EN Essentials: Optimizing Ticketholder Intake Transcript
July 12, 2023

Derek Shields: Welcome to today's EN Essentials training session entitled "Optimizing Ticketholder Intake." My name is Derek Shields and I'm the Senior EN Development and Training Manager for the Ticket Program Manager, and I will be serving as today's moderator.

We are excited to start this new series, the EN Essentials training series, and today we will be focused, of course, on Intake. The session is scheduled for 60 minutes, with approximately 45 minutes of training content followed by a 15-minute Q&A session.

Now, to the next slide, please. Our agenda today is on the screen. We'll start with a welcome, logistics and housekeeping. I'll introduce the training team. I'll go through an overview of the new EN Guide for Working with Ticketholders and update you on some EN Essentials training dates that are in the near future and then we'll get into the core content with the Intake process with Brittney Boyd. After that, we'll also hear from a couple of ENs who are guests today and we'll have a Q&A session where the entire training team will be available to help answer your questions. Meanwhile, we do have an open chat, and I'll cover that during our housekeeping and logistics.

Next slide, please. As I mentioned, on this slide we cover logistics. Feel free to ask questions in the MS Teams chat section. We will be holding those until that open period, so there's no need to put it in there if you are going to wait for the open period. We'll take those questions toward the end. Now, if you do have comments that you'd like to add to the training content, we welcome that as well.

Today if you are joining by phone and you wish to ask a question, you must raise your hand using *5 on your phone, and you will be unmuted. Then you need to use *6 to speak. It's a two-step process for the phone; *5 and then *6. If joining via MS Teams and you wish to ask a question aloud, you can use the raise your hand feature and then we'll call on you and when called upon, you can unmute your mike. We do ask you to limit your questions to one per participant so we can cover as many as possible. If you have other questions or comments, we do encourage you to send an email to us at ENoperations@yourtickettowork.ssa.gov .

We are recording this event, and there is a transcript being taken. Importantly, we also are offering closed captioning. This is available for participants who are joining via the MS Teams application or by using the closed captions link that's been provided in the GovDelivery email that was sent and has been posted by Glynis in the chat. To turn on closed captioning through MS Teams, you can go to the three ellipses at the top of the MS Teams window and turn on more actions, then go down the list to select "turn on live captions." When using the link option, we ask you to paste the link in your Internet browser and it will open a separate window to view those closed captions. With that, we thank you for joining us today and we want to move on with the EN Essentials training. Next slide, please.

As I mentioned, we have an outstanding team gathered to engage with you. The presenters on the training team along with some other team members are listed on this screen. I'd now like to introduce them. Brittney Boyd is a Training and Activation Analyst on the Ticket Program Manager team. She'll be providing the Intake process content. Glynis Moore is also a Training and Activation Analyst on our team, and she'll be active, posting resources for you in the chat. We are also pleased to be joined by Mary Kay Murphy. Mary Kay is on our Program Integrity team as a Senior Quality Manager and will focus on some practices from her services and supports role. Mary Kay is joined as well by Tiffany Beamon, who will be joining us in the Q&A session. Tiffany is on the Ticket Program Manager team as a Senior Quality Analyst. We're also pleased to be joined by Tammy Liddicoat, our TPM Partner Relations Manager. And as I mentioned, we have two Employment Network guests. Nancy Gagnon, Career Center Manager from MassHire Lowell Career Center, a Workforce System entity. And we're also joined by Pamela Walker, the CEO of Alliance Professional Services, LLC. We're pleased also to have Natalie Sendledorfer with us. Natalie is a lead EN analyst in the Office of Employment Support for the Social Security Administration. She will be with us during the Q&A session as well. So that's our training team. We're so pleased to have everyone available and participating. Please, next slide.

As many of you are likely aware, SSA and TPM were pleased to recently develop and release a new resource entitled EN Guide for Working with Ticketholders. The guide is designed to assist ENs in developing relationships with Ticketholders and supporting them through their journey to financial self-sufficiency. The new guide provides specific tips and details. And these four bullets on the slide cover the critical sections of this content — Conducting a Thorough Intake Discussion with the Ticketholder, Creating and Updating a Detailed Individual Work Plan, Assigning and Unassigning Tickets, and Preparing for IWP and Services and Supports Reviews. So, I'd like to acknowledge the many ENs that helped TPM gather the ideas and content along with the leads on the project, Brittney Boyd and Glynis Moore. And our colleagues from Services and Supports who I also introduced, Mary Kay Murphy, Tiffany Beamon, all of whom contributed to the development. To find the new resource, there's a link on the slide that goes to yourtickettowork.ssa.gov, our service provider site. Glynis has posted that link to access it in the chat. It is located under the Tools for Success header, and a link to the EN guide is a way for you to explore all of the content that's available. Let's move to the next slide, please.

