

Essential Tools for EN Success: Part 1

Ticket to Work
Operations Support Manager

Objectives

Content

- Show examples of what other Employment Networks (ENs) are doing
- Provide ideas on how you can more efficiently run your EN

Application

- Use these ideas in your agency
- Create your own forms that fit your model
- Increase your Ticket activity and track results

Goals and Timelines

- Set goals and performance benchmarks
 - Break them down monthly
 - Set them for individual staff members

- Motivate staff to take ownership of the program

- Track monthly to see where you are

Social Security Knowledge

- Learn basics to guide beneficiaries through effect of work on disability and medical benefits
- Know Social Security rules, Work Incentive programs and rules, cash benefits
 - SSA Red Book – www.socialsecurity.gov/redbook/
- Work Incentives Planning and Assistance (WIPA) support good, but need in-house knowledge too.
- Know enough to navigate the payment process for the Ticket to Work program
- Beneficiary Overpayment Fact Sheet in the Information Center, Resource Documents - <https://yourtickettowork.com/web/ttw/resource-documents>

Interest Form

- Tired of tracking Ticket phone calls with “sticky notes?”
 - Utilize a handy form to track new Ticket calls
 - Use this form for initial data entry to database
 - Track monthly calls and referrals for marketing purposes and staff work flow.





TICKET TO WORK INTEREST FORM

DATE: _____

<p>Name _____</p> <p>SSN _____</p> <p>Home # _____</p> <p>Cell # _____</p> <p>Address _____</p> <p>City/St/Zip _____</p> <p>County _____</p> <p>Time Zone <input type="checkbox"/> Pacific <input type="checkbox"/> Mountain <input type="checkbox"/> Central <input type="checkbox"/> Eastern</p> <p>Email _____</p>	<p><input type="checkbox"/> Y <input type="checkbox"/> N <i>Age between 18-64</i> _____</p> <p><input type="checkbox"/> Y <input type="checkbox"/> N <i>Receiving: SSDI _____ SSI _____</i></p> <p style="padding-left: 40px;"><input type="checkbox"/> Medicare <input type="checkbox"/> Medicaid</p> <p><input type="checkbox"/> Y <input type="checkbox"/> N <i>Goal to obtain employment in order to eventually get off SSA benefits?</i></p> <p><input type="checkbox"/> Y <input type="checkbox"/> N <i>Any activity with other EN's or VR?</i></p> <p>_____</p> <p><input type="checkbox"/> Y <input type="checkbox"/> N <i>Payee?</i></p> <p>_____</p>
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Disability

Nature of disability: _____

Limitations: _____

Employment/Goals

Job interests? _____

Last job? _____ Type work? _____

Education? _____

Referred by:	
<input type="checkbox"/> BASS <input type="checkbox"/> Maximus <input type="checkbox"/> SSA <input type="checkbox"/> VR <input type="checkbox"/> EN <input type="checkbox"/> Newspaper <input type="checkbox"/> Flyer <input type="checkbox"/> Friend <input type="checkbox"/> Family <input type="checkbox"/> Other: _____	Job Centers: <input type="checkbox"/> Visalia <input type="checkbox"/> Porterville <input type="checkbox"/> Kern <input type="checkbox"/> Fresno <input type="checkbox"/> Dinuba <input type="checkbox"/> Hanford

Comments:

Office use only:

Appointment: <i>(Date/Time/Place)</i>	Added to Database Date: _____ By: _____
Check Ticket Assignability on the Portal	
Assignable? <input type="checkbox"/> Y <input type="checkbox"/> N Date: _____	In-Use with VR? <input type="checkbox"/> Y <input type="checkbox"/> N Previously assigned with VR? <input type="checkbox"/> Y <input type="checkbox"/> N If yes, was case closed successfully? <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Confirmed w/DOR Date closed: _____
<input type="checkbox"/> Not in System Referred to SSA: 1-800-772-1213	

