

# **From Intake to IWP: Building Relationships One Individual at a Time**

---

November 13, 2024

**Thank you for joining today's webinar!**  
**We will begin at 1 p.m. ET**  
You will not hear audio or see captions until we begin.

# **From Intake to IWP: Building Relationships One Individual at a Time**

---

November 13, 2024

# AGENDA

## **Intake to IWP: Building Relationships One Individual at a Time**

Logistics and Introductions

New EN Intake Guidance and Worksheet

CareerSource Central Florida (CSCF) Intake Process

CSCF Panel

Q&A

# Logistics

- TPM is recording and capturing the transcript from today's meeting and will make it available on the Your Ticket to Work website at [EN Essentials Learning Events](#).
- Please feel free to ask a question in the MS Teams chat section.
- You may send additional questions or comments to: [ENOperations@yourtickettowork.ssa.gov](mailto: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"; scroll down the list to "Language and Speech" then 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.
- Per the Ticket Program Agreement (Part III, Section 11 subsection I), EN staff are not permitted to record this meeting nor capture the transcript.

# Introductions

## MODERATOR

### Derek Shields

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

## PRESENTER

### Ana Morales

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



# EN Panelists

## Angela Smoak-Hunter

*Program Manager*

CareerSource Central Florida

## Janee Olds

*Director of Workforce Special Projects*

CareerSource Central Florida



---

# Intake Guidance and Worksheet

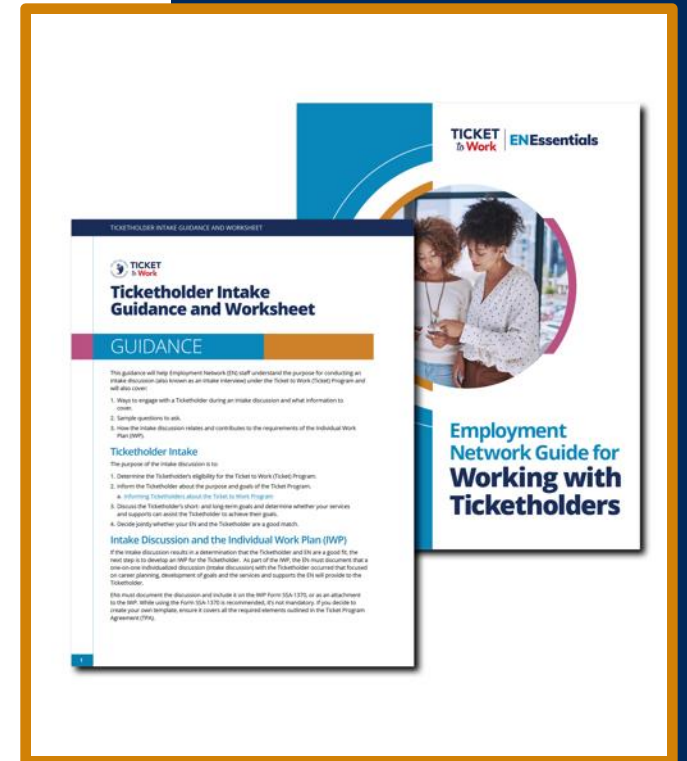
---



# New Resource

The **Intake Guidance and Worksheet** is a companion resource to the [Employment Network Guide to Working with Ticketholders](#).

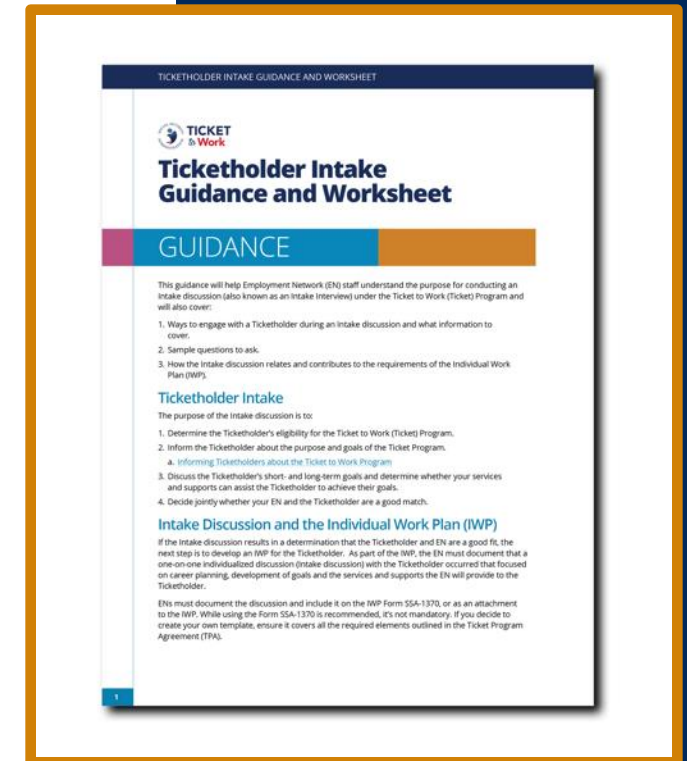
- Offers in-depth information for conducting and documenting a Ticketholder intake discussion, also known as:
  - One-on-one individualized discussion
- Provides instructions on how to meet Individual Work Plan (IWP) requirements.
- Provides a fillable intake form/worksheet.





