TICKET to Work

EN Essentials

Transcript: Preparing Successful Individual Work Plans (IWP) Part 1
August 23, 2023

Derek Shields: Welcome to today's EN Essentials training. This session is entitled Preparing Successful Individual Work Plans, Part One. My name is Derek Shields and I'll serve as the moderator for today's training session.

Before we begin with our agenda and presentation, I'd like to review a few logistics and housekeeping items. First and importantly, this meeting is being recorded and a transcription is also being captured.

Now to the next slide, please. Our agenda today for Preparing Successful Individual Work Plans is on the screen. For this EN Essentials training I will first discuss the logistics and then I'll introduce our training team. And then next, I'll provide an overview of the EN Guide that we've recently shared with everyone and provide an update on the EN Essentials training events as part of the series. And the main session today, Preparing Successful Individual Work Plans, is with Mary Kay, our presenter, and we'll follow that by a questions and answers session.

Next slide, please. Now for the logistics. During the call, questions can be asked in a number of ways. We encourage you to use the Teams chat, use the raise hand feature, or you have the option of using the telephone. If joining via phone and you wish to ask a question, it's a two-step process using star five to raise your hand. We will unmute your telephone and then you need to use the second step of star 6 in order to speak. If you wish to ask a question aloud, you could use the raise hand through the Teams option, or if you want, we have somebody watching our EN Operations email box at enoperations@YourTicketToWork.ssa.gov. We encourage you to submit questions there if you prefer. We will provide these instructions again when we get to the open Q&A.

Importantly, we do have closed captioning being offered today. There is a link that was posted in the chat. You can use that to paste the link in your browser and open a separate window to view closed captions, or if you prefer, you can use the automated captions in the MS Teams option under the more actions and scroll down to turn on live captions. So, there you have our logistics for today.

I'd now like to go to the next slide to introduce our training team. I'm joined today by Mary Kay Murphy. Mary Kay is a Program Integrity Senior Quality Manager, part of our Ticket Program Manager team, and she's going to be joined mostly through chat by Lakesha Hunt and Tiffany Beamon, both from our Program Integrity team. Lakesha is the Program Manager and Tiffany is the Senior Quality Analyst. We appreciate having all three members from our Program Integrity team joining this EN Essentials training today.

Next slide, please. As I mentioned, we recently published the EN Guide for Working with Ticketholders. This is a new resource that helps in supporting Ticketholders through their journey to financial self-sufficiency. The new EN Guide provides specific tips and details on conducting a thorough Intake discussion, creating and updating a detailed Individual Work Plan, assigning and unassigning Tickets, and preparing for IWP and Services and Supports Reviews. We have a link that's available in the slide deck and it's also been posted in the chat where you can find the EN Guide for Working with Ticketholders through that link. If you go to the service provider website at Your Ticket to Work, you can also find that through the banner on the home page. We encourage you to check it out if you haven't through one of those options.

Next slide, please. The EN Essentials training started out as a three-part series. This training is the second of the three in the series, all aligned with the new EN Guide. These virtual events feature information from the guide with tips and details to support your EN's performance and compliance from conducting a thorough Intake discussion to creating a detailed IWP. Now, of course, today is the second part, but we also have an upcoming event on September 20. This is part two of two, and we're titling this session, Putting the Ticketholder's Individual Work Plan into Action. We encourage you to put that on your schedule and join us right here again next month. That session will cover Ticket assignment and additional compliance metrics for IWP completion, including the Discussion Summary and signatures that are required, and it stresses the importance of ongoing communication and required documentation of services and supports the EN provides.

So please mark your calendar, and we have had discussions between TPM and SSA for extending the EN Essentials training into October and beyond, so please be on the lookout for updates on future topics as well. And if you want to follow, and it's also put in chat, how to access all of the EN Essentials learning events information, including our archived information from July, which is there as of now, and the recording and materials from this session will be posted there. So, use that website URL for accessing all information regarding the EN Essentials training series.

Okay, next slide, please. Getting to today's topic, an overview of the content that Mary Kay will be covering. She's going to start out by looking at what is an Individual Work Plan, followed by components of the IWP, discussion arrangements, individualized employment goals, services and supports the EN will provide, and complete it with Section 6 on required signatures. It is now my pleasure to introduce our trainer for today, Mary Kay Murphy, Program Integrity Senior Quality Manager with the Ticket Program Manager. Mary Kay, over to you.

Mary Kay Murphy: Thanks, Derek. Good afternoon, everyone. This is Mary Kay. So, our first topic was What is an IWP? We want to think about the IWP, or I like to think about it as a roadmap to financial self-sufficiency for you and the Ticketholder How am I going to get from where I am today as a Ticketholder to where I want to go in my journey to become self-sufficient? So, it should be written and signed.