Keep Track of Your Data

- Track clients, services provided, employment outcomes and other pertinent data
- Include fields needed for the Annual Performance Outcome Report (APOR) that the Social Security Administration (SSA) requires
- Track staff progress and Ticket program goals – Save staff time

Benefits Planning Query

- Benefits Planning Query (BPQY) has a wealth of information about client's case
- Ticket Holder can request by calling: 1.800.772.1213 (voice) or 1.800.325.0788 (TTY/TDD)
- EN can request by having Ticket Holder sign both BPQY releases (SSA-3288) when signing the Individual Work Plan (IWP)
- To get BPQY, fax release forms to Social Security field office.
- Contact your Area Work Incentives Coordinator (AWIC) for more information on how to obtain.
- BPQY Handbook on SSA's website:
 - http://www.socialsecurity.gov/disabilityresearch/documents/BPQY_Handbook_Version%205.2_7.19.2012.pdf

Release of Information - Employer

- What if clients don't give you their pay stubs?
- Get Employer Release of Information Form signed up front, same time as IWP.
- Use this form to fax to employer, request earnings information, but do not divulge any information relating to your client's disability or participation in the Ticket to Work program.

AUTHORIZATION TO RELEASE INFORMATION

I, _____, authorize my employer to release any and all pertinent employment information (start date, salary, ending date, etc.) as well as current address and phone number to any Your Agency Name staff person who calls/faxes to verify employment. I understand this information is required to assist in keeping accurate data regarding job services. By signing below, I give my consent to the Release of Information and will receive a copy of it upon request. **This authorization shall be valid for five years from the date signed.**

Signature

Date

Checklist for Client File



- Simple list of functions to do on all cases
- Check them off as you go
- Can easily track your activity at a glance
- Saves time rather than sift through the file.



TTW Checklist

TTW CHECKLIST

INTERVIEW:	
NAME:	DATE COMPLETED
Interest Form	<input type="checkbox"/>
Assessment/History form	<input type="checkbox"/>
IWP/Beneficiary Agreement (Copy to Client)	<input type="checkbox"/>
BPQY Release - SSA	<input type="checkbox"/>
BPQY Release -IRS EARNINGS	<input type="checkbox"/>
Employer Release of Info	<input type="checkbox"/>
Voluntary Release of Info	<input type="checkbox"/>
Media Release for Success Story	<input type="checkbox"/>
18 month prior look back	<input type="checkbox"/>
Driver's License/ID Copy	<input type="checkbox"/>

POST INTERVIEW:	
Input client information into database/update as needed	<input type="checkbox"/>
FAX IWP to Maximus	<input type="checkbox"/>
Received Ticket Assignment confirmation from Maximus	<input type="checkbox"/>
FAX BPQY to Social Security Administration	<input type="checkbox"/>
Received BPQY from SSA	<input type="checkbox"/>

JOB READINESS/EMPLOYMENT	
Develop Resume	<input type="checkbox"/>
Master Application	<input type="checkbox"/>
Enrolled with American Job Center	<input type="checkbox"/>
Employment Questionnaire Completed	<input type="checkbox"/>
Employment - Start Date	
Trial Work Period Months used	0 Used ()
Month of Cessation	