So, of course, this is our first session in the EN Essentials series, July 12, “Optimizing Ticketholder Intake." We've sent out some GovDelivery messages about upcoming events to cover the rest of the content that's in this EN guide. On August 23, we have "Developing and Maintaining Successful Individual Work Plans, Part 1." In this session we'll focus on how to complete an IWP using Ticketholder Intake information to create goals and identify the services and supports the Ticketholder needs. The session will also cover Ticket assignment and amending the IWP as the Ticketholder moves toward their employment goals. Then next, on September 20, from 1 to 2 p.m. ET, we'll do Part 2. Part 2 will cover Ticket assignment and additional compliance metrics for IWP completion, including a Discussion Summary and required signatures. The session will also stress the importance of ongoing communication and required documentation of the services and supports the EN provides. So we ask you to mark your calendars for August 23 and September 20 for the second and third part in the three-part EN Essentials training series. With that, let's move to the next slide, please.

When we think of the Intake process, I like to think about the importance of the requirements themselves so we can start to think with the end in mind, really connecting Intake with the IWP. Specifically, an EN must document that a one-on-one individualized discussion with the Ticketholder has occurred that focused on career planning, development of goals, and the services and the supports the EN will provide to the Ticketholder. And we have a checklist of items here that the documentation needs to include. When thinking of these, some are straightforward, right? Discussion date, the modality, whether it's face-to-face or telephone, the location and duration, the name, and the position of the EN interviewer, and recognizing that the EN interview must have suitability. And then we have the summary, just three to five sentences describing the highlights of the Intake discussion. And when thinking of the summary that documents the individual discussion, focusing on these three areas, we really need to frame how we advance toward those goals and, hopefully, toward achievement of those goals. This is when we hear from ENs wanting more guidance —more examples, more development assistance and in some cases, where do we put the summary so it's recognized? To address this and really begin our training session today, to look at some best practices and examples from this, we've asked Mary Kay Murphy to come on and provide comments and some examples. So, Mary Kay, if you can turn on your camera and join us, I'll turn it over to you, please.

Mary Kay: Hello, everybody. So, I wanted to talk a little bit about the Discussion Summary. You're going to hear a lot of information from Brittney, Nancy and Pam today about what makes a good Intake, and what you're going to do with the Discussion Summary is provide a little summary of your Intake. It's going to be fresh in your mind, so we suggest that you create that Discussion Summary immediately following your Intake with the Ticketholder. You should, by the time you have completed that Intake, be able to have a good idea of what the goals of this Ticketholder are going to be, that they are a good fit for you, and that you are able to provide the services and supports and have an idea of what services and supports the EN would need to help this Ticketholder meet their goals.

You provide support to many Ticketholders, so you want to create that Discussion Summary while it's fresh in your mind. The discussion summary is going to be your starting point when creating a quality IWP.

As Derek said, we're looking for three to five sentences that include the following key points. The first being your assessment that the Ticketholder's goals are reasonable and attainable, and then how your services and supports will assist this Ticketholder to achieve those particular goals.

So, in the next slide, I believe both of the examples are four sentences. The first one is "I met with Victor and reviewed labor market information specific to the paralegal field. Victor is eager to pursue a career as a paralegal, is currently enrolled in Texas A&M University and has 15 credits left to obtain his degree. Victor would like to secure an administrative position at the law firm while he completes his education. ABC Works will assist with Victor's pursuit of employment, his degree and any additional certification to further his career advancement and retention." So, the first part of this example lets you know what the goals are and, basically, the Ticketholder, does have an attainable goal. They're already working towards this particular goal, so it is attainable. And then the second part is, what are the services that you provide that can help and how they're going to further his career? Can we move to the next slide?

So, in this example, "During our discussion, Carla expressed her motivation and interest in becoming financially independent and shows determination toward reaching her goals. Carla is currently working part time at Walmart and her prior work history and management supports her goal of becoming a manager at Walmart. Carla needs reliable transportation to work full time. ABC Works will help Carla obtain transportation so she can maintain her position at Walmart and will locate additional managerial training so that Carla is fully prepared when a management position becomes available." So again, at the very beginning, we did talk about what the Ticketholder's goals are and they are attainable based on prior work history. And then the second part is the services that the EN will provide and how those are going to help that Ticketholder to become successful.

This is not the place — the Discussion Summary is not the place for you to describe the goals in detail, create measurable goals, etc. And it's also not the place that you need to list every service that you're going provide to the Ticketholder. This is just a summary based on your assessment that the Ticketholder’s goals are reasonable and attainable and how your services or support will assist the Ticketholder to achieve those goals. Thank you.

