



Employment Network Guide for Working with Ticketholders

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Employment Network Guide for Working with Ticketholders From Intake Through Ticket Unassignment

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INTRODUCTION

This guide will aid Employment Networks (EN) in developing relationships with Ticketholders and supporting them through their journey to self-sufficiency.

In this guide you will find tips and in-depth details on conducting a thorough intake discussion to create a detailed Individual Work Plan (IWP) that has clear and measurable goals. This guide also provides tips on creating your own IWP, when to send an IWP, Ticket assignment and unassignment procedures.

This guide will also help ENs prepare for IWP and Services and Supports (S&S) Reviews that the Ticket Program Manager's (TPM) Program Integrity office conducts for Social Security.

INTAKE PROCESS

TICKETHOLDER INTAKE PROCESS

The purpose of the Ticketholder intake process is to decide the Ticketholder's eligibility for the Ticket to Work (Ticket) Program and for you and the Ticketholder to jointly decide whether your EN is a good fit for them. This process helps ensure that your organization can provide the necessary services and resources for Ticketholder success.

The Ticket Program is not right for every Ticketholder, such as those who want to work part time indefinitely. But, if the Ticketholder is committed to trying to become employed and financially self-sufficient, the EN can work closely with the Ticketholder to provide the services and supports to help them do so.

Purpose

1. Determine the Ticketholder's eligibility for the Ticket Program.
2. Inform the Ticketholder about the purpose and goals of the Ticket Program.
[Informing Ticketholders about the Ticket to Work Program](#)
3. Discuss the Ticketholder's short and long-term employment goals and determine whether your services and supports can assist the Ticketholder to achieve their goals.
4. Decide jointly whether your EN and the Ticketholder are a good match.

Below are some factors to consider during the intake conversation.

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

Elements of a Great Ticketholder Intake Discussion

BUILD A RELATIONSHIP

Develop a rapport before moving on to more personal topics. Start with small talk to get the Ticketholder to be more comfortable during the first few minutes and then move into asking questions about the Ticketholder's employment and hobby interests, as well as their concerns with starting employment or joining the Ticket Program.

Below are few sample questions to begin the conversation:

- "How is your day going?"
- "Did you have trouble finding the place?"
- "What do you know about the Ticket to Work Program?"
- "What are some of your hobbies or things you like to do?"
- "Tell me about some of the previous jobs you held and what you liked about them."

LISTEN

Use active listening and let the Ticketholder do most of the talking. Active listening techniques include paraphrasing, brief verbal affirmation and practicing good eye contact.

MANAGE THE DIALOGUE

In order to manage the dialogue, use a combination of open- and close-ended questions to direct the conversation.

Below are a few tips to help navigate the discussion:

- 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 any needed reasonable accommodations to perform essential job functions.
- Use dollar figures instead of terms like "Trial Work Level (TWL)" or "Substantial Gainful Activity (SGA)."
- Avoid jargon.

TREAT THE INTERVIEW AS A CONVERSATION

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

The information gathered through this conversation will transfer into the required components of a Ticketholder's IWP, including the development of clear and measurable goals.

LOOK FOR THE BEST FIT

Understand the Ticketholder's needs and decide whether your organization is a good fit for the Ticketholder. If you decide that the Ticketholder is not a good fit for your organization, provide a warm handoff directly to another EN (or State Vocational Rehabilitation Agency if more appropriate) that would be a better fit. If another EN is not known, then refer the Ticketholder to the [Choose Work website](#) or the Beneficiary Support Help Line at **1-866-968-7842** or **1-866-833-2967 (TTY)**.

The referral process is a key step in ensuring that the Ticketholder has all the information necessary to make a connection with a new organization. When a referral is made, if you are able, follow up with the Ticketholder within a few days to confirm they connected successfully with a service provider. Encourage the Ticketholder and give them hope by letting them know that they are still a great fit for the Ticket Program.

Note: For more details regarding Ticketholder Intake requirements, please refer to TPA Part III, Section 3.

INDIVIDUAL WORK PLAN

The Individual Work Plan (IWP) is an agreement between a Ticketholder and an EN outlining the details of the Ticketholder's employment and educational goals, the EN's specific employment support services to help the Ticketholder meet their goals as well as Terms and Conditions.