It's a written and signed agreement between the Ticketholder and the EN. It should be developed in partnership with the EN and the Ticketholder. It outlines the Ticketholder's employment as well as their educational goals. The details should support the services the EN is going to provide, and basically, what the services are that you're going to provide to assist this Ticketholder in meeting their goals.

Then there's the Ticketholder and the EN's rights and responsibilities. In using the 1370 Form, those are what we would call the terms and conditions. This is a living, breathing document. It would always be subject to change, and it is also a prerequisite to a Ticket assignment. You also want to remember that all individuals, each Ticketholder is an individual. The IWP should be specific and individualized to that Ticketholder. We will not recognize IWPs consisting of pre-printed or standardized goals. Services and supports that are just applicable to all Ticketholders aren't permitted, and in addition, SSA will not recognize any online documents completed by the beneficiary prior to one-on-one discussions as an IWP.

Next slide, please. We talk about the requirements of an IWP. What are those components? We're focusing this on the 1370 Form. The IWP 1370 Form is broken out into the various sections. Part one, Sections One through Three, talk about the Employment Network and the Ticketholder contact information. Part Two, this is kind of the meat of your IWP – the Discussion Summary, Ticketholders' recent work histories, employment goals, EN services and supports.

Then we move to Part Three, which is that is the IWP, the Terms and Conditions, the Statement of Understanding, the EN Ticketholder, and signatures. Make sure there's signatures and dates as well. If you do not want, you should say an EN isn't required to use the 1370 Form, you may develop your own version of an Individual Work Plan, but you want to make sure that it includes all of the required information.

Next slide, please. The first component was the documentation of a one-on-one individual discussion with the Ticketholder. You'll notice on each slide ─ you'll see a reference to where you can find that section in the IWP 1370 Form. The documentation should include the discussion date, the modality, was it face-to-face, was it telephone? Maybe it's now a video call. The location, if face-to-face, where did this face-to-face location occur? The duration, the name and position of the interviewer, as well as the Discussion Summary, and that's three to five sentences confirming the Ticketholder's career goals are attainable and how the EN services and supports will help the Ticketholder to achieve these goals.

We want to move to the next slide. There has been a lot of discussion about how to include the Discussion Summary on the IWP. If you are using the 1370 Form, there is no space under that discussion arrangement section. However, we've identified that you can use the terms and conditions. It would be Part Three, Number 15. If there's no other terms and conditions, you can use that space to enter your Discussion Summary. You can also create this Discussion Summary as a separate document, and this you just want to make sure to include the EN’s name, the provider identification or PID number, the Ticketholder's name, their Social Security number, and then that Discussion Summary.

You are not required to have either you or the Ticketholder sign that attachment, but you do want to make sure that the Discussion Summary document is maintained with all the other Ticketholder records and is available upon request. Basically, if Program Integrity requests your IWP for Services and Supports Review or for any other reason, you want to make sure that you have that document attached with that Discussion Summary. Again, if you don't use the 1370 Form, you can update your IWP template to include a Discussion Summary section, or you can use and follow the same documentation if you wanted a separate document as well.

Can we go to the next slide, please? Now we're going to start talking about Ticketholders' employment goals. We are referencing SMART goals ─ specific, measurable, attainable, realistic, timely. So we want to think about specific. It's individualized. It's well-defined and easily understood by the Ticketholder. Measurable, can the Ticketholder measure their success towards meeting this goal? Attainable, both the short and the long-term goals are attainable by the Ticketholder, and they show a clear progression between the two. How am I going to go or how is the

Ticketholder going to get from their short-term goal and move into their long-term goal? Is it realistic? You want to think about the Ticketholder's experience, their training, their education. Will the Ticketholder's earnings reach that Trial Work Level and then the SGA levels? And then timely, what is the expectation of when a goal would be reached? Again, this falls into Section Three of your 1370 Form.

We can go on to the next. We wanted to take a good look at some short and long-term goals. So again, we want to think about the SMART goals. So, is it specific? Is it measurable? Is it attainable? Relevant? Is it timely or time-bound? In this example, in the short-term goal, Laura will obtain her real estate license within the next six to eight 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. So, if I just take a look at this short-term goal, she wants to get an education. So, she's going to get her real estate license. And we know she's planning on getting her real estate license within the next six to eight months.

While she is studying for this, she also wants to work part time. She's going to work as an administrative assistant in a real estate agency, again, giving her more experience and knowledge. And then we have an idea of what she is planning to make. So, we want to make sure that she is at a Trial Work Level or above. This short-term goal meets all of the criteria of a SMART goal. And then the 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 one-and-a-half to two years.