Derek: Mary Kay, thanks a lot. I think it's helpful to have a couple of examples with the end in mind. I do want to recognize that we have some questions and comments in chat. I've written them down so when we open the Q&A, we'll bring them back. To summarize, if there needs to be a summary, where is it in the field in the IWP and where does the Discussion Summary go? There are a couple similarly related questions. We will bring those back when we open the Q&A to ensure we recognize that those have been asked. With that, move to the next slide, please.

So, at this point let's dive into the four segments of the training. Brittney Boyd will now join us to begin the section, looking at the purpose, the key questions, the barriers, and the elements of a great intake session. So, I'm pleased now to turn the training over today to Brittney.

Brittney: Thank you, Derek. Good afternoon, everyone. I see some familiar faces and I'm happy you wanted to come back and listen to me train again on Intake. As previously stated, the purpose of today, we are talking about Ticketholder Intake. The purpose of the Intake process is, number one, for you to determine if the Ticketholder is eligible for the Ticket to Work Program. Although everybody ages 18 to 64 who's currently receiving SSI or SSDI is eligible for the program, the program may not be the right fit for every Ticketholder, such as those who want to work part time indefinitely. But if you encounter a Ticketholder that is committed and willing to try to become employed and work toward financial self-sufficiency, the EN can work closely with them to provide the services and the supports to help them do so. Once an EN completes their training and they gain access to the Portal, you'll be able to go in and assess the status of the Ticketholder's Ticket, whether it's in use or not in use or terminated. It is imperative that you have a conversation with the Ticketholder that clearly relates the goals of the Ticket Program in advance of you completing the Individual Work Plan.

During your Intake conversation, your EN and the Ticketholder should discuss joint expectations and jointly decide if this would be a good working relationship. This process helps you to ensure that your organization can provide the necessary services, resources, and ongoing support for their success. A thorough Intake discussion, as Derek mentioned, contributes to the next important step of creating a detailed Individual Work Plan that has clear and measurable goals. One resource that is very helpful during your Intake conversation is informing the beneficiaries of the goals of the Ticket to Work Program, which is linked on this slide and Glynis is going to post in the chat. This resource will assist you in clearly conveying the purpose and the expectations to the Ticketholder. Next slide, please.

There are key questions that you should also consider during your conversation. The first question — Has the Ticketholder considered their employment goals? You want to ensure they have already thought about going back to work and what that will look like for them.

Question two — Does the Ticketholder want to become financially self-sufficient? We all know that the goal of the Ticket to Work Program is for the Ticketholder to become financially self-sufficient. However, some Ticketholders have no desire to do so. So you want to ensure that is a goal for them and also that they want to provide for themselves. This barrier sometimes occurs due to a fear or a misconception about benefits, which is why it is also important to consider connecting that Ticketholder with a Benefits Counselor.

Third question to consider —What is the skill and education level of the Ticketholder? Knowing the skill and education level will help you to identify any additional skills, training, or formal education the Ticketholder may need to help them on their path to self-sufficiency. This will also help you to determine their earning potential. Our fourth question — Does the Ticketholder have any previous work and earnings history? Knowing the Ticketholder's work and earnings history will help you to better understand what experience the Ticketholder has as it relates to their employment goals. This could also give you an idea of how many hours the Ticketholder anticipates working.

Question five — Is the Ticketholder likely to make it to Trial Work Level, TWL, and then to Substantial Gainful Activity, so SGA, level earnings? If you know their previous work history, this can help you determine if they are likely to reach trial work level or SGA level earnings. Earnings and work experience will impact the kinds of services that the Ticketholder requires to gain their financial independence. Furthermore, if you believe there is a very low probability that the Ticketholder can reach the SGA level of earnings, then their goals may not align with the Ticket Program. Finally, do your services match the Ticketholder's needs? Ensuring that you clearly understand the needs and expectations of the Ticketholder will help you to determine if you have the appropriate resources and services to assist that Ticketholder on their journey to self-sufficiency. Next slide, please.

Through your discussion of your key questions, barriers may be brought up. It is important for you to identify and address any limitations or barriers that the Ticketholder may have as well as concentrating on their strengths and their competencies. Some barriers that you could encounter are the fear of the loss of disability or their healthcare benefits if they were to go to work, transportation issues, childcare issues, or simply their own fear of self-sufficiency. Your EN should have some facts about common fears or misconceptions about losing healthcare and disability benefits. We linked the resource "Debunking the Three Biggest Myths about Disability Benefits and Work" as a resource. You can use this when discussing Ticketholder barriers or misconceptions. We encourage your EN to share either this fact sheet or have some other type of informational packet that addresses the barriers. Understanding these barriers will help your EN to understand the services they will need to provide to ensure the Ticketholder's success.