Terms and Conditions show the rights and responsibilities of both parties. The IWP provides a roadmap to financial self-sufficiency and should be reassessed and amended as changes occur to the Ticketholder's employment or financial goals. The EN Representative and the Ticketholder should agree upon the details in the IWP. Both the Ticketholder and EN must sign and date the IWP. There are six required components that all IWPs must have (see TPA Part III, Section 4.A). These components are included directly below, followed by a more detailed description for each of the required elements.

Required Components of an IWP

The following components correspond specifically to [SSA Form 1370](#), the Ticket to Work Program Individual Work Plan (IWP).

- Part One: Employment Network and Ticketholder Contact Information
- Part Two:
 - 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 Supports and Services
- Part Three:
 - IWP Terms and Conditions
 - Statement of Understanding
 - EN and Ticketholder Signatures

While Social Security recommends the use of the SSA Form 1370, ENs may develop their own version of an IWP, which must include all the components listed above.

PART ONE: EMPLOYMENT NETWORK AND TICKETHOLDER CONTACT INFORMATION

An EN must fill in their contact information, including the Provider Identification Number (PID) and business model (ENs with multiple business models must specify under which model the Ticketholder will receive services). This section must also include contact information for the Ticketholder and an alternate contact. The EN must fill these sections in completely.

PART TWO: DOCUMENTATION OF EN-TICKETHOLDER DISCUSSION

Section 1: Discussion Arrangement

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. The EN must document the discussion and include it on the Individual Work Plan (IWP) Form SSA-1370, or in a separate document attached to the IWP.

At a minimum, the discussion summary should include:

- Date of the discussion
- Modality of the discussion (e.g., face-to-face, telephone, etc.)
- A synopsis that includes:
 - An explanation describing why the Ticketholder's short-term and long-term goals are reasonable and attainable.
 - How your EN's services and supports will assist the Ticketholder to achieve their goals.

There are two options for documenting the discussion summary:

- **Use [IWP Form SSA-1370](#) or your EN's own IWP template.** If you're using the SSA-1370, the discussion date and modality should be in Part Two, Documentation of the EN-Ticketholder Discussion, Section 1, under "Discussion Arrangement". If the EN has not identified any other terms and conditions, the EN can add the discussion summary under Part Three, number 15, of the same form. If the EN is using their own IWP template, they should update it to include a discussion summary section.
- **Create a separate document attached to the IWP for the discussion summary.** In addition to the discussion date, modality, and summary, this document should include EN Name, EN Provider Identification number (PID), Ticketholder Name, and Social Security number. The EN or Ticketholder do not need to provide a signature.

Whether ENs use the SSA-1370 or their own IWP form (alone or with an attached document), the EN must maintain the discussion summary with all other Ticketholder records and be available upon request by SSA or the Ticket Program Manager.

Section 2: Ticketholder's Recent Work History

The IWP should record at least the last six to 18 months of the Ticketholder's work and earnings. If the Ticketholder cannot provide paystubs, the EN should record recent earnings to the best of the Ticketholder's knowledge.

The Ticketholder's work and earning history:

- Allows the EN and Ticketholder to discuss previous earnings and work history.
- Provides an opportunity for ENs to discuss wage reporting with Ticketholders.
- Shows whether and how the Ticketholder's goal is reasonable and attainable.
- Provides information ENs can use to help determine available payments after Ticket assignment.

Section 3: Ticketholder's Employment Goals

Employment goals should include both short-term and long-term goals. The short-term goal defines the Ticketholder's employment expectations during the first 18 months of Ticket assignment, and the long-term goals provide employment expectations over the next three to five years. The IWP's short-term and long-term goals should show a clear progression of how the Ticketholder will move toward the goal of financial self-sufficiency, which aligns with the Ticket Program goal to reduce or eliminate their reliance on benefit payments. If applicable, the short-term goals must also include the specific type of skills training/ education/ certification the Ticketholder will complete to achieve their goals, the expected enrollment status of the Ticketholder (e.g., part-time or full-time), as well as the anticipated graduation or completion date.) Based on the individual needs of the Ticketholder, they may begin working part or full time. For example, one Ticketholder may need to begin working part time to get acclimated to the workplace, but another Ticketholder may be prepared to immediately obtain a full-time position.

Reminder: A Ticketholder that begins working part time should have the goal of self-sufficiency and elimination of reliance on benefit payments.