So, we see there's time. We've got timeliness. How long is it going to take her to reach these goals? It appears to be attainable because she's already going to get her real estate license. We see the transition between what she's doing in her short-term goal and how she's going to take what she's got from her short-term goal and move it right into her long-term goal. So again, both of these are good examples of SMART goals.

Can we move on to slide 15? So now I wanted to take goal writing and walk you through a scenario. This would be what a Ticketholder learned, or I should say what the EN learned about the Ticketholder during their Intake process. And I do want to say, not every EN completes a separate Intake and then do the IWP. Some ENs may do the Intake process as part of the IWP creation. Either one is fine. You just want to make sure that you're learning about your Ticketholder in the same manner.

So, we have a couple bullet points here. Carlotta wants to assign her Ticket to her Employment Network. She wants to be a full-time registered respiratory therapist, which has a good job market. She has worked as a certified nurse assistant in a physician's office before she had to resign due to cancer treatment. She's been in remission for over a year, and she wants to start working toward a career that can support her and her family. She's willing to work part-time while she's attending school to become a registered respiratory therapist and passes her certification.

And note, we know that a respiratory therapist salary is going to get her above the SGA level. So, looking at this goal or looking at what we've learned about this Ticketholder, she has the necessary skills to be able to move and complete her goals successfully and follow the guide of the Ticket Program, which is maintaining and getting to a point of self-sufficiency in the end. So, if we take a look, we'll go to slide 16, and we'll take a look at the goals.

In the short-term goal, so again, we created these goals based off of the bullet points from the last slide. Carlotta will obtain a part-time position in the nursing field within the next three months. So I'm going to kind of stop us right there. We know that it's parttime, we know that it's in the nursing field, and she's got a goal of making sure she gets this part-time job within three months. She will start the registered respiratory therapist program at South Texas College, and she plans on completing that within the next 18 months. So there actually are kind of two goals here, which is perfectly fine. One is more very, very short-term, and then the next is a little bit more long-term or lengthy process. So again, both very good goals. One is education, one is career oriented.

Now, someone may say, well, what happens if she doesn't get a job within the next three months? The IWP is a living, breathing document. This is where you can always amend the document. Maybe she got a job someplace else. Maybe she couldn't get a job within three months, and maybe she wasn't able to get started on that program. Living, breathing document, amend the document, add an amendment to the IWP on what those new goals would be. Carlotta's long-term goal is to obtain a job as a full-time certified registered respiratory therapist in a community clinic or hospital within two years.

So again, we have a very nice, smooth transition from the short-term to the long-term goal. It's timely. It's very specific. If I was a Ticketholder looking back on my IWP and wanting to make sure that I'm meeting my goals and I have a full understanding of the path and how I'm going to get to self-sufficiency by looking at this roadmap, it's very clear how I'm going to go from where I am today to where I'm going to be in this case within the next two years.

If we could go to slide 17. Before I step into this slide, I do want to say that on the 1370 Form, after the goals, short- and long-term goals, there's informational fields where you can add information about the Ticketholder's current or past history, experience, anything that will help us understand, help the Ticketholder understand, help you understand that this goal is attainable and reasonable for this particular Ticketholder. There's also a section for you to add what services do you think you'll be providing for this Ticketholder?

And then we move into the EN services and supports. The IWP is going to contain all the supports and services that you as the EN will provide to the Ticketholder to help them reach their goals. At a minimum, the IWP should include these three services: career planning, job assistance, and ongoing support.

Now, a couple things ─ again, focusing back on the 1370 Form. The 1370 Form is designed with checkboxes. Let's say that you feel that a Ticketholder should have ─you're going to provide job search experience or assistance. You check that box, and then you should provide the specific services that you're going to give to -- and I'm going to use Carlotta as my example. So, a sentence might look like, we will assist Carlotta with resume writing, improving her interview skills, providing job leads, et cetera. Those would be the specific services under job search that you would provide to Carlotta.

If we can move to slide 18, we'll break these down a little bit. So, under the career planning services, benefits counseling ─ we know benefits counseling is very important. It does need to be provided by a certified Benefits Counselor or a referral to WIPA using the beneficiary helpline. So, if you are indicating benefits counseling on this Ticketholder's IWP, you want to make sure that if you are a certified Benefits Counselor, you can indicate that you will be providing the services. However, if you don't have a certified Benefits Counselor on staff, then you want to make sure that your IWP clearly states that you will be referring them to the beneficiary helpline for the WIPA referral.

Goal setting is about what are you going to do to assist the Ticketholder with creating, which you've done with the IWP, but how are you going to assist them to maintain those goals? Job coaching. I just mentioned those. We have resume writing, interviewing skills, proper interview attire, job development. Maybe they need effective communication, problem solving, customer service skills. Are there any trainings that this Ticketholder is going to need? So again, you want to be very specific and define the services that you're going to provide to this Ticketholder.

