



Ticketholder Intake Guidance and Worksheet

GUIDANCE

This guidance will help Employment Network (EN) staff understand the purpose for conducting an intake discussion under the Ticket to Work (Ticket) Program and will also cover:

1. Ways to engage with a Ticketholder during an intake discussion and what information to cover.
2. Sample questions to ask.
3. How the intake discussion relates and contributes to the requirements of the Individual Work Plan (IWP).

Ticketholder Intake

The purpose of the intake discussion is to:

1. Determine the Ticketholder's eligibility for the Ticket to Work (Ticket) Program.
2. Inform the Ticketholder about the purpose and goals of the Ticket Program.
 - a. [Informing Ticketholders about the Ticket to Work Program](#)
3. Discuss the Ticketholder's short- and long-term 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.

Intake Discussion and the Individual Work Plan (IWP)

If the intake discussion results in a determination that the Ticketholder and EN are a good fit, the next step is to develop an IWP for the Ticketholder. As part of the IWP, the EN must document that a one-on-one individualized discussion (intake 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.

ENs must document the discussion and include it on the IWP Form SSA-1370, or as an attachment to the IWP. While using the Form SSA-1370 is recommended, it's not mandatory. If you decide to create your own template, ensure it covers all the required elements outlined in the Ticket Program Agreement (TPA).

At a minimum, the documentation for discussion summaries should include:

- Date of the discussion
- Modality of the discussion (e.g., face-to-face, telephone, etc.)
- A Discussion Summary:
 - Your assessment that the Ticketholder's short-term and long-term goals are reasonable and attainable.
 - How your EN's services and supports will assist the Ticketholder with achieving their goals.

ENs have four options for documenting the Discussion Summary (all options must meet requirements):**1. Use [IWP Form SSA-1370](#)**

When using this form, you can add the discussion date and modality in Part Two, Documentation of the EN-Ticketholder Discussion, Section 1, under "Discussion Arrangement". If no other terms and conditions are identified, you can add the Discussion Summary under Part Three, number 15, of the same form.

2. Create the Discussion Summary as a separate document

This document should include EN Name, EN Provider ID, Ticketholder Name, Social Security number, and Discussion Summary. Signatures are not required. The Discussion Summary document must be maintained with all other Ticketholder records and be available upon request by SSA or the Ticket Program Manager.

3. Include in case notes

ENs can include the Discussion Summary in case notes as the first case note, but it must be clearly identified as the Discussion Summary.

4. Part of an EN created IWP template:

ENs that do not currently use Form SSA-1370 can update their IWP template to include a Discussion Summary section or use a separate document. If using a separate document, refer to Discussion Summary option 2 for directions.

WORKSHEET

Intake Discussion

Date of Discussion:

Modality of Discussion (in person, voice call, video call):

Interviewer Full Name:

Ticketholder Full Name:

Mailing Address:

Email:

Phone Number:

Age/Date of Birth:

Additional Notes:

TREAT THE INTAKE AS A CONVERSATION

- Ask the Ticketholder about themselves and develop a rapport before moving on to asking specific questions.
- Engage in a natural conversation that discovers a Ticketholder's interests and experiences and identifies the supports and services they need to achieve goals and dreams.
- Ensure that the questions flow and are connected.
- Build in follow-up questions for the Ticketholder's responses to either dive deeper or bridge to the next topic.
- Understand the Ticketholder's needs and determine whether your organization is a good fit for the Ticketholder.

KEY QUESTIONS AND FACTORS TO CONSIDER IN THE INTAKE DISCUSSION

1. Has the Ticketholder considered their employment goals?
 - ✓ What kind of career guidance are you looking for (for example: finding work that matches your skills and background, finding a career that is in demand, questions on wages for a job or career)?

 - ✓ What type of job are you looking for? If you had the perfect job, what would that job be like?

2. Does the Ticketholder want to reduce and, whenever possible, eliminate dependence on Social Security Disability Benefits?
 - ✓ What do you really need from your job? Do you want to make enough income to support yourself financially?

3. What is the skill and education level of the Ticketholder?

- ✓ What level of education do you have? Would you like to pursue any type of degree or further education? (for example, GED or college courses)

- ✓ Is there any special training you would like to receive (for example, computer training or management training)?

4. What type of workplace would be best for the Ticketholder?

- ✓ What work environment would you enjoy the most? (Are you more comfortable with close supervision? Remote work? Do you like to prioritize your own work? Do you like fast-paced work or prefer a slower pace?)

- ✓ Do you prefer to work independently or as part of a team?

- ✓ Do you prefer to work in an office, in retail, or outside? Do you like quiet?

5. Does the Ticketholder have any previous work and earnings history?

✓ Where have you worked in the last few years?

✓ What type of jobs did you perform and what job titles did you have?

6. Is the Ticketholder likely to make it to Trial Work Level (TWL) and then to Substantial Gainful Activity (SGA) level earnings?

✓ What is your desired income if you become employed?

✓ How many hours do you expect to work? Is there a certain time of day or week that will work better for you? (For example, are evenings or weekends better?)

7. Please add any additional question(s) here that you would like to ask the Ticketholder to discuss.

THINGS TO IDENTIFY:

1. Ticketholder short-term and long-term employment goals.

- ✓ What are your immediate or short-term work goals?

- ✓ What are your career or vocational goals (for example, finding a job immediately, retraining for a new career, on-the-job training)?

- ✓ Where do you see yourself in 3-5 years in your success with your career or vocational goals?

2. Any Ticketholder limitations.

- ✓ Are there other current issues or challenges that may impact your interest in your career or work goals (for example, family, health, relocation considerations)?

✓ Please describe your disability as it relates to your ability to perform the work you desire and describe any reasonable accommodations you know you will need.

✓ How will you get to a job? Will you need transportation assistance?

✓ Is there a certain time of day or weekdays that are better for you for working (for example, evenings or weekends)?

3. Strengths and competencies that will help the Ticketholder overcome barriers.

✓ Please tell me about skills you've gained as an employee or a volunteer.

✓ What do you like to do – what hobbies or interests do you enjoy?

✓ What job search skills do you have now and what skills would you like to learn or refresh (for example: resume writing, interviewing, or networking skills)?

✓ Are you a veteran? What skills did you obtain in the military that may be transferable to private or public sector occupations?

4. Any fears of potential loss of benefits.

✓ Do you have any limits on how much you want to earn? If so, could you explain?

✓ What public benefits are you most worried about if you pursue working?

✓ Have you ever talked with a benefits counselor about how work with impact your benefits?

5. Do your services match the Ticketholder's needs?

✓ After our conversation and you've heard about how we can help you, do you think our services are a good match for you?

✓ Would you like to work with us to pursue employment?

✓ If we both choose to work together, will you agree to stay in frequent contact, (at least monthly) engage and respond to us promptly while you are working with us?