Goals should be clear and measurable. The more detailed the goals, the easier it will be for the EN and the Ticketholder to identify necessary supports and services. Examples of clear and measurable goals may include the number of hours the Ticketholder will work, full- or part-time work, type of work or position title, or how long the Ticketholder will take to reach the goal. Goals should also:

- Be consistent with the Ticket Program goal of helping the Ticketholder become self-sufficient.
- Be specific to the individual Ticketholder.
- Be realistic, given the Ticketholder's experience, training, and/or education.
- Ensure that long-term goals for monthly earnings are at or above SGA. For short-term goals, TWL is permissible but only as a tool to move towards earnings above SGA level.
- Show the progression between the short-term and long-term goals.

Developing Clear and Measurable Goals

Although the Ticket Program training module focuses on developing Specific, Measurable, Attainable, Relevant, Time bound (SMART) goals, there are other options that ENs can consider when developing and evaluating short-term and long-term goals. Ticketholder goals should show progression towards financial self-sufficiency. EN staff can consider the tools below to help build and update strong goals for Ticketholders.

To learn more about developing goals, consider visiting these sites:

- [SMART Goals - How to Make Your Goals Achievable \(mindtools.com\)](#)
- [What is the 5 Ws and H Framework? | Definition and Overview \(productplan.com\)](#)
- [What Are the 5 Ws of Writing? | Uses & Examples - Video & Lesson Transcript | Study.com](#)
- [How to Set CLEAR Goals and Achieve Them \(Best SMART Goal Alternatives\) | 2022 \(hghire.com\)](#)

Section 4: EN Supports and Services

Once the Ticketholder and the EN have established the short-term and long-term goals, the next step is to document the specific services and supports the EN will provide to assist the Ticketholder in meeting their goals. If an EN checks a service/support box on SSA Form 1370, they need to specify the service they are going to provide. For example, if you check the “Job Search” box, you should include a sentence like “[Potential EN] will assist [Ticketholder Name] with resume writing and provide job leads consistent with the Ticketholder’s goals, via various websites (e.g., [Choose Work Find a Job page](#), Indeed).” If an EN does not offer or a Ticketholder does not need a particular service/support, the EN does not need to check the service or provide any notes. There are three main categories of supports and services:

1. Career planning: benefits counseling (with a benefits counselor whose certification has been approved by SSA), goal setting, job coaching, job development, training, etc.
2. Job placement assistance: job search, job accommodation, job placement, etc.
3. Ongoing employment support (job stabilization and retention, career advancement counseling, etc.)

Career Planning

- **Benefits Counseling:** If the Ticketholder requires benefits counseling and the EN does not have a certified Benefits Counselor on staff, the EN should refer the Ticketholder to the Ticket to Work Help Line so that they can be referred to the appropriate Work Incentives Planning and Assistance (WIPA) program. The IWP must clearly state that the Ticketholder is being referred to a WIPA via the Ticket to Work Help Line for benefits counseling.
- **Goal Setting:** Include how the EN will continue to help the Ticketholder create additional achievable goals as well as the plan for assessing the goals.
- **Job Coaching:** Describe the specific job coaching assistance the EN will provide (e.g., on-site assistance, on-the-job training, job retention services) and how that assistance will help the Ticketholder achieve their goals.
- **Job Development:** Describe the specific job development assistance the EN will provide (e.g., resume writing, analyzing prospective jobs, improving interview skills) and how that assistance will help the Ticketholder achieve their goals.
- **Training:** This section should include any training the EN will provide or help provide to reach the Ticketholder's goals (e.g., certifications, General Educational Development (GED), etc. Describe how that training will help the Ticketholder achieve the goals. Describe who will perform the training, how will it be delivered (i.e., virtual or in-person), and who will pay for it.