Enough from me for now. Let's hear directly from some of our EN partners and how they conduct their Intake and identify barriers. I am pleased to welcome Nancy Gagnon, the Career Center Manager at the MassHire Lowell Career Center, a Workforce agency located in Massachusetts. Nancy, can you tell us a little bit about how your Intake process is and how you identify barriers to success? Over to you.

Nancy: Absolutely. Thank you. I believe, first of all, it's important to build a relationship, a professional relationship, with all Ticketholders. You have to build a relationship of respect and trust. During the Intake process, small talk, a small conversation goes a long way to doing that. For example, you might ask about their living conditions, if they have any pets, and you can jot that information down. The next time you're talking to them, you can go back to that. Maybe ask, "How is your son doing? Last time you told me he was struggling in math." Some type of conversation that allows them to relate to you. I want them to make sure that they understand this is a safe environment, that everything they say is confidential, that our records are confidential, that everything is locked up, and not anyone can see this information.

We cover the expectations to make sure it's clear for both parties. Everyone understands the outcome expectations for the Ticketholder to become self-sufficient and obtain full-time employment. We discuss barriers to employment and how they work, how we work with multiple agencies where we can blend and braid services to help with some of the barriers. Some of the items that we blend and braid here include clothing, daycare, training, transportation and so much more. We have many real partners throughout the MassHire system.

During the Intake process, we discuss labor market and skills the recipient has that are transferable. We verify these skills if they prefer to use an assessment. We use eSkill, which helps us determine their occupational skill levels. If a person does not have not much of an idea of what kind of career path best suits them, we'll use an MBTI, which is a Myers-Briggs Type Indicator. This is a personality test to help us understand their personality traits, strengths, and weaknesses. It's important to show that you care and want the best possible outcome. We can help with the process using assessment tools.

We use all this information to build a realistic IWP. We make sure they understand the IWP building can take more than one meeting. We develop this as a team, and it is a fluid document that we can go back to and revise at a later time. Thank you.

Brittney: Thank you, Nancy, for sharing with us today. We look forward to hearing from you later in our conversation. Next, I'd like to introduce Pamela Walker, CEO of Alliance Professional Services, a national EN located in Tennessee.

Pam: It's great to see you online. Thank you, Brittney. Brittney and Nancy both made great points. I'm going to talk about a few different things that we do, but identifying barriers to success is a very, very important part of the initial Intake process. By developing trust during that initial intake, the Ticketholder will feel more comfortable providing very personal information that they might not otherwise provide to you. Make the Ticketholder feel comfortable by setting aside dedicated, uninterrupted time for the initial visit and the Intake. This is also a great opportunity to discuss joint expectations such as services to be provided and required timely contacts so that they understand what they're getting into before they sign up. You want to provide all that information.

It's also a perfect time to be proactive by sharing the purpose, benefits, protections and basic Work Incentives of the program during that conversation. This will answer a lot of the questions that the Ticketholder may have, especially for those who are new to the program, and not familiar with it. They may have questions but they're not sure how to ask those questions. And so being proactive in answering some of the questions that we know all Ticketholders have on the front end will help them decide if they want to participate in the program. This will also help you, based on the services that they need and whether or not they are going to be proactive in the program, decide whether or not it's a Ticket that you feel comfortable assigning.

There's online basic training for some of these topics periodically, especially about the Work Incentives. If you haven't taken basic Work Incentive training, it's very, very helpful during that initial conversation. And once they get those answers, they are going to feel much more comfortable.

You also need to have discussions related to medical limitations because you have to know what kind of work they're going to be able to do based on what they have done in the past and what they can't and can do now. So, there are always barriers, and you want to find those out on the front end. So, medical limitations are a must.

You also want to address concerns or issues related to prior employment such as large gaps in work history, personal issues that may come into play. Criminal records or financial hardships are also important. And sometimes that's a difficult topic to start but you need to do it and sometimes you can do that just by asking, you know, "Is there anything else that I need know when we're trying to find employment for you? Is there anything that could impact the type of job you do or the types of job that you want to go after?" So, resolution of employment barriers, when possible, should be considered and included in the IWP.

Throwing out an example about someone who previously had trouble getting to work on time due to medication that made them oversleep. They were constantly being late for work and then lost that job. So, a simple idea that you could discuss with the Ticketholder is about looking for employment that starts in the afternoon instead of the morning. Look at different ways to hurdle whatever that barrier is.

Also, Ticketholders may be hesitant to provide information about a criminal background or the financial discussions that I mentioned earlier. I handle it just by asking, "Hey, is there anything else I need to know?" And that kind of opens the conversation. Also discussing likes and dislikes is helpful in developing the IWP end goals. What does the Ticketholder enjoy doing? Do they have any hobbies? Which of their prior jobs did they enjoy the most? Was it because they liked the task of the job or was it because they liked the people they worked with, or they just liked the environment? So, talk to them about those things because when you're looking for employment, you don't want to look for the same employment where issues were without resolving those issues. Take all of that into consideration. And just on a side note, we found that Ticketholders who have jobs they enjoy or who work in an environment that they like tend to remain employed for a longer term, which is important.