REFERRALS TO:	REASON	DATE

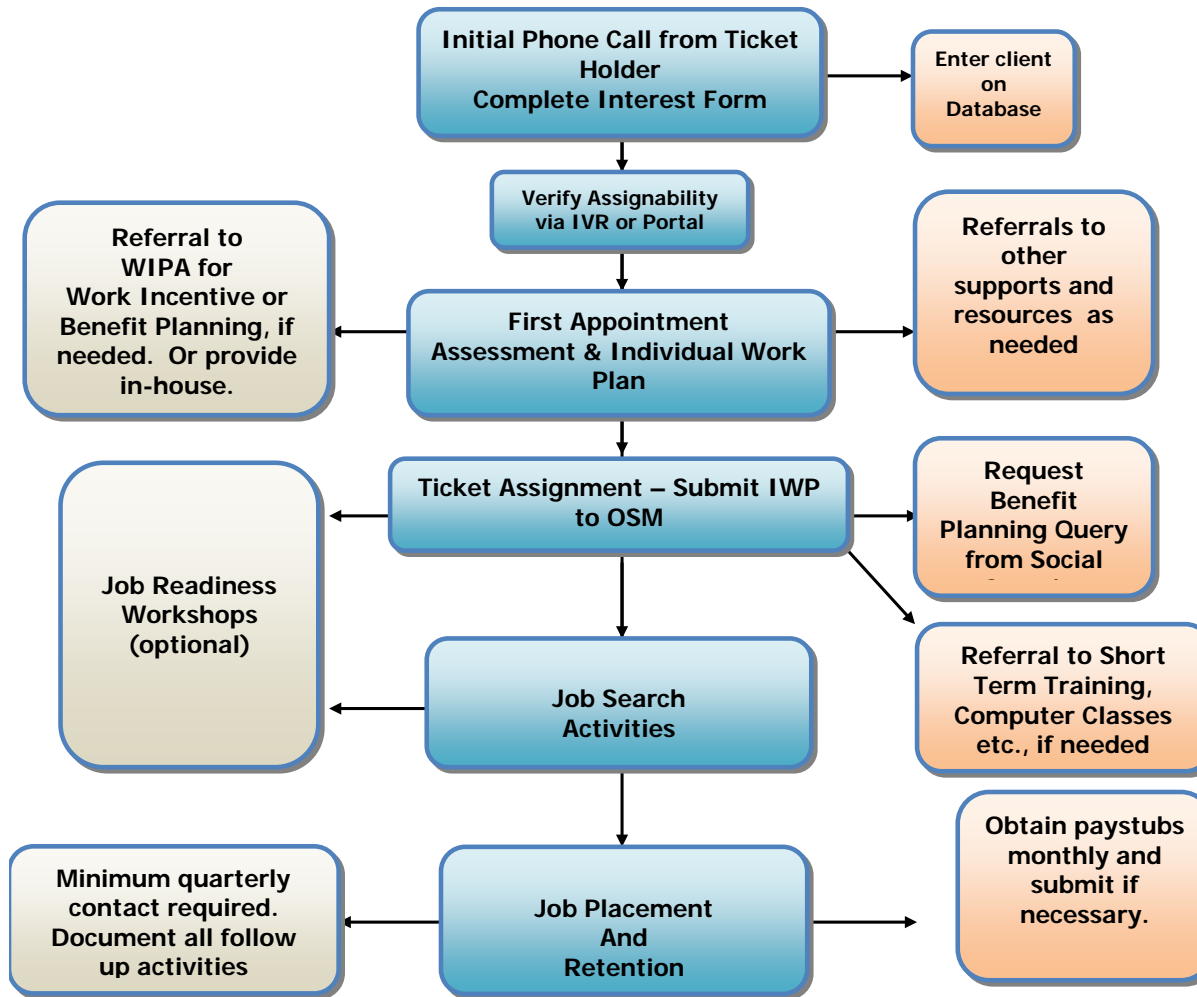
Special Note: _____

Develop a Flow Chart

- Who will do what, in what order?
- You can attach staff names to each task.
- Be sure to take advantage of outside resources.
- Keep it simple – the fewer staff your client must see for services, the better.



TICKET TO WORK FLOW CHART



Training and Resources

- Take advantage of training and resource documents the Operations Support Manager provides
 - Ticket Training Tuesdays – First three Tuesdays of the month at 1 p.m. EST
 - Training at <https://yourtickettowork.com/web/ttw/training>
 - Resources and tools at <https://yourtickettowork.com/web/ttw/resource-documents>

Monthly All Calls

- Monthly All Calls
 - All EN Call – First Thursday
 - All Vocational Rehabilitation (VR) Call – Second Tuesday
 - All EN Payments Call – Fourth Tuesday
 - All monthly calls are at 3 p.m. EST. Visit www.yourtickettowork.com, Information Center, Calendar of Events for details

