TICKET *to* **Work** | **EN Essentials**

Ask Program Integrity – Creating Quality Individual Work Plans

May 21, 2025

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.

TICKET *to* **Work** | **EN**Essentials

Ask Program Integrity – Creating Quality Individual Work Plans

May 21, 2025

AGENDA

Ask Program Integrity – Creating Quality Individual Work Plans (IWP)

Logistics and Introductions

Overview

Ask Program Integrity Panel Discussion

IWP Related Resources

Q & A Session

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.

- 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 and PANELISTS

Ticket to Work Program Manager (TPM) staff:

Derek Shields
Senior EN Development and Training Manager

Zoe Kwitek
*EN Integrity Specialist*

Synethia Ellerbee
EN Integrity Specialist

Overview

During this session we will:

- Interview TPM Program Integrity staff to discuss and provide tips about the development of IWPs and documentation, focusing on the most common areas for improvement.

- Share multiple IWP and Services and Supports-related training resources, describe them, and show ENs where to find them.

- Provide ample opportunity for ENs to ask questions related to all the above.
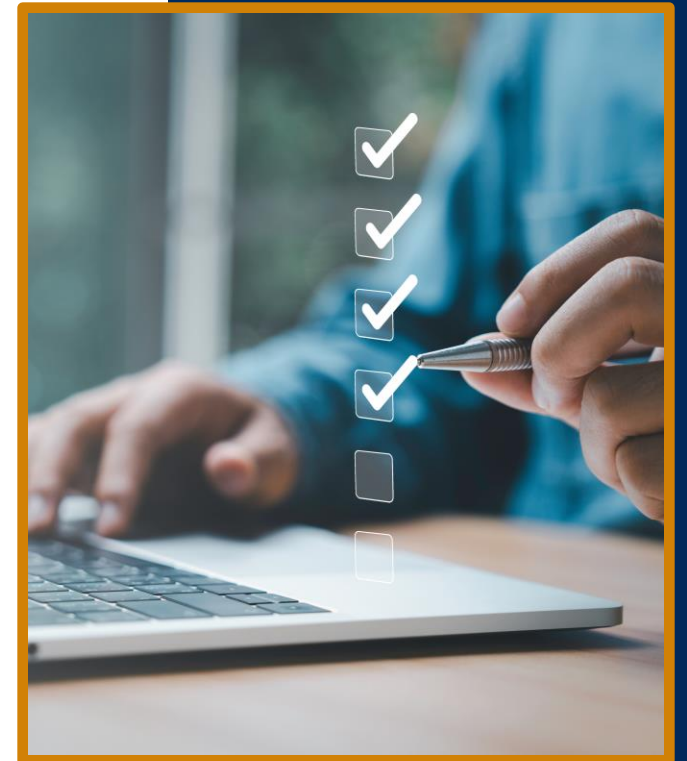
Ask Program Integrity Panel

S.M.A.R.T. Goals

- **Specific:** State what the Ticketholder will do using action words. (Individualized, well-defined, and easily understood by the Ticketholder.)

- **Measurable:** Ability to evaluate using metrics or data. (Ticketholder can measure their success toward meeting the goals.)

- **Achievable:** Possible to accomplish. (Both short- and long-term goals are reachable by the Ticketholder and show a clear progression between the two.)

- **Realistic:** Will Ticketholder earnings reach Trial Work Level (TWL) and then Substantial Gainful Employment (SGA)? (Based on the Ticketholder's experience, training, and/or education.)

- **Timely:** Clear deadline that can be monitored for progress. (Establish an expectation for when a goal would be reached.)

Meet Aliyah

- Aliyah seeks to work in the human resources sector.

- Before receiving SSDI, Aliyah worked as an administrative assistant.

- Aliyah is ready to start back to work now that she has a seizure-alert dog and a new medication that has stabilized her condition.

- She plans to start part-time as a remote administrative assistant while pursuing college.