So, with all the information that you gather, the Ticketholder will be prepared to work with you to jointly develop that initial reasonable, achievable short-term and long-term goals and the timelines needed to complete those goals. With that, I will turn it back over to Brittney, I believe.

Brittney: Yes, thank you so much, Pam, for that insight, in choosing to speak with us today. We really appreciate both you and Nancy for joining us and your willingness to share your experiences with everyone. We look forward to hearing from you as well later during our questions and answers. Next slide, please.

Now that we have discussed the purpose of the Intake, some key questions to consider and some ways to identify barriers, we'll now discuss some elements that make up a great Ticketholder Intake, building a relationship with the Ticketholder, listening, managing the dialogue, treating the interview as a conversation, and looking for the best fit. So, let's dive in a little bit deeper into these elements. Next slide, please.

As both Pam and Nancy have stressed, and I also saw someone in the chat stress, building a relationship and trust is important and key during this Intake discussion. Ideally, this Ticketholder would be assigned to you for the next three to five years, so you want to make sure you are encouraging trust and building rapport. We encourage you to start to build a rapport a bit before diving into personal conversations about criminal background and disability. Pam mentioned that the Ticketholder needs to feel comfortable. It's important for that. One way to bring on that feeling of comfort is to, you know, start with your small talk. "How are you today? Did you have trouble finding the place? Tell me what you know about the Ticket to Work Program." Then you can dive into those topics that they discussed about their hobbies and interest and previous jobs. You want to build trust and engagement with the Ticketholder early on with the goal to build a long-term, back-and-forth relationship so that your EN is not trying to track down the Ticketholder every month to follow up. Next slide, please.

You want to let the Ticketholder do most of the talking during the conversation. This would allow you to get a better understanding of those barriers, expectations, concerns and goals that Nancy and Pam described. A lot of what they discussed can be achieved by using your active listening skills. This is a skill that involves showing interest, concern, and empathy. Some techniques include paraphrasing. "So what I'm hearing you say is" or "let me make sure I understand you correctly." Also providing brief verbal affirmations and validating their feelings, such as "I can see why you would feel that way" or "that sounds like a tough decision or situation." Also, practicing good eye contact if you are conducting an in-person Intake conversation or listening for pauses in voice inflection for virtual intakes. Finally, you should always summarize. “Let's recap what we discussed today.” This will help you to identify any key points and make sure you clearly understand what the Ticketholder is expecting and what their goals are. Using your active listening skills closely relates to how you manage the dialogue. Next slide, please.

Managing the dialogue by using a combination of open-ended and close-ended questions ensures you have your information to make your informed decision. Yes-and-no questions are best when clarifying or discussing their disability status or criminal background. Open-ended questions are best if probing for more information such as their necessary accommodations or how their disability may affect the type of work they choose. It's also good to avoid using TWL, or Trial Work Level, and Substantial Gainful Activity, or SGA, jargon. Although we use these terms daily, most Ticketholders are not as familiar with it, so during your conversation, try using dollar figures when discussing their earning potential. Next slide, please.

As you complete multiple Intakes, you will naturally find your flow. Pam mentioned using some open-ended questions. A good one that I think is a great question is, "Tell me about yourself." You can use questions such as these to build on follow-up questions and dive a little bit deeper into their background goals and desires. Next slide, please.

Now that you've started to build your relationship, you’ve listened to your Ticketholder's concerns and goals, and you’ve discussed your joint expectations, you're at the end of your conversation. You should now have a thorough understanding of the Ticketholder's service needs and determined together about whether this is a good fit. While letting the Ticketholder do the majority of the talking, you should also provide them with information about yourself. Tell them what services you're able to provide, maybe add a personal touch if you have a common factor between you and the Ticketholder because they need to make an informed decision as well.

If the Ticketholder is not a good fit for your organization, provide a warm hand-off directly to another EN or the VR agency if appropriate. If another EN is not known, please refer the Ticketholder to both the Choose Work website and the Beneficiary Support Help Line that Glynis is posting in the chat. The referral process is a key step in ensuring that the Ticketholder has all information necessary for them to make a connection with the new organization. Be sure to encourage and reassure the Ticketholder by letting them know they are still a great fit for the program and that they made the right decision. This will give them a little hope. If possible, it is encouraged that your EN follow up with the Ticketholder to ensure that they had some success in connecting with another service provider. Now, I'll hand it back over to Derek to segue us into the connection between Intake and IWP development. Thank you.