# Intake Guidance

- The purpose of the intake discussion is to:
  - Determine the Ticketholder's eligibility for the Ticket to Work (Ticket) Program.
  - Inform the Ticketholder about the purpose and goals of the Ticket Program.
  - Discuss the Ticketholder's short- and long-term goals and determine whether your services and supports can assist them to achieve their goals.
  - Jointly decide whether your EN and the Ticketholder are a good match.
- The guidance discusses ways to engage with a Ticketholder during an intake discussion and what information to cover.



# Intake Guidance, cont.

The guidance defines how the intake discussion relates to the IWP Discussion Summary requirement:

- As part of the IWP, the EN must document that a one-on-one individualized discussion with the Ticketholder occurred. At a minimum, the documentation for Discussion Summaries should include:
  - Date of the discussion
  - Modality of the discussion (in-person, voice call, video call)
  - Discussion Summary:
    - ✓ Your assessment that the Ticketholder’s short-term and long-term goals are reasonable and attainable
    - ✓ How your EN’s services and supports will assist the Ticketholder with achieving their goals
- Include the Discussion Summary on the IWP Form SSA-1370, on your own EN IWP template, or as an attachment to the IWP.
  - If using Form SSA-1370, add the discussion date and modality in Part Two, Documentation of the EN-Ticketholder Discussion, Section 1, under “Discussion Arrangement”. If no other terms and conditions are identified, you can add the discussion summary under Part Three, number 15, of the same form. If you’re using your EN’s own IWP template, you should update it to include a discussion summary section.

# Intake Worksheet

- Fillable Form that ENs can download, complete and print
- Contains sample questions and space to capture:
  - Date, Ticketholder contact information and additional notes
  - Answers to key questions and factors to identify, such as:
    - ✓ Employment goals, dreams, and earnings potential
    - ✓ Readiness to reduce and, if possible, eliminate dependence on Social Security disability benefits
    - ✓ Skills, education, and training needs
    - ✓ Work history, strengths, and interests
    - ✓ Workplace preferences
    - ✓ Barriers and fears to address/overcome
    - ✓ Fit with Ticketholder needs and EN service offerings

The image shows a screenshot of a digital form titled "TICKETHOLDER INTAKE GUIDANCE AND WORKSHEET". The form has a header with "WORKSHEET" in a blue and orange bar. Below the header, there is a section titled "Intake Discussion" with several input fields: "Date of Discussion:", "Modality of Discussion (in person, voice call, video call):", "Interviewer Full Name:", "Ticketholder Full Name:", "Mailing Address:", "Email:", "Phone Number:", and "Age/Date of Birth:". There is also a larger text area for "Additional Notes:". Below the input fields, there is a section titled "TREAT THE INTAKE AS A CONVERSATION" with a list of bullet points: "Ask the Ticketholder about themselves and develop a rapport before moving on to asking specific questions.", "Engage in a natural conversation that discovers a Ticketholder's interests and experiences and identifies the supports and services they need to achieve goals and dreams.", "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.", and "Understand the Ticketholder's needs and determine whether your organization is a good fit for the Ticketholder."