Job Placement Assistance and Ongoing Employment Support

- **Job Search:** Describe how the EN will help the Ticketholder find a job such as providing job leads, resume submission, assisting with job applications, job referral follow-up or providing a list of related workshops. Describe how this assistance will help the Ticketholder achieve their goals.
- **Job Accommodation:** The EN should assist the Ticketholder with identifying job accommodations based on the Ticketholder's needs. Describe the specific accommodation assistance (e.g., identifying the accommodations needed, assistance requesting accommodations, counseling on requesting accommodations) the EN will provide and how the assistance will help the Ticketholder achieve their goals. Identify whether the EN/Ticketholder will request the reasonable accommodations for the workplace, training, and/or educational institution.
- **Job Placement:** Describe whether the EN will provide direct job placement or job placement assistance (e.g., assistance completing applications, job referrals) and how the assistance will help the Ticketholder achieve their goals.
- **Regular Follow-Up with Ticketholder during the Initial Job Acquisition Phase:** ENs must follow up with Ticketholders at least monthly during the initial job acquisition phase to verify and help facilitate Ticketholder progress (i.e., retain employment at or above the TWL throughout the Phase 1 Milestone period). This is defined as two-way communication and shall be any of the following acceptable mediums in which the Ticketholder provides a response: in-person meeting, a telephone conversation, personalized email messages, voicemail message received by the Ticketholder, personalized text message conversations, any form of computerized or telephone app communication (e.g., Zoom, Microsoft Teams, Google Meet, Skype, etc.), and personalized letters to and from individuals. The EN shall document the method of communication and, where possible, retain any evidence of the communication and must provide this evidence to SSA and/or TPM if requested. The EN shall make a minimum of three attempts in a one-month period to make two-way contact with the Ticketholder. In the event the EN does not have a two-way conversation with the Ticketholder, or the Ticketholder requests no contact, the EN shall unassign the Ticket within 60 days from the date of initial contact attempt.

- **Regular Follow-up with Ticketholder during the Ongoing Support Phase (i.e., starting with the Phase 2 Milestone Period through Ticket Unassignment):** At a minimum, the EN shall communicate with the Ticketholder quarterly to determine if the Ticketholder requires any ongoing employment supports and, where possible, maintain records of these communications, including the method of communication. This two-way contact shall be in the form of any of the methods of communication described above. The EN shall make a minimum of three attempts in a three-month period to make two-way contact with the Ticketholder. In the event the EN does not have a two-way communication with the Ticketholder, or the Ticketholder requests no further contact, the EN shall unassign the Ticket within 180 days from the date of initial contact attempt.
- **Job Stabilization and Retention:** Describe the services the EN is going to provide or facilitate to help the Ticketholder maintain employment and how it will help the Ticketholder achieve their goals. Some examples include assistance with coping due to changes in medical treatments, benefits advisement, connecting Ticketholders to peer support groups, and providing referrals to the local or state resources, such as:
 - American Job Centers
 - Protection and Advocacy for Beneficiaries of Social Security (PABSS)
 - Work Incentives Planning and Assistance (WIPA)
 - Work Incentive Liaison (WIL)
 - Job Accommodation Network (JAN)
- **Career Advancement Counseling:** EN provides advancement services such as identifying additional credentials relevant to employment goals, such as how to obtain a promotion or suggest other career moves that support the Ticketholder's goals.

PART THREE: IWP TERMS AND CONDITIONS

To ensure the Ticketholder understands the Terms and Conditions of their IWP, the EN should review each one individually. If an EN uses their own form, it must include all 15 Terms and Conditions listed in the Ticket Program Agreement (TPA); see TPA Part III, Section 4.A). The IWP may include additional Ticketholder Terms and Conditions, which ENs can list under #15 on the SSA Form 1370. All additional Terms and Conditions must align with the TPA requirements. **Note:** If there are no other Terms and Conditions, the EN can include the Discussion Summary here.

Statement of Understanding: Write the Statement of Understanding from the Ticketholder's point of view. This statement makes it clear that the EN will provide the support and services identified in the IWP to help the Ticketholder earn enough to become financially self-sufficient.

For more details regarding Individual Work Plan requirements, please refer to TPA Part III, Section 4.A.

- The IWP is not valid until the Ticketholder and the EN both sign and date it. The EN representative's signature should be legible and easy to read. If the signature is not legible, the EN's representative should print their name below their signature.

Employment Networks (EN) must use an approved signature method on all Individual Work Plans (IWP). The IWP is a written and signed agreement between the Ticketholder and the EN and is a prerequisite for a Ticket assignment. The Social Security Administration (SSA) requires both the Ticketholder and a suitable EN representative to use either a wet or electronic signature, described below, on the document.

- **Wet Signature** – Ticketholder and EN Representative physically sign their names to the document.
- **Electronic Signature** – An electronic signature is a broad term for any electronic process that indicates acceptance of an agreement. Software such as DocuSign and Adobe Acrobat Sign are examples that allow anyone to electronically sign documents.