- Her long-term goal is to obtain certification and work full time in HR.
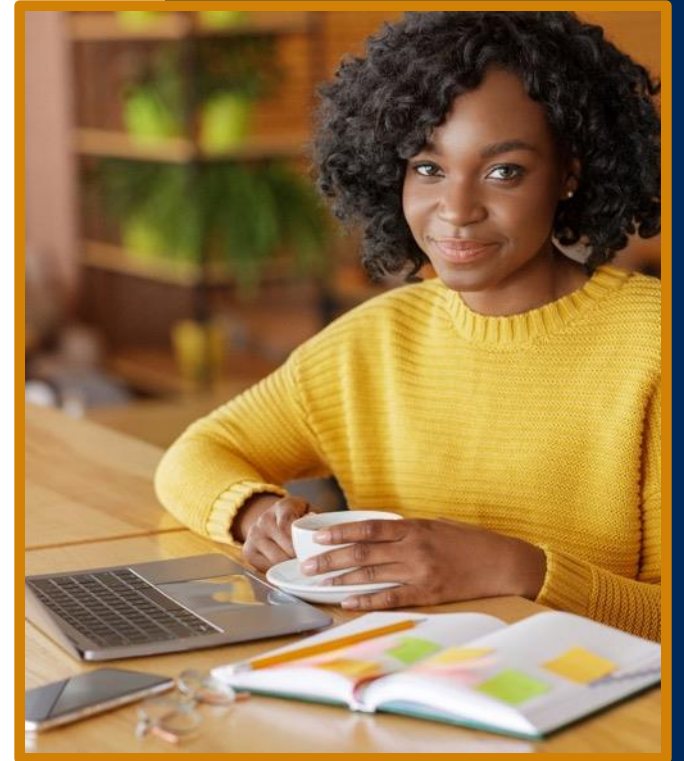
Example Short-term Goal

Aliyah will register for her first semester at Granite Rock University in the Human Resources (HR) Bachelor's Program within the next month.

During her initial two years at Granite Rock University, she plans to study 15-20 hours per week.

Simultaneously, Aliyah will work part-time (15 hours per week) as an administrative assistant, earning a base salary of $1,200 or more monthly.

Example Long-term Goal

Aliyah plans to complete her 4-year college degree in HR within 6 years.

In her third year at Granite Rock University, Aliyah will increase her part-time hours as an administrative assistant to 20-25 hours per week to earn $1,800 or more monthly.

To balance her studies and work commitments, she'll dedicate 15-20 hours per week to her coursework.

After graduating, Aliyah will secure full-time employment (40 hours per week) in the HR sector, earning a salary of $4,000 or more monthly.

During her first year of working full-time, Aliyah will study 10 hours per week to obtain her Society for Human Resource Management Certified Professional (SHRM-CP) credential, to secure a mid-level or above role in HR, earning $5,000 or more monthly.

- Example IWP Resources - Preparing the Individual Work Plan (IWP)

Example Long-term Goal: Specific

Aliyah plans to ==complete her 4-year college degree in HR== within 6 years.

In her third year at Granite Rock University, Aliyah will ==increase her part-time hours as an administrative assistant== to 20-25 hours per week to earn $1,800 or more monthly.

To balance her studies and work commitments, she'll dedicate 15-20 hours per week to her coursework.

After graduating, Aliyah will ==secure full-time employment (40 hours per week) in the HR== sector, earning a salary of $4,000 or more monthly.

During her first year of working full-time, Aliyah will study 10 hours per week to ==obtain her Society for Human Resource Management Certified Professional (SHRM-CP) credential, to secure a mid-level or above role in HR==, earning $5,000 or more monthly.

Example Long-term Goal: Measurable

Aliyah plans to complete her 4-year college degree in HR within 6 years.

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Example Long-term Goal: Achievable #1

Aliyah plans to complete her 4-year college degree in HR within 6 years.

In her third year at Granite Rock University, Aliyah will increase her part-time hours as an administrative assistant to 20-25 hours per week to earn $1,800 or more monthly.

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Example Long-term Goal: Achievable #2

Aliyah plans to ==complete her 4-year college degree in HR within 6 years==.

In her third year at Granite Rock University, Aliyah will increase her part-time hours as an administrative assistant to 20-25 hours per week to earn $1,800 or more monthly.

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After graduating, Aliyah will ==secure full-time employment (40 hours per week) in the HR sector==, earning a salary of $4,000 or more monthly.