---

# CSCF Intake Process

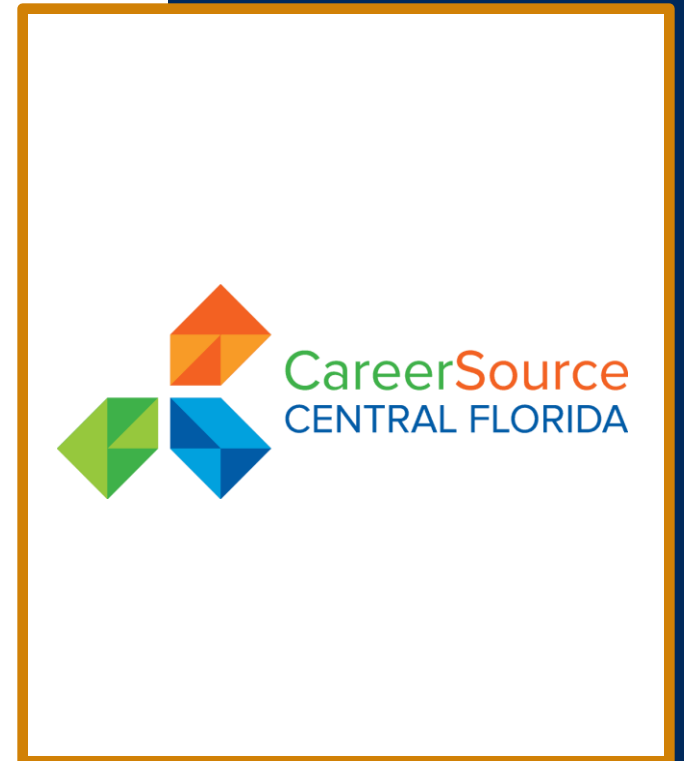
---



# CareerSource Central Florida (CSCF)

**Mission:** Connect Central Floridians to careers and develop skilled talent for businesses

- CSCF curates local talent for high demand industries, meeting local business needs and cultivating growth and prosperity for the Central Florida community.
- As an approved Workforce EN, CSCF equips Ticket to Work participants with the resources to take charge of their vocation, find a career that meets their individual needs, and contribute their talents to the Central Florida community.



# Leads

Leads come from two avenues:

- Individuals inquire using the interest form on the CSCF website landing page.
- Internal staff make referrals:
  - Workforce agency staff interact with customers across all services of the agency, then identify persons eligible for the Ticket to Work program and refer the potential lead.

Initial engagement:

- Verify interest and eligibility first.
  - Invite to the Ticket to Work Orientation.

# Orientation

- Held every Tuesday at 11:30 a.m.
  - All EN staff attend
- Offered both in person and virtually at all five locations across the CareerSource five-county region.
- Staff are pictured and introduced so that participants become familiar with the team.
- If virtual, camera use is encouraged for optimal interaction.
- During the meeting, staff send an email to all participants with a link to a Ticket to Work interest form and they verify that customers received it.



# Intake Appointment

Prior to the appointment the CSCF staff:

- Review the Ticket Portal to verify Ticket availability.
- Review [Employ Florida](#) website to see if the customer has registered.
  - Employ Florida is a secure portal and data management system for job seekers and employers.

During the appointment:

- Determine if the customer is the right fit.
  - If so, both parties mutually agree to begin the career journey together.





# IWP Consultation

Together the CSCF staff and Ticketholder:

- Collaborate to create the IWP following the intake appointment.
  - Can occur same day OR during a separate appointment.
- Create short-term and long-term goals the using S.M.A.R.T. method.
  - Objectives clearly define steps to achieve each goal.
- Easy to read so that everyone can understand what has been agreed upon.
- Review Ticket to Work Program expectations to ensure clear understanding.
- Complete and review the IWP agreement/contract.
- Schedule the IWP Signing Day appointment.



# IWP Signing Day

In-person special event!

- Celebrates the customer for joining the Ticket to Work Program
  - Picture taking:
    - When a signed media release form is received
- Congratulations message is sent after the event:
- Welcome to the family!



---

# CSCF Panel

---



---

# Q&A

---



# Questions

- 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](mailto:ENOperations@yourtickettowork.ssa.gov).



# Thank You

## Angela Smoak-Hunter

*Program Manager*

CareerSource Central Florida (CSCF)

## Janee Olds

*Director of Workforce Special Projects*

CareerSource Central Florida (CSCF)



# UPCOMING EVENTS

**November 19: All EN Call**

**November 20: WISE Webinar**  
Ticket to Work for America's Veterans

**December 18: WISE Webinar**  
Debunking the Biggest Myths About Ticket to Work

[2024 Calendar of Events](#)

Send an email to the EN Development and Training Department at [ENOperations@yourtickettowork.ssa.gov](mailto:ENOperations@yourtickettowork.ssa.gov) with feedback, recommendations or ideas for future EN Essentials events.