If we can move on to 19, thank you. So here we have under the job placement, job search. So it's job leads. We're going to help them maybe submit resumes. We're going to give them help with completing job applications, maybe follow up to an employer for an interview that the Ticketholder had. Maybe there's a list of workshops or labor market information that can be provided to the Ticketholder. Maybe there's local job availabilities or future employment trends. All kinds of things can fall under job search, but you want to just make sure in the IWP that you define these very specifically.

Job accommodations. Some Ticketholders may require accommodations, some may not, but things that would fall under that job accommodation is: do they need transportation? Are there aids that they need to do their job? Is there assistive tech knowledge that a particular Ticketholder is going to need? Again, you may not know until that Ticketholder obtains the job what type of job accommodations are necessary. Very simple. You can always add an amendment to that IWP.

Job placement. Some ENs have the ability to place Ticketholders in specific jobs. They may have a working relationship with a company that they use and can place Ticketholders. Okay, and if we can look at 20. So, in the ongoing employment support, we have job stabilization and retention. So, it's how to cope with changes, solving workplace issues, peer support groups, resource referrals. So, when we think about job retention and job stabilization, it's how do we keep this Ticketholder working? That is part of the ongoing employment support.

Benefit counseling. That can be a service and support that an EN needs to provide all through your relationship with the Ticketholder. When they're at the end, they have a position, they have a job, benefits counseling may be necessary because it's going through how do I report my work earnings. And again, it might be helping that Ticketholder understand not to be afraid of the next steps and make sure they fully understand their benefits.

Career advancement. This in a lot of cases is how a Ticketholder is going to go from their short-term to their long-term goals. How is a Ticketholder going to become a manager in a customer service environment, for example? Do they need some sort of additional credentials to advance in their career? How will they obtain a promotion? Maybe they've changed their mind and they want to go in a whole different path. Maybe there's some other career move suggestions that you as the EN with the knowledge that you have one of your Ticketholder and just employment in general. So again, this is all part of the ongoing employment support.

So I want to talk a little bit now about regular follow-up with the Ticketholder. I do want to preface this section by saying that this is what you're going to indicate on the IWP. So in the IWP, it really should include the frequency that you as the EN will follow up with the Ticketholder. This sets the expectation with the Ticketholder. They know that you're going to contact them. Again, we know the minimum is monthly during the initial job acquisition phase and then quarterly during the ongoing support phase. So this is setting your Ticketholder up.

At the very beginning of your relationship with the Ticketholder, they know exactly what to expect from you. And I think, you know, at this point, it would be good to start the Ticketholder, getting them off on the right foot with the understanding that this will be two-way communication. You don't necessarily have to write that on the IWP. And we will talk about the two-way communication in the next chapter of our session on September 20. So just a little tease there. But this is what you're going to put on the IWP. And it's great. The IWP should set an expectation of what you are looking for from your Ticketholder as well. I sometimes have had a Ticketholder or ENs who say, but I'm trying to reach somebody, but they never call me back. It's where you want to start when you have the discussions and you're talking with a Ticketholder. This is where you want to set the expectation and say, I'm going to use Carlotta.

Carlotta, for this relationship to work and for us to help you be the success that we know you're going to be, we need to have communication and we need to build on that communication. And so we start with monthly during the initial job acquisition phase and then quarterly during the ongoing support phase. And you want to make sure that this is documented on the IWP. Our last piece is the end of the IWP. IWP signatures and dates. We have recently been seeing a lot of IWPs that there's not valid signatures or dates, and it's extremely important. Your relationship cannot begin with this Ticketholder until you have a fully executed IWP.

A fully executed IWP means both you and the Ticketholder have signed and dated the IWP. So that's bullet number one. Both of you must sign and date it. From an EN's perspective, the individual who is assigning the IWP as well as the interviewer, so the individual who is interviewing the Ticketholder ─sometimes it's the same person, sometimes not. But that person or people, the two people, need to be cleared. They need to have suitability clearance. If not, that's a PII violation. So, you want to make sure that whoever is signing the IWP and interviewing that Ticketholder have suitability clearance as well. Electronic signatures are acceptable. Wet signatures as well. That's just your handwritten signature. The most recent signature date, that is what is going to determine the assignment date. And the other last bullet point is that the signature dates must be on or after the date of the initial discussion. And that concludes my portion, Derek. We go to the next slide just to make sure.