During her first year of working full-time, Aliyah will study 10 hours per week to obtain her Society for Human Resource Management Certified Professional (SHRM-CP) credential, to ==secure a mid-level or above role in HR==, earning $5,000 or more monthly.

Example Long-term Goal: Realistic

Aliyah plans to complete her 4-year college degree in HR within 6 years.

In her third year at Granite Rock University, Aliyah will increase her part-time hours as an administrative assistant to 20-25 hours per week to earn $1,800 or more monthly.

To balance her studies and work commitments, she'll dedicate 15-20 hours per week to her coursework.

After graduating, Aliyah will secure full-time employment (40 hours per week) in the HR sector, earning a salary of $4,000 or more monthly.

During her first year of working full-time, Aliyah will study 10 hours per week to obtain her Society for Human Resource Management Certified Professional (SHRM-CP) credential, to secure a mid-level or above role in HR, earning $5,000 or more monthly.

- Example IWP Resources - Preparing the Individual Work Plan (IWP)

Example Long-term Goal: Timely

Aliyah plans to complete her 4-year college ==degree in HR within 6 years.==

==In her third year== at Granite Rock University, Aliyah will ==increase her part-time hours== as an administrative assistant to 20-25 hours per week to earn $1,800 or more monthly.

To balance her studies and work commitments, she'll dedicate 15-20 hours per week to her coursework.

==After graduating, Aliyah will secure full-time employment== (40 hours per week) in the HR sector, earning a salary of $4,000 or more monthly.

==During her first year of working full-time==, Aliyah will study 10 hours per week to ==obtain her== Society for Human Resource Management Certified Professional ==(SHRM-CP) credential==, to secure a mid-level or above role in HR, earning $5,000 or more monthly.

Services and Supports Request

- For each Ticketholder, the ENs must respond with the following documentation:
  - IWPs and all amendments
  - Case notes for the last 12 months.
    - If the Ticketholder has been with the EN for less than 12 months, all case notes for that Ticketholder are required.

What to Include Services and Supports Review Request Video Transcript.pdf

Two-way Communication

- **Two-way Communication** is defined as the Ticketholder providing a response to the EN's contact attempt.
- Two-way communication can be in the form of any of the following in which the Ticketholder provides a response:
  - In-person meetings
  - Phone conversations
  - Personalized emails
  - Personalized voicemails received by the Ticketholder
  - Text message conversations
  - Any app-based communication
  - Personalized letters

Two-way Communication, cont.

- **Initial Job Acquisition Phase:** ENs must follow up with the Ticketholder at least monthly to assess their employment needs, offer and provide employment services as needed, verify progress, and maintain records of these contacts, including the method of communication.

- **Ongoing Support Phase:** ENs must follow up with the Ticketholder at least quarterly to assess their employment support needs, offer and provide employment services as needed, and maintain records of these contacts and services, including the method of communication.

- **Two-way Attempts:** The EN shall make a minimum of three attempts in a one-month period (for Initial Job Acquisition) or three-month period (for Ongoing Support) to make two-way communication with the Ticketholder. If the EN does not have two-way communication with the Ticketholder, the EN shall unassign the Ticket within 60 days or 180 days, respectively, from the date of the initial contact attempt.

- ENs must **save evidence (case notes)** of contact attempts and communication with the Ticketholder and provide if requested.

Case Note Documentation

- Case notes for the past 12 months must:

  - Demonstrate when and how two-way communication occurred

  - Show that services and supports are being provided as outlined in the IWP

  - Highlight key issues and details of the discussion:

    - Actions taken

    - Services provided or planned to achieve the Ticketholder's goals, or revisions if not meeting their goals.

