Retention

- How to cope with changes, solving workplace issues, peer support groups, resource referrals

Benefits Counseling

- Explain Ticketholder benefits through all phases of the Ticket assignment
- How to report work earnings

Career Advancement

- Identification of additional credentials, how to obtain promotion, career move suggestions

Regular Follow-Up with Ticketholder

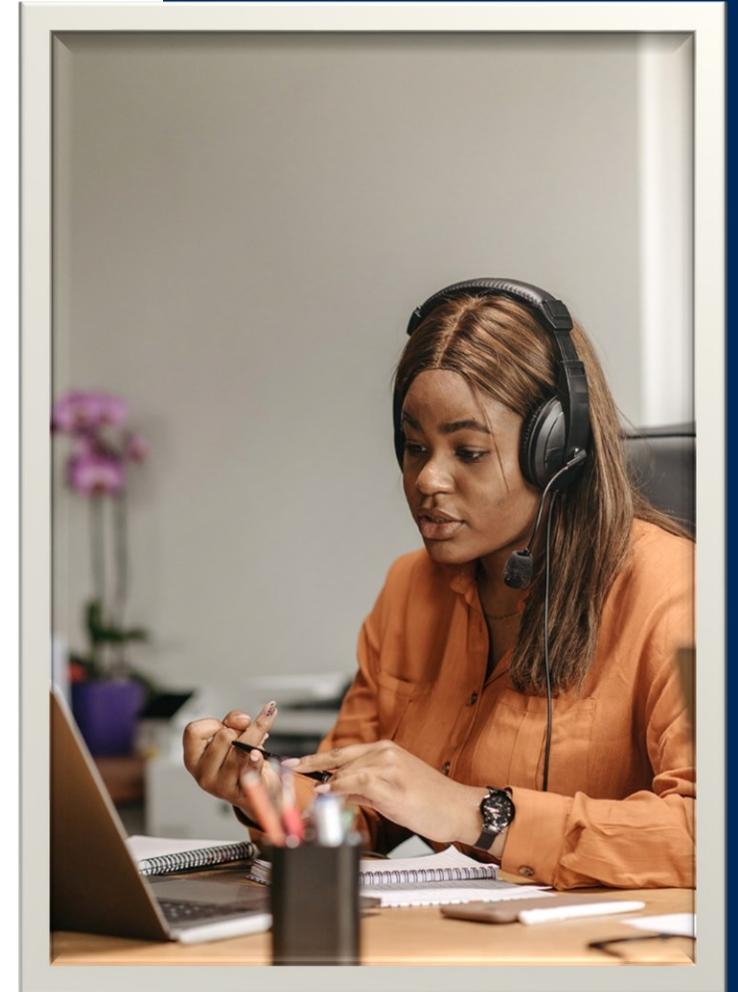
- IWP should include the frequency the EN will follow up with the Ticketholder. This sets the expectation with the Ticketholder

Initial Acquisition Phase (and through the Phase 1 Milestone Period)

At a minimum, ENs must follow up with the Ticketholder monthly

Ongoing Support Phase (Phase 2 Milestone Period through Ticket Unassignment)

At a minimum, ENs must follow up with the Ticketholder quarterly



IWP Signatures and Dates

- Both EN and Ticketholder must sign and date the IWP.
- EN signature must be legible and signed by staff member with active Suitability Clearance.
- Electronic and wet (hand-written) signatures are acceptable.
- The most recent signature date determines the assignment date.
- Signature dates must be on or after the date of the initial discussion.



Questions

Resources

1

[EN Guide for Working with Ticketholders](#)

2

[IWP Form SSA-1370](#)

3

[The Work Site - Request for Application \(RFA\) \(ssa.gov\)](#)

Reminders

Do you have feedback, recommendations and/or ideas for future EN Essentials Training Sessions?

- Contact the EN Development and Training Department
- Email ENOperations@yourtickettowork.ssa.gov

Upcoming event:

- September 20: Putting the Ticketholder's Individual Work Plan into Action (Part 2 of 2)