Derek Shields: Fantastic. Thanks so much, Mary Kay, for going through your content in the presentation. And we've had a lot of activity in the chat. And I appreciate Natalie and Lakesha being able to respond to some of the questions that have come in. We've designed this session in order for you to have a Q&A period with Mary Kay and the team. What we wanted to make sure was to answer some of these specific questions in more detail. So, if we could start out, I'd ask Lakesha, I know you've been tracking in the chat some of the questions that maybe haven't been responded to for Mary Kay. As a reminder, you can submit your questions in a few different ways. First off, you can use the raise hand feature in Teams. And by doing that, we can call on you. Obviously, you can use chat. You can send an email in to enoperations@YourTicketToWork.ssa.gov. So we have some options there.

If you are calling by phone, it's a two-step process, star 5. And that would allow us to unmute you on our side. And then star 6 is unmuting your own telephone to ask your question. So those are the instructions. And again, Ana's posted in here. We do ask you to limit your question to a single item so other people could ask their questions. And if you ask, please identify yourself by name, EN name, and then your question. So those are the instructions. With all that said, Lakesha, over to you for a couple questions for Mary Kay that have come in, please.

Lakesha Hunt: Good afternoon again. I think most of the questions were answered, but there are a few that are popping in now. So, the first question is, I use the Intake tool and oftentimes this is at an earlier date than the Ticket assessment. Is that acceptable?

Mary Kay Murphy: Let me first clarify. When you say assessment, if we're meaning the date that the IWP is signed as the assessment, the date that the Ticket is assigned ─ or I'm sorry, the date that the IWP is signed is going to be the Ticket assignment date. In other words, let's say that the Intake was done on January 1, but it wasn't signed by both parties until January 5. That January 5 would be the Ticket assignment date. And I will just add also, if the date EN signs on say January 3 and the Ticketholder does not sign and date till January 10, the assignment date would be January 10. The most recent or most current date is the assignment date. And you cannot begin working with your Ticketholder until it is assigned to your EN group.

Lakesha Hunt: Thank you, Mary Kay. And the next question, what do you consider to be an electronic signature?

Mary Kay Murphy: You would want to make sure that that electronic signature imprints a stamped date to it for it to be considered valid. You want to make sure it has a time and date stamp.

Lakesha Hunt: Thank you. Does a customized IWP form need to be approved by SSA before use? If this is going to be used, this IWP form is used in place of your 1370 Form. You do not have to have it approved. We have EN Program Integrity review forms that ENs have asked us to do just to make sure that it hits all of the required components. But it isn't mandatory that you do that.

Lakesha Hunt: Okay. Can someone other than a TTW provider, provide job placement assistance?

Mary Kay Murphy: I'm going to say that's a very good question. And I'd like to take that back and get you a good answer on that one.

Lakesha Hunt: There's several questions, I think, popping up now about amendments. And I know this is going to be included in Part 2. But one is on amending the IWP, would you have to create a new document to get updated signatures?

Mary Kay Murphy: An amendment to the IWP has to be ─ basically, it's an agreement between you and the Ticketholder to change or add, remove services to the original IWP. That amendment, that document, that sheet of paper, whatever you want to use, has to be signed and dated by both you and the Ticketholder, the same as an IWP would be. It does not change your assignment date. That original IWP is the assignment date. But we would be able to see, and SSA would be able to clearly see the date that the amendment was added to the IWP, just as you would if it was a Discussion Summary, separate document. You just want to make sure to include that amendment. But you have to remember, it's another agreement between you and the Ticketholder.

Lakesha Hunt: And I think we've answered this question, but it's come up again. So, if a client has been enrolled prior to this new summary rollout, do ENs need to go back and recreate the initial summary, or are our case notes acceptable in lieu of the new requirement?

Mary Kay Murphy: Yeah, we did answer this question yesterday in the All EN Call. The case notes, if all the requirements of a Discussion Summary ─ so all the requirements that were included in that GovDelivery message, and in the training that I provided today, if all of that is included and is clearly identified in that section, or that date is truly this Discussion Summary, then it's acceptable in the case notes.

Derek Shields: Thanks, Lakesha and Mary Kay. This is Derek. I'm just going to jump in for a moment here and remind folks, if you'd like to ask a question live, you can use the raise hand feature. In case you have raised your hand and we aren't able to see it, please put that in chat and we can call on you that way as well. Katherine, it looks like we do have someone with a raised hand. Could you help with that?

Katherine Jett: Hi, yes, we have Dominic. Dominic, you're unmuted. If you'd like to click the icon above and unmute yourself and ask your question.

Dominic: Hi, I'm with D L Kusky Services. So, the short-term and long-term goals section, all of the examples you gave, which, by the way, the document's been very helpful, these videos are helpful, but all the examples given seem pretty intuitive to me. They're very detailed, like somebody has an education goal, they have specific progression in their job goals, but that's not always the case. And sometimes you run into people that really don't have much of a progression to their career. They go, oh, I want to get a manufacturing job, making $15 an hour, and that's kind of all they want to do. How would you go about writing these goals where you're still giving the appropriate detail, but not forcing people into goals that they don't have for themselves?