- For more information on two-way communication, refer to the ENRFA, Part III, Section 4.A.3.a - c
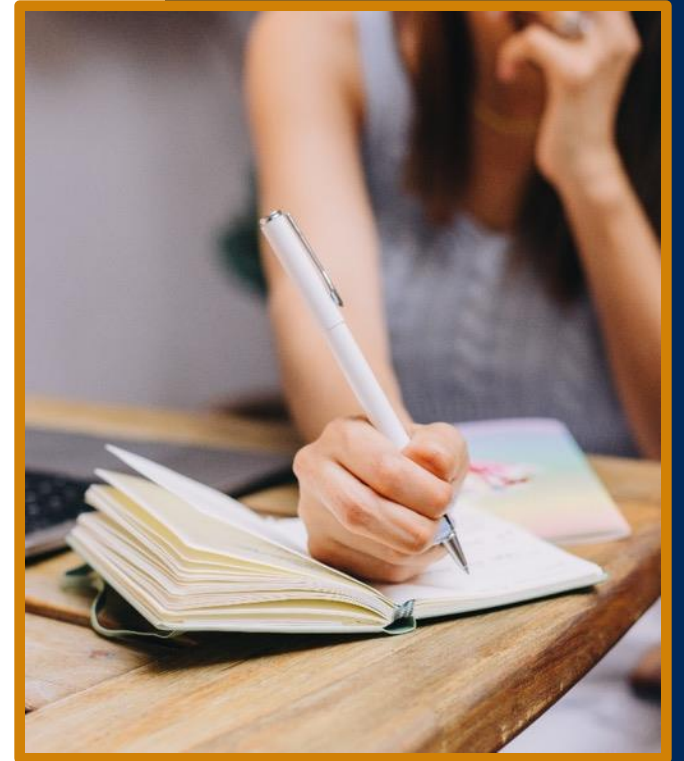
Case Note Example

EN Staff Name: Jett Rodriguez-Lopez Employment Specialist

May 12, 2025: Emailed Aliyah to schedule time to discuss the progress of her job. Aliyah responded to my email and confirmed a time the following day.

May 13, 2025: Called Aliyah:

- Aliyah reported that her employer increased her hours to 25 hours per week, with a raise to $18.00 per hour/$1,800 per month.

- I congratulated Aliyah on meeting her goal and provided benefits counseling. I advised her that the increase in pay would cause her SSDI benefit to end soon since her earnings will be above the current SGA amount of $1,620.

- I urged Aliyah to contact SSA to avoid being overpaid; provided her with resources and contact information to request her SSDI benefits be suspended on time.

- Aliyah stated she understood her increase in wages would cause her SSDI benefits to cease and would reach out to SSA within a week to avoid an overpayment.

IWP Related Resources

EN Guide for Working with Ticketholders

The EN Guide for Working with Ticketholders provides specific 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
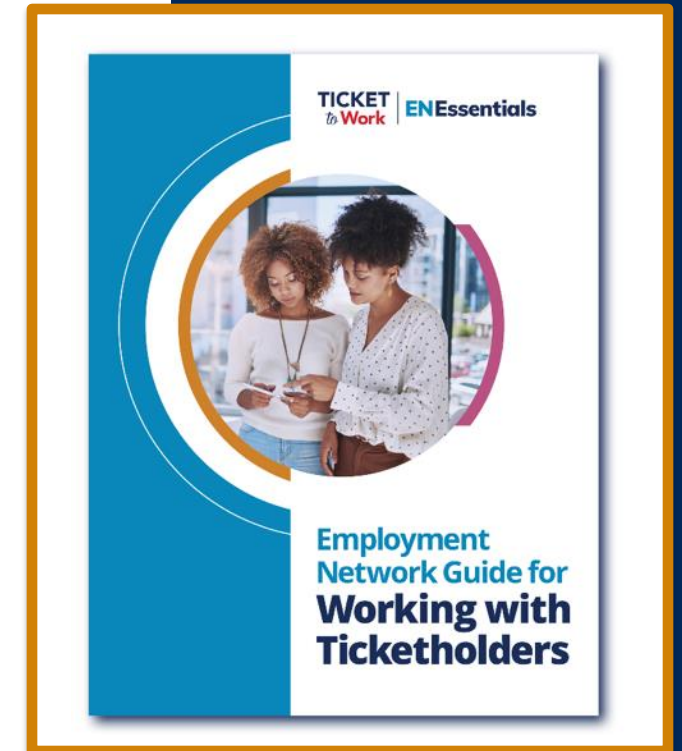
Intake Guidance and Worksheet