Derek: Brittney, thank you so much for going through quite a bit of content, a deeper version of the content that's in the EN guide for the Intake process. Before looking at the transition and that segue, I wanted to just take a moment to reflect on some content in chat. We've had quite a bit of activity going back to the original questions that I mentioned before. We've had some. "Are slides going to be available?" Yes. There was some discussion around the Myers-Briggs and Nancy responded about the Myers-Briggs Indicator test, she's using that and then also mentioned that eSkill is a good tool for occupational competency. Glynis posted about the VCU introduction to Social Security disability benefits, Work Incentives, and employment support as a helpful web course. And then we got into some more deeper thinking around Intake and the connection about who can qualify or not qualify, and we're going to hold those for the Q&A.
I wanted to call out Brian's chat comment about Pam's last statement about workers returning to work environments that they like, that's covered by the Minnesota Theory of Work Adjustment, Dawis and Lofquist's research from 1969 indicating that worker satisfaction and satisfactory-ness of the job is an indication of tenure. So thanks for that, Brian. The chat will continue, and I will repeat the dates of the next training sessions before we wrap up today. So to this slide, really, the next step of connecting Intake to IWP with Ticket assignment and work as the objective, both the Ticketholder and EN mutually agree that they are a good fit, then the next step involves development of that IWP that will lead to Ticket assignment to work, and of course, hopefully, to this pathway of self-sufficiency. With that in mind, we're not going to dive in today to the development of the IWP. That will be in the next sessions, but we do move to the next slide.

We're starting to see a little bit of this in the chat. On the next slide, we talk about reflections. What would you like to change or add to your Intake process? Now that you're starting to hear the content, we have the EN guide that pulls the requirements from the RFA with some examples. We've heard from a couple of ENs about their techniques, and we're starting to see some suggestions in chat. If you have any reflections you'd like to share in chat, we encourage you to do so as we transition now to the Q&A portion of our session. Next slide, please.

We are ready for Q&A, and I would ask that our training team turn on their cameras so we would be able to have them ready to take your questions. If you have questions focused on the IWP, we request those be emailed to ENoperations@yourtickettowork.ssa.gov and we'll address those through that channel or come to the next two sessions in August and September. As a reminder, to ask a question over the phone, please raise your hand on Teams by *5. And if you are called upon, you will need to unmute and then press *6 to do so. Two steps by telephone.

For participants through Teams, please use the raise your hand feature and then identify yourself, your EN by name, and then ask your question. Again, we ask you to limit your questions to one per person so we could have several.

At this point I would like to ask Tammy Liddicoat to come up. We've had some questions in chat, Tammy. Would you be able to pull one of those out and see if we can get the Q&A portion started with that?

Tammy: Yes. Hi, Derek, and hi, everyone. As Derek mentioned earlier, we had several questions related to the summary and where it went, where it goes on the IWP. We had those earlier, so I'm just going to review a couple of those questions, and I think these are directed to Mary Kay. And if there needs to be a summary, why is it not a field on the IWP or where is it on the IWP? Go ahead, Mary Kay.

Mary Kay: To answer that question, it is actually correct on the 1374 that ENs have the opportunity to use if there is not a text field built in there. We did send out a GovDelivery message back in May of 2022 and we continue to share that information when we speak with ENs individually. But you can, under the Terms and Conditions, which is Part three of the 1374, under the 15th Term and Condition is "Other" and you can use that space to enter that Discussion Summary or you can simply draft it on a separate sheet of paper or, Word document, and attach it to the IWP. And there was a question about whether or not it is required to have that attachment signed, and the answer is no, as long as it is attached to the signed IWP.

Tammy: Great, thank you, Mary Kay. This is Tammy again. I'll ask another question that we got in the chat, and I think this one is a good question for either Pam or Nancy. Will you discuss how to handle the discussion with a client who isn't an appropriate candidate for Ticket to Work but insists on doing it?

Pam: I'll be glad to provide some feedback on that. We do several things. First, if we feel they are not a good candidate at this time, that's what we tell them, but we never just turn someone away. We always provide an alternative, whether that is contacting Vocational Rehabilitation or brushing up on their skills using online options that we can provide to them, and because they have reached out to us, we're able to keep and maintain their contact information. So, I usually tell them, "Check back with me in 90 days." I give them what I call homework assignments because I want to make sure that they're going to be proactive, since they're so insistent that they want to participate in the program. I also spend a little bit more time talking about timely progress and what that means because I don't want to assign someone whose goal is to stay on Social Security disability benefits forever. And so explaining that timely progress, especially as it relates to medical reviews is important, and sometimes if they realize that it doesn't mean they're going to be permanently not eligible for medical reviews on the front end will let you know that's their intent, and discussing timely progress takes care of that situation.