Mary Kay Murphy: Yeah, good question. Thank you, Dominic. So I think, again, thinking about the short and the long-term goals, when you have someone who just doesn't have a ─ maybe they're not very career-minded, which it kind of sounds like maybe this individual is, one, you've got to make sure that their ultimate goal also is the same goal as the Ticket to Work Program, which is becoming self-sufficient.

So a couple of things I would say, okay, so he wants a manufacturing job. Is he going to start -- has he not worked for a while? Is he confident that he can work full time? Does he want to only work a few hours a week and test this out? Is there something else maybe that he enjoys doing? So you know, in talking with the Ticketholder as part of the Intake, it's really learning about that Ticketholder. Maybe there's a fear that he has that you can kind of address and help with. Maybe he's afraid to take it further because he's going to lose his benefits, things like that. So it's learning about that Ticketholder, but I would also say that your goals should be, if that's truly all that he wants, then I would say your goals should indicate, is he working part time, full time? If he's going to be working part time, how many hours a week is he going to work? How is he going to progress in reaching the SGA amount, et cetera?

Derek Shields: Thanks, Mary Kay. Katherine, I think we have some other raised hands.

Katherine Jett: Hi. Yes, Derek, we have Armina. Armina, you are unmuted. Unmute yourself and ask your question.

Armina: Hi. If this question was answered already, I'm sorry, it's just the chat is going so fast, it's hard to keep up and listen to the presentation at the same time. So on number 15, where you are suggesting that we could press yes and put the summary there, then we're saying that there are additional terms and conditions, but there aren't. We just want to use that space to put the initial conversation there. And we were nervous about doing that because we don't want any auditors to be looking for additional terms when we're saying yes, and we're signing that there is, yes, additional terms, but there really isn't. So how do we deal with that? I was wondering, do we state clearly there are no additional terms and conditions? This space is being used for the summary?

Mary Kay Murphy: Yes, thank you. Good question. So, because there is not another place on the current IWP form, we have identified, our auditors and analysts, that's where they're going to look for the Discussion Summary. So, if you've checked off yes, and that's where you put your Discussion Summary, we are not expecting there to be any other terms and conditions entered there as well. If you have, if you happen to have someone who you need to put the Discussion Summary there, and you happen to have other terms and conditions, I would put the other terms and conditions first, and then drop down a line and say Discussion Summary and put your comments there.

Derek Shields: Thank you, Mary Kay. And that is a question we've had in chat, but it's also a question that we know comes in frequently. So, it's good to have it vocalized too. Katherine, back to you for our next raised hand, please.

Katherine Jett: Absolutely. We have Kim. You are unmuted. Unmute and ask your question, please.

Derek Shields: So this is Derek. I think we need to have Kim unmute yourself. If you're calling in via telephone, that's star 6. There you go, Kim.

Kim: Okay. I got it. Thank you. Yes, I'm Kim from CareerSource. I put in the chat that during our Services and Support Review results, I think on all the cases that were reported said that the Discussion Summary, discussion date and/or modality was not included on the IWP. And then, somebody commented that it was in section one of the summary. But I look back at my cases, and I do have that completely filled out. So I don't know what they could be talking about in my audit.

Mary Kay Murphy: Okay. What I would suggest is to send an email to Program Integrity. So that would be ProgramIntegrity@YourTicketToWork.ssa.gov. and we can take a look at your review.

Kim: All right. Thank you.

Mary Kay Murphy: You're welcome.

Katherine Jett: All right. Thank you, Mary Kay. We have Amanda. You have access to your microphone. Please unmute and ask your question.

Amanda: Hi. Can you hear me?

Katherine Jett: Yes, Amanda.

Amanda: Hi. I'm Amanda from Disabled Workers. And I had a question or maybe asking for more clarification regarding your example goals for Carlotta, I believe was her name. For her short-term goal, you had written down that she wanted to obtain a part-time position in the nursing field within the next three months and then additional. Now, previously in past Services and Supports Reviews, we've been found non-compliant because we didn't include a specific job title that they wanted to achieve. We would put, would like to get a job in the customer service field, but we were told we had to write out that they wanted to become a customer service representative. I'm just curious if that has changed at all or if maybe more clarification, I guess.