The Ticketholder Intake Guidance and Worksheet is a companion resource to the EN Guide to Working with Ticketholders. This worksheet includes in-depth intake information and a fillable form to assist ENs in conducting and documenting a Ticketholder intake discussion that meets IWP requirements.
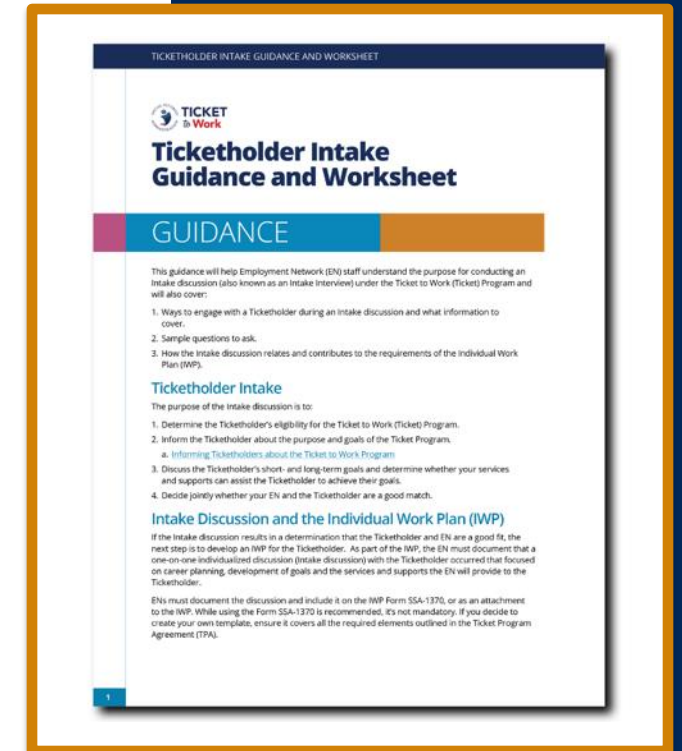
Service Provider Foundations Learning Modules

The [Service Provider Foundations Learning Modules](#) are available on [yourtickettowork.ssa.gov](#), and allow all Employment Networks (EN) staff to access the same required training for EN key points of contacts.

Learning Module 5

[The Ticketholder Intake Process](#)

Explore an overview of the Ticketholder intake process, EN responsibilities and Ticketholder needs, IWP Discussion Summary requirements, best practices for intake discussions, and Ticket Program intake resources.

MODULE 5

The Ticketholder Intake Process
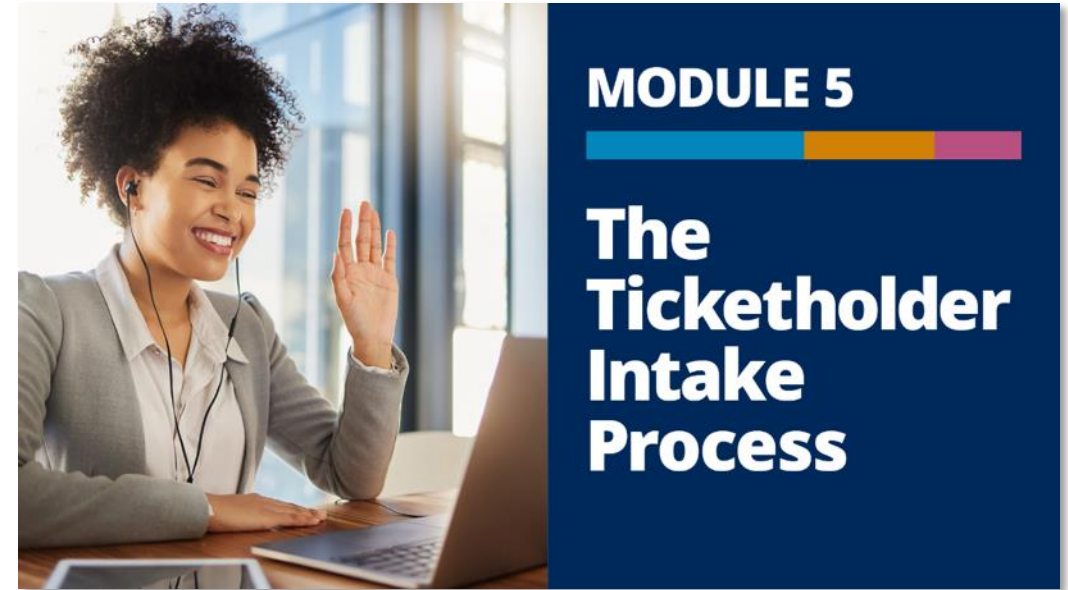
Learning Module 6

Preparing the Individual Work Plan (IWP) – Overview

Learn IWP requirements and best practices, which include using Ticket Program resources, writing Ticketholder goals and related services and supports, protocol for IWP signatures and dates, and maintaining the IWP.