Tammy: Great. Thanks, Pam. Derek, do we want to move to questions over the phone yet?

Derek: Yeah, let's do that, Tammy. Thank you. Katherine, I think we have someone with their hand raised if you can help get to those for us, please.

Katherine: Absolutely, Derek. We have Bliss Hayes. You are unmuted. Please ask your question. You'll need to unmute, Bliss, and go ahead and ask your question, please. Try it now, Bliss.

Bliss: Thank you. I did unmute. Can you hear me? Okay, so what if the Ticketholder initially aligns with the services provided by the Employment Network but their ultimate goal is something that the Employment Network doesn't provide, like voice acting or running an online clothing boutique, which doesn't fall within the scope of the network services, but they are using the Employment Network as a stepping stone? Would it be appropriate to assign this Ticketholder?

Derek: Mary Kay, would you like to start us out there with a comment, and then maybe we go over to the EN reps for their perspective?

Mary Kay: Yeah, I'm going to say that that's probably going to be a discussion, an individual discussion with. Sometimes we need more information like what is really going on with this particular Ticketholder, the expectations. I would ask that this EN reach out. If you reach out to us individually, we can take that question back and do a little more research if you can provide us some details.

Derek: Nancy or Pam, do you have any thoughts on that when you encounter a similar situation?

Pam: I would definitely have them look into the labor market and look at it realistically. Can you be self-sufficient on the career path you're choosing? And we would go down on a discussion path that way.

Derek: More of a like stepping-stones type process?

Pam: Mm-hmm.

Derek: If we begin work here, the labor market might have other full-time opportunities?

Pam: Right. What is transferable, where do you intend to be.

Derek: Thank you. Pam, any additional comments?

Pam: Yes, it would take more information and more discussion because it may be that that is a 10-year plan. But right now, they need to start putting money aside to start that business. And so, it depends on, is that a 2-year plan or a 10-year plan and what are the stepping-stones to start aligning things? But, you know, if they're starting their own business or something like that, we might want to go and connect them with a small business administration and things like that, so they know what's involved. Once they know what's involved and what the cost is, they may change their mind about, you know, that long-term goal. So it just requires a lot of discussion.

Derek: Thank you, Pam. Appreciate those additional thoughts. Alright, Katherine, it looks like we have another hand raised.

Katherine: Yes, we do, Derek. We have Brandy. You are unmuted. Go ahead and ask your question, please.

Brandy: Hi. My name's Brandy Mizeco. I work with AHEDD, and my question is actually going back to what Pam was saying earlier in regard to people who are looking more for part time, who may not be a good fit for Ticket to Work. You mentioned homework, like "homework assignments" that you might give them. Can you give some more examples about what those might be?

Pam: Certainly. It could be something as simple as asking them for a list of their prior work history. Obviously, we can't prepare a resume if they don't have a resume, so that information is also needed if we decide to move forward. But if someone has that information back to me in a reasonable period of time, then we will reconsider and, you know, see if it is a good fit. But if I don't hear from them for six months, they are not serious about participating in the program. So that's just an example. If there is a job goal, we might give them some information and say, "Take a look at this and make sure that is really what you want to do. Look at the job tasks that are associated with it, of those things you're comfortable doing." And again, if they review the information that we send them in a reasonable period of time, that's one thing, but if they wait a very long time before responding, you know, then that's a sign they're not going to be proactive in the program generally.

Brandy: That makes a lot of sense. Thank you.

Derek: Thanks for the question, Brandy, and I appreciate your response, Pam. Let's go back to Tammy. Tammy, there has been some more activity in chat. There was a question a couple times, "Will slides be made available?" and the answer is yes. This is a pilot for doing the EN Essentials training. We do hope to release the recordings as well but based on our activity, we'll be in touch if that happens, but we'll be releasing the slides. And we do like to modify the EN guide as we learn more and have a broader discussion. We look to grow the resources that are inside the guide itself. And lastly, I'll note somebody asked a question about the Ticket to Work training we are required to do, will it be updated, and the answer is yes. Ticket Program Manager, TPM, is working closely with SSA on that update plan for the modules. As you might imagine, that's a large project, but we are working through that process, and we'll be working with SSA to provide updates when appropriate. Tammy, back to you. Any questions that you can pull out for our training team today?

Tammy: Another question that we had was, "Do you have an example of an Intake questionnaire or information-gathering tool that you use?"

Mary Kay: Yes, there is an Intake sample form on our website. I think if you look under Resources or Forms, and I'm sure we could get that for you and provide that.