Submitting IWPs

Creating quality and compliant IWPs is the first step to the Ticketholder reaching their employment goals. To ensure new and re-established ENs are developing quality IWPs, TPM's Program Integrity office will review a minimum of 10 IWPs. Program Integrity will assign the Ticket if the IWP is compliant. Program Integrity will contact the EN to discuss any non-compliant IWPs, which may result in the EN submitting a new or amended IWP. Program Integrity will not assign the Ticket until the revised IWP is compliant. Program Integrity will assign the Tickets associated with compliant IWPs on behalf of the EN. Once Program Integrity is confident the EN is creating quality and compliant IWPs, they will authorize permission and rights for the EN to assign Tickets directly via the Ticket Portal.

The EN must send the IWP no later than 14 calendar days after both the EN and the Ticketholder have signed and dated it. Program Integrity will review IWPs within seven business days from receipt date.

IWP Submission Coversheet: TPM developed the [IWP Submission Coversheet](#) to streamline the IWP submission process and ensure that appropriate Program Integrity staff receive the IWP. To avoid delays, ENs should use this coversheet to provide the necessary information and identify the reason for submitting the IWP.

ENs should submit IWPs with the IWP Submission Coversheet via Government-to-Government Services Online (GSO). If unable to submit via GSO, fax to 1-703-893-4020, ATTN: Program Integrity/Ticket Assignment.

If faxing is not feasible, ENs can mail IWPs to:

Ticket Program Manager (TPM)
ATTN: Ticket Assignment
P.O. Box 1433
Alexandria, VA 22313

Once an EN can assign Tickets via the Ticket Portal, they are required to assign the Ticket within 14 calendar days of the signature dates on the IWP. The claim month in which the first Ticket payment is eligible may be impacted if the Ticket is assigned more than 14 calendar days after the signature.

The EN cannot begin working with the Ticketholder until the EN assigns the Ticket via the Ticket Portal or Program Integrity assigns the Ticket for new ENs.

For additional information, you will find SSA Form 1370 under the "Tools for Success" section via this link: [IWP Form SSA-1370](#).

For more details regarding Submitting an Individual Work Plan, please refer to TPA Part III, Section 4.D.

Amending IWPs

The IWP should be a “living document.” Over time, the Ticketholder’s goals and the support they need may change. When this occurs, the EN and Ticketholder should discuss the changes and mutually agree to amend the IWP with new goals and/or services and supports. This must be documented, dated, and signed by both parties and added as an attachment to the original IWP. ENs must always include amendments when SSA or TPM requests an IWP. A scenario of an amendment to an IWP might be if a Ticketholder decided to change their goals and needed additional support from the EN. In this case, the EN must include both the new goals and additional support in the amendment. In another example, the EN should amend the original IWP if the Ticketholder determines a service or support is no longer necessary.

The amendment should include:

- EN name and PID
- The revised employment and financial goals
- The revised service and supports the EN will provide
- Ticketholder signature and date
- EN Representative’s printed name, signature and date

Storing IWPs

ENs should store or file IWPs in a secure location.

Retention of records requirements are as follows (see TPA Part III, Section 11.K.):

1. During the life of the TPA, the EN may destroy any records for a Ticketholder three years following unassignment of the Ticket. If not destroyed, the EN must securely maintain the records in the manner they would maintain assigned Ticketholder records.
2. The EN shall retain all Ticketholder records at the time of the expiration or termination of its TPA for a period not to exceed one year following the termination or expiration date, unless directed otherwise by SSA.
3. The EN is responsible for the disposal of (or arranging for the disposal of) Ticketholder Personally Identifiable Information (PII) in a safe and secure manner, including Ticketholder PII maintained by subcontractors or provider partners performing services for the EN under the TPA.
 - Destroy paper documents containing PII by burning, pulping, shredding, macerating or other means. Ensure that someone cannot recover or use the information. Hand tearing or lining through documents does not meet SSA’s guidelines for appropriate destruction of PII.
 - Destroy electronic devices and media (e.g., computers, disk drives, CDs, DVDs, flash drives, and magnetic tape) containing PII by overwriting using approved software, degaussing using approved magnetic fields or physical destruction using approved techniques.

For more details regarding Storing an Individual Work Plan, please refer to TPA Part III, Section 11.K.

TICKET UNASSIGNMENT

Either the Ticketholder or the EN can request a Ticket unassignment.

The Ticketholder can obtain the Ticket Unassignment Form from the [Choose Work website](#) or the Beneficiary Help Line, phone: 1-866-968-7842 or 1-866-833-2967 (TTY/TDD), or email: support@choosework.ssa.gov. The Ticketholder can mail or fax the unassignment request to the Ticket Program Manager. ENs can also send unassignment requests via fax or mail or through their GSO account.