MODULE 6

Preparing the Individual Work Plan (IWP)
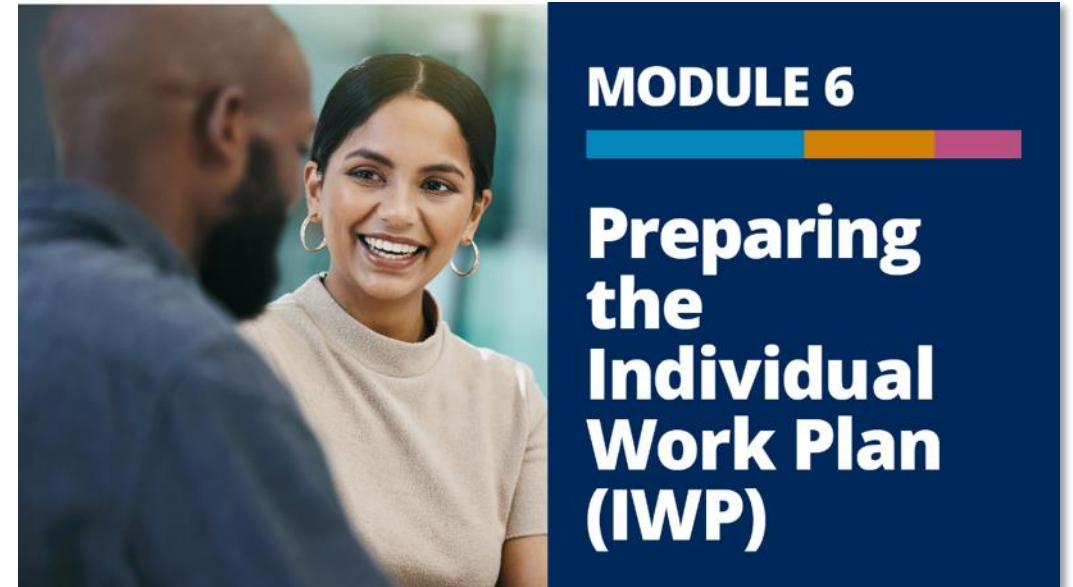
Learning Module 7

[Services and Supports Review](#)

Understand what a Services and Supports Review is, review requirements, the notice of review and request for documentation, how to respond to the request for documentation, the Outcome Summary Report, and handling non-compliant review responses.

MODULE 7

Services and Supports Review

Past EN Essentials Learning Events

Past EN Essentials Learning Events | Ticket to Work

- July 12, 2023: Optimizing Ticketholder Intake

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

- September 20, 2023: Putting the Ticketholder's Individual Work Plan (IWP) into Action – Part 2

- October 18, 2023: Managing your EN Services and Supports Review

Note: EN Essentials Events are historical and may not reflect SSA policy changes made after the date of the event. Please access the EN Request for Application (RFA) | The Work Site | SSA for all current requirements.

IWP Development

- Form 1370: Individual Work Plan

- Guidance for Completing Individual Work Plans (IWPs) with Example

- Informing Beneficiaries of the Goals of the Ticket Program

- IWP Submission Cover Sheet

Questions

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@ssa.gov.

Thank You

Zoe Kwitek
EN Integrity Specialist

Synethia Ellerbee
Integrity Specialist

UPCOMING EVENTS

May 28: WISE Webinar - Presenting Your Best Self to Employers

June 4 -18: Employment Verification

June 17: All EN Call

June 25: WISE Webinar

2025 Calendar of Events

Send an email to the EN Development and Training Department at ENOperations@ssa.gov with feedback, recommendations or ideas for future EN Essentials events.