Derek: I'm going to jump in here. There was a question — There's several questions in chat, and we're have to capture those and respond to them because we're going to run out of time. But we did receive a question about, "How do you use blended and braided funding?" This came up a little bit earlier, but how do you use that to ensure all needed services identified during the Intake discussion can be provided for a Ticketholder? That one connects with another question that I read in chat like, let's say somebody has a language barrier and they want to receive English as a second language training attached to employment pathways. Any thoughts, Nancy, first?

Nancy: Yeah, that one's a little bit tough because every EN service is going to have different connections out in the community and different relationships. So, for example, one of our community partners offers transportation depending on, you know, where the employer is and what their circumstances are financially. And not all areas have that access. We have access to a clothing or Suitability is what they call it, where if we refer somebody over, they can give them outfits to go to work. So unfortunately, not all ENs, depending on where they lie or their offices are, their relationships will be different for everybody and what kind of services. But most MRCs, in their voc rehab, will be able to offer some additional supports as well that would be for everyone such as transportation or job coaching that might be available in their areas.

Derek: Thank you, Nancy. We're going to take one last question and then we're going to have to go to wrap up, so, Katherine, if you could go to the raised hand for the final quick question, please.

Katherine: Absolutely, Derek. We have Jennifer who has a question. Jennifer, you are unmuted if you will just unmute and ask your question, please.

Jennifer: Great, thank you. Yeah, I just had a more technical question about it because I just did the training. I finished it back in 2022, and I know you're saying the Discussion Summary isn't mentioned right now in that training. So I guess I'm trying to understand, like, when we're going through IWP reviews, for example, what's the date at which the Discussion Summary was implemented? Is it a requirement so we know, like, do we need to go back and update IWPs? I'm just trying to understand, like, when that actually came into play to make sure that we're in compliance with our plans.

Derek: That is a great question. Mary Kay, go ahead.

Mary Kay: Sure. So, the Discussion Summary has been a part of the TPA requirement in the RFA for quite a while. We sent out the email back in — the GovDelivery message to clarify —back in May of 2022 regarding the need for the Discussion Summary to be included and where the best place to enter that Discussion Summary as well.

Jennifer: So if we have, for example, since it's not included in the training and new providers may not have received that message, if we have done things like case notes, is that acceptable? Does the case note need to be reviewed and signed by the individual?

Mary Kay: Yes. So, we would — at this point, again, I'm going to kind of table that if we can because it is going to depend on if it's a brand-new EN, then maybe they did not —

I'm thinking they might not then have had the Discussion Summary piece, but that would go to our training team to clarify. But prior to that, if it's not a brand-new EN, the EN program contact and signature authority should make sure that their team is aware of those requirements as well.

Derek: Thank you very much for the question. We're going to continue to update the training materials to align as closely to the TPA detailed requirements, and that will include updating the mandatory training modules.

At this point, 60 minutes goes quickly, and we need to proceed to the conclusion of today's training session. I do thank our team. If we can move to the next slide, please.

We do have many resources available. On this slide, part one: we have the links to what is the Ticket to Work Program, the Debunking the Three Biggest Myths, and informing beneficiaries of the goals of the program, being employment, benefits reduction, and self-sufficiency. And of course, the fourth, the Ticket to Work Intake Tool, and Mary Kay was referring to that along with Glynis posting resource links throughout the session.

On part two of resources on the next slide, we have three more resources we always encourage, of course. We have the Choose Work website, where we encourage folks to go to explore success stories and stepping-stone stories, and also to examine the second link here, the Find Help tool where they can access Employment Networks but also Benefits Counselors and other members of their employment team. And last, we always encourage Ticketholders and beneficiaries to reach out to the Beneficiary Support Help Line to reach beneficiary support for a very customized individual discussion. So, all these links are also available in chat, and we encourage these resources to be shared broadly. Next slide.

As I mentioned, today's training session was the first in our EN Essentials series. We do have some other upcoming events. And we don't want to skip over our next All EN Call. That's scheduled for August 22. It will be from 1:00 to 2:30 p.m. Eastern time. Again, August 22, 1 to 2:30 p.m. Eastern time.

The next EN Essentials learning events will be on August 23, part one of "Developing and Maintaining Successful Individual Work Plans." And then on September 20, we'll go into part two. Some of the questions we had today will certainly be brought up during those sessions, and we look forward to welcoming Mary Kay back to be a detailed part of that training team. Next slide, please.

So, I do thank you all for joining us today. I would like to again thank our entire team and especially Brittney Boyd and Glynis Moore for developing the EN guide and the content that was allowed to drive this training session today.

If you do have feedback recommendations or other ideas for future training sessions, please reach out to us through email at ENoperations@yourtickettowork.ssa.gov . That EN Operations email address is now available in chat. And with that, we thank you all again for your commitment to supporting Ticketholders through the Ticket to Work Program and your partnership as Employment Networks and wish you a safe and good afternoon. This ends this EN Essentials training program.