Mary Kay Murphy: So, you do want to have some type of job, some type of field. If you put on the IWP in the customer service field, I would think that would be acceptable, but I'd really need to look at the entire IWP to make sure. So that, again, would be a question for Program Integrity, but I would also say you want to have some sort of job title. There's also ─ I looked at it in IWP recently that had three different jobs, like one was real estate, one was surgical assistant, and one was, say, customer service. So, the short-term goal was that they were going to get a job in one of these three fields.

So this is like ─ I thought this Ticketholder, they really got some big aspirations, but how do you measure that goal? How do you drill down, you know? So maybe in that case, if you have a Ticketholder who really wants all these three things and they don't really know which way they want to go, my suggestion there would be, okay, the first goal for this individual is let's narrow it down.

So maybe the first three or four months, maybe the first six months, he or she is going to research all three of those job types and, again, with your help, you guys would, as the EN, be supporting. So that first step would be, okay, he wants to do all these things, let's work to narrow it down, and then once he narrows it down, then how are you going to move into the next steps from there?

Amanda: Okay, thank you.

Katherine Jett: Thank you, Mary Kay. We have Nicole, our next individual with a hand raised. Nicole, you are unmuted if you would like to unmute yourself and ask your question.

Nicole: So I have a question in regard to the Discussion Summary. If you're using Form 1370 and you check yes and you put it there, is it acceptable because in Form 1370, under Section 4, when you identify the services that you're going to provide, it says for you to tell how those services contribute to the goals. Is it acceptable to say see Section 4 in which the goals are identified because it's not a ton of space?

Mary Kay Murphy: I want to say in that -- so, you're meaning where you check off your jobs?

Nicole: Yeah, on Section 4, and it says short-term initial job acquisition career planning for the Form 1370, which is what our EN uses. You know, when we click, say we're going to do benefits counseling, we say we're going to provide X, Y, Z, and it relates to this goal. How? Because that's the way we understood it. To me, that seems like you hit that part of the Discussion Summary. Soc, if in the Discussion Summary section, if we're using that, can we just say see, you know, Section 4 where it identifies the services and how they relate to the goals? Or do you want us to put it in both places?

Mary Kay Murphy: The Discussion Summary should really only be a couple sentences. You know, like all the different services and supports you're going to provide and how those are going to help the Ticketholder reach those goals, I don't think you can put all that in the Discussion Summary, and you really shouldn't. It should just be a little more generalized. So you do want to give more detail in that Section 4 of the services and supports piece. Did that answer your question?

Nicole: Thanks.

Derek Shields: Thanks so much for the question, Nicole, and for the response. Let's circle back to Lakesha. Lakesha, I know that chat has still been active, and there's been some responses. Any other questions you want to bring in that you've seen in chat?

Lakesha Hunt: Good afternoon again. I'm looking through now, and I think everyone has been getting them answered. There is one recent one. Is it possible to get an example of what the Discussion Summary should look like? It seems like very specific information is required, but then it's only supposed to be three to five sentences.

Mary Kay Murphy: Yes, I believe that we provided that in the last training, but we certainly can share that again.

Lakesha Hunt: Okay, and this question has been answered, but I think we've seen it several times. Just one more for you, Mary Kay. And if the Ticketholder was assigned prior to the Discussion Summary requirements, are we required to go back and document?

Mary Kay Murphy: So the very first email that went -- I'm sorry, not email, the GovDelivery message that went out was, I believe, May of 2022, and that's where we first identified that, you know, we were going to be looking for the Discussion Summary, as well as the various places that you can add the Discussion Summary, either to the 1370 Form or as that separate document. So that's the point that we are looking for. So, any IWPs after that time period, there really should be a Discussion Summary so you may want to go back and make any updates. Again, if you remember, the Discussion Summary can be two to three sentences, a separate attachment to your IWP. It does not need to be signed by you or the Ticketholder. It just needs to be part of the IWP.

Derek Shields: Thanks, Mary Kay, and thank you, Lakesha. Yeah, if you want to access that July EN Essentials training with some of this information and this recording, you can go to the service provider website and to the EN Essentials page. We had that shared and we'll be providing it again for you, as well. Let's go back. There are a few hands raised. Thank you for your patience. Katherine, back to you, please.

Katherine Jett: Hi, Derek. Yes, we have Carmen. Carmen, your mic is active. Please unmute and ask your question.

Carmen: Hi. Yes, there was a couple of things that came up inside of the chat there, and I just wanted to confirm something. When we went through our review and they were discussing the Discussion Summary with us, we specifically asked them whether we could add the Discussion Summary text box to the IWP, and they said yes. So we did. Under number five on page two, right where the discussion arrangement is, we added a small text box right there underneath the name and position of the EN interviewer so that it's all kept right there together. So the date, the modality, the location, all of that's right there together. But one of the people that was on the chat said no, that we're not supposed to edit the form, and yet we were told specifically during our review that we could.

