

# Beneficiary Intake Process

Ticket Program Manager (TPM)

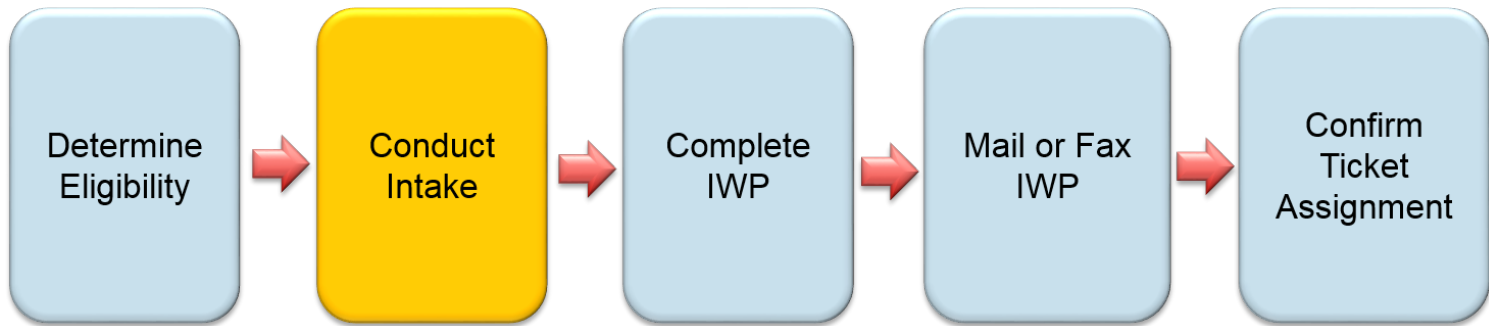
Social Security's Ticket to Work Program



# Objectives

- Identify questions that would be important to ask during beneficiary intake.
- Discuss how to utilize the Ticket to Work Intake tool during beneficiary intake.
- Identify two questions to ask yourself when determining if a beneficiary is a good fit for your Employment Network (EN).
- Discuss when to use open-ended and closed-ended questions.
- Identify three elements of a good beneficiary intake.

# Assigning a Ticket



# Dave



# Meeting with the EN

| <b>Assessment:</b>   | <b>Identify:</b>   |
|--|--|
| <ul style="list-style-type: none"> <li>✓ Do the services you offer match the beneficiary's needs?</li> <li>✓ Does the beneficiary have previous work history?</li> <li>✓ Is the beneficiary likely to make it to Trial Work Level (TWL) or Substantial Gainful Activity (SGA)?</li> <li>✓ Does the beneficiary desire to become financially independent?</li> <li>✓ What is the skill and education level of beneficiary?</li> <li>✓ Does the beneficiary have a history of prior earnings?</li> </ul> | <ul style="list-style-type: none"> <li>✓ Limitations</li> <li>✓ Past employment issues</li> <li>✓ Strengths and competencies</li> <li>✓ Fears</li> <li>✓ Housing</li> <li>✓ Childcare</li> <li>✓ Medication</li> <li>✓ Transportation</li> </ul> |

# George



# Beneficiary Interview



- How much are you looking to earn from employment?
- Do you have SSDI or SSI benefits?
- Have you ever been convicted of a felony?
- Disability
- Credit History
- Education
- Past Job Success
- Do they have computer skills?
- Can they complete a job application independently?

# ACME Rehabilitation's New Plan

## Screening Criteria

1. If a Beneficiary is coming to my company for a job, would I hire them?
2. Can I find you a job with your current skill sets?
3. Can I find the beneficiary the job that we agreed upon in the IWP?



# Group Discussion I

1. What are some instances where you may have to say “No” to a potential client working with your agency?
2. Provide an example where there was a beneficiary that was not a good fit for your agency?
  1. How did you tell them that they were not a good fit?

# George's Elements to a Great Beneficiary Intake Discussion

- Build rapport in the beginning
- Understand the beneficiary's circumstances and needs
- Determine if the beneficiary is a good fit for your Employment Network

## Continued Elements of Great Beneficiary Intake

- Let the beneficiary do most of the talking
- Listen
- Use a combination of open-ended and closed-ended questions

# Ticket to Work Intake Tool



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TTW / Information Center / Resource Documents

- Calendar of Events
- Suitability
- Ticket Portal
  - Ticket Portal Resources
- APOR
- Training
- Resource Documents**
- Forms
- Events Archive
  - 503 Readiness Training
  - 503 Community of Practice

## Resource Documents

There are several resources available to service providers as they work with beneficiaries. Check this section of the Information Center frequently for updated resources and tools.

### Program Resources

- How to Become an Employment Network (PDF)
- Self-Assessment Tool for Potential ENs (DOC)
- Essential Tools for EN Success (PDF) (PPT) *New!*
- EN Suitability Requirements (PDF)
- Employment Network Suitability Guide (DOC) (PDF) *New!*
- State VR Agency Suitability Guide (DOC) (PDF) *New!*
- EN Performance Indicators (PDF)
- Comparison of Roles When State Vocational Rehabilitation (VR) Agency Serves Beneficiaries under Cost Reimbursement or as an Employment Network (EN) (PDF)
- **Ticket to Work Intake Tool (DOC)**
- Informing Beneficiaries of the Goals of the Ticket to Work Program: Employment, Benefits Reduction and Self Sufficiency (PDF)

# Questions