- **Ticketholder Unassignment Request:** The Ticketholder must complete, date and sign the [Ticket Unassignment Form](#). An EN may place language in the IWP requesting a Ticketholder to notify the EN if they intend to unassign their Ticket. However, this is not a requirement for the Ticketholder.

ENs may unassign a Ticket any time they are unable to or no longer willing to provide services to the Ticketholder. ENs may also unassign a Ticket when they have lost contact with the Ticketholder and have exhausted all contact methods to reach the Ticketholder.

- **EN Unassignment Request:** In most cases, ENs can unassign Tickets via the Ticket Portal. However, there may be instances in which the EN must reach out to TPM for Ticket unassignment (for example, the EN doesn't have access to unassign Tickets in the Ticket Portal). The [EN Unassignment Request Template](#) outlines the information needed to process a Ticket unassignment request. SSA will also accept other formats, assuming the necessary information is included.

ENs should submit Ticket unassignment requests via Government Services Online (GSO). If unable to submit via GSO, ENs can fax the request.

The Ticketholder or the EN can fax Ticket Unassignment Forms to 703-893-4020, ATTN: Ticket Unassignment or mail to:

Ticket Program Manager (TPM)
ATTN: Ticket Unassignment
P.O. Box 1433
Alexandria, VA 22313

For more details regarding Ticket Unassignment, please refer to TPA Part III, Section 2.E.

For more details about how to request payments after Ticket Unassignment, please refer to TPA Part III- Section 5.D.2.a. & b.

SERVICES AND SUPPORTS

SERVICES AND SUPPORTS REVIEW

TPM's Program Integrity office conducts periodic Services and Supports (S&S) Reviews for Social Security to ensure ENs comply with performance expectations under the TPA. For these reviews, Program Integrity reviews a random sample of assigned Tickets to confirm that ENs provide all required services and supports for Ticketholders.

Tips for a Successful Services and Supports Review

Prepare as best as you can for a successful Services and Supports Review using these tips:

Start with a well-written and detailed IWP using the information provided above.

- Provide the Ticketholder the services and supports agreed upon in the IWP.
- Amend IWPs when needed and store the amendments with the original IWP.
- Maintain thorough records and properly file documents to ensure quick retrieval of IWPs and case notes.
- Document communications with Ticketholders, contact attempts, and services provided in the case notes when they occur. The case notes should include the services and support the EN provides during the contact.
- Review your Ticket assignments monthly during the initial phase and quarterly during the ongoing phase and unassign Tickets for the Ticketholders you are not actively working with or have lost contact with.
 - **During Initial Job Acquisition Phase through the end of Phase 1 Milestones:** In the event the EN does not have a two-way conversation with the Ticketholder, or the Ticketholder requests no contact, the EN shall unassign the Ticket within 60 days from the date of initial contact attempt.
 - **During the Ongoing Support Phase 2 Milestones through Ticket Unassignment:** In the event the EN does not have a two-way communication with the Ticketholder, or the Ticketholder requests no further contact, the EN shall unassign the Ticket within 180 days from the date of initial contact attempt.
- Review Ticketholder files regularly to determine if the IWP needs amending, the Ticketholder needs to adjust goals, and/or if you need to adjust services.
- To ensure meeting the request due date, once the EN receives the Services and Supports Review request via GSO, identify the suitable staff that will gather the required documents and, if different, who will submit the documents through GSO.
- Include all required documents for every Ticketholder prior to sending the documents. Required documents include IWP, IWP amendments (if applicable), and case notes. Include case notes for a minimum of two and a maximum of three years. ENs must include all case notes for Ticketholders assigned less than two years.
- Simplify the review process by creating a separate file or PDF for each Ticketholder containing only their IWP, case notes and, if applicable, IWP amendments.

RESOURCES

[Informing Ticketholders about the Ticket to Work Program](#)

ENs must provide this information to every beneficiary interested in participating in the Ticket Program.

[Guidance for Completing Individual Work Plans \(IWPs\) with Example \(PDF\)](#)

ENs can reference this guidance to review details for completing a Ticketholder's IWP.

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

ENs may use this fact sheet to inform the Ticketholder about the Ticket Program, how to get started, and the necessary steps to reach their employment goals.

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

This fact sheet is a resource for beneficiaries to ease their concerns and create understanding about how participation in the Ticket Program works with their disability benefits.