Mary Kay Murphy: Yeah. Again, let me take that one back, and I'll confirm. Lakesha, if you can keep track of that one, we'll follow up just to be sure, make sure we give you the right information.

Carmen: Okay, because I've done a couple of IWPs with it in that place right now, so I just want to make sure.

Mary Kay Murphy: Sure, understand.

Carmen: Okay, thank you.

Katherine Jett: Thank you. Thank you, Mary Kay. We have Mary. Mary, you're unmuted. If you want to unmute yourself and ask your question, please.

Mary: Thank you. Can you hear me?

Katherine Jett: Yes, ma'am.

Mary: Hi, everyone. Thank you so much for this training. I just have a quick question. Well, a statement, actually. Is it possible for you to give me an example of a short-term goal for a beneficiary that has a job and just wants benefits training? Wants to go into a –let's just say they have a part-time position, needs benefits counseling, you know, long-term goal, looking for a full-time position. But what would that short-term goal look like if they're just interested in benefits counseling? When they already have a job, they already have earnings, what would we put there?

Mary Kay Murphy: Okay, so again, I'm going to kind of go back to an answer I gave earlier about does the goals of this Ticketholder align with the Ticket to Work Program goals of becoming self-sufficient? If they're just wanting benefits counseling, quite honestly, I would need more information, but that would be the first question that I would ask as the EN is, is this Ticketholder's goal also to become self-sufficient?

Mary: Thank you.

Derek Shields: Thank you, Mary Kay. And let's see if we can get time for one more question, Katherine.

Katherine Jett: Hi, Derek. We have Dominic. Dominic, you're unmuted. Go ahead and ask your question, please.

Dominic: Yeah, thanks. So, I want to follow up on that question and one earlier, just get some clarification. So, with these goals here, first, when we're doing an Intake prior to filling out the IWP, our primary goal is, does this person align with the goal of the program? So, let's just assume that everybody we're doing does want to get off their benefits. The reality that we found is there are a lot of people that don't have these complicated goals. There's not a lot of progression, or in that case, they're already working, and they still do want to get off their benefits.

You also mentioned an example earlier of somebody writing down three different job goals in the short term. And to me, that makes a lot of sense if somebody that we're talking to doesn't know what they want to do, but they just know they want to get back to work. It's not easy to narrow down always on a phone call. So we need to put something down. And I guess I want to try again, if we can get an example of somebody in that situation who they do want to get off their benefits, but maybe they're already working, or maybe they're financially stable, they don't need a job that's paying $25 an hour. What would we write down?

Mary Kay Murphy: It's very difficult to just write a goal without having more information. Like when we're reviewing the services and doing a Services and Supports Review, we're looking at the IWP also in totality. And the Discussion Summary helps. So, just by saying what do I write for this particular instance, it's very difficult to say, oh, I would just say X, Y, and Z. One, I don't want you to just take that away as this is all I need to do. What I'm going to suggest is that you send a little more detail on a particular individual that you might be thinking about or referring to. No PII information, but send that to Program Integrity, and let me take a look at it and give you a little bit of a better response that way, more of a response.

Derek Shields: Thank you very much, Mary Kay. And we appreciate your time in providing us the details on the IWP and really thinking through the roadmap towards financial independence. It is 2 p.m. now, and we've come to the conclusion of today's training session.

If we can proceed to the next slide, please. We have a few resources here. We've been sharing them in chat, but we just want to reemphasize three others. We have the EN Guide for Working with Ticketholders, and we provided that link to you earlier. We suggest you check that out on our website if you haven't yet. We also, of course, have the IWP form SSA 1370, and we shared that link as well. We, of course, want to share the worksite for you. You can get the RFA there as well, and that tool is key for the elements that were just covered in today's training session.

If we could go to the next slide, please. A few reminders as we move ahead. If you have feedback or recommendations or ideas for future EN Essentials training sessions, we'd certainly appreciate those. You can contact EN Development and Training through the email address enoperations@YourTicketToWork.ssa.gov. As a follow-up to today's session, we'll be doing part two on September 20 at 1 p.m. Eastern time entitled Putting the Ticketholder's Individual Work Plan into Action. So it will be the follow-up to today's session.

We also have had a lot of questions, and there was one question, would you share the answers? We're going to archive this event in our EN Essentials page, and you'll be able to all access that content through the EN Essentials archive itself. And with that, I believe this is our last slide. If you have feedback on the event, I'd like to welcome your feedback to, again, enoperations@YourTicketToWork.ssa.gov. On behalf of the Ticket Program Manager and our colleagues at Social Security, we thank you for all the work you're doing and the services and supports you provide to Ticketholders across the country. And this ends this EN Essentials training session. Thank you.