Technology

Take advantage of the technology that is available to ENs, including:

- Ticket Portal
 - Check Ticket assignability
 - Check Ticket history
 - Assign and unassign Tickets
 - Track payments
 - Obtain reports
 - Track all transactions

Website Recognition

- Incorporate information about the Ticket program on your organization's website.
- If you have a Ticket website, link to your Ticket it from the EN Directory on www.chooseworkttw.net
 - Complete the EN/BPA Change Form to add the link (available at <https://yourtickettowork.com/web/ttw/forms>)
- Consider adding an online interest form to your website.
- Promote your website on any social media platforms you use (Facebook, Twitter, etc.)

Appropriate Name

- Does your agency or Ticket program name give away too much information, breach client confidentiality, or inaccurately describe what you do?
- What first impression does a potential client get when they see your agency's or EN's name?
- You can set up a “Doing Business As” (DBA) and attach a name to your Ticket program. For DBA, use the EN/BPA Change Form.

Get the Word Out

- Use Press Releases or Public Service Announcements to promote your organization's Ticket program to local news media.
- Launching or expanding the Ticket program
- Include a "success story" of a client's improved life or enjoyment of work. News media loves a "feel good" story.



June 25, 2008

For Immediate Release

Contact: *Robert Herman*
Public Information Officer
559/733-6606
cell 559/901-3445

Tulare County Office of Education Announces:

**EXPANSION OF THE TICKET TO WORK PROGRAM TO SERVE
PEOPLE WITH DISABILITIES**

Visalia – The Tulare County Office of Education is pleased to announce that its Services for Education and Employment (SEE) program is expanding their popular Ticket to Work program that provides job services to people on Social Security Disability and SSI effective July 1, 2008.

SEE has a contract with the Social Security Administration as an Employment Network for the national program that began in California in November 2003. Employment Networks assist persons on Social Security disability who want to return to the workforce.

Their program called “A Ticket to Success” will be able to assist more people with disabilities according to the new rules which will be implemented July 1st 2008. The new rules will enable all people on Social Security Disability between the age of 18 and 64 to participate on a voluntary basis. A Ticket to Success will now be able to provide job readiness and job placement services to those who want to work part time at first, to see if they are able to work and eventually become totally self-sufficient. Locally the program serves people with disabilities who live in Tulare, Kings, Fresno, and Madera Counties, and other areas as well. The program has been successful in assisting over 225 people with disabilities return to work.

(Add success story here)

“We are very excited about the possibility of serving more people under the new rules of the Ticket to Work program” says Karen Davidson, Regional Coordinator. The program allows participants a variety of work incentives and the ability to keep their Medicare and/or Medi-Cal after they return to work, thereby eliminating the fear many have of returning to work.

For more information on the Ticket-to-Work program, call (800) 540-0307, or visit www.tcoe.org/tickettowork

Script for Incoming Calls



- Does your staff know what to say when a person makes that first call about his/her Ticket?
- Helps to have a script or talking points, so the caller's first point of contact answers their questions:
 - Benefits of signing up for Ticket program
 - Services that your agency provides

Network with Local Social Security Office

- You want to establish a good relationship with local Social Security offices. Ways to do this are:
 - Get to know local managers and staff
 - Do in-service trainings for local field office staff
 - Give staff your marketing brochures to add to their list of providers in the area
 - Share your accomplishments and success stories.

Network with Service Providers

- Do all service providers (who are not ENs) in your area know what your Ticket program does?
- Offer to be a guest-speaker at in-service events.
- Make sure they know you can co-enroll participants who may be completing training or receiving other services from them.
- Network with your local State Vocational Rehabilitation (VR) agency to establish a Partnership Plus arrangement for long-term job retention and follow-along services.

Work Incentives Planning and Assistance

- Get to know your local Work Incentives Planning and Assistance (WIPA) agency.
 - Call them, introduce yourself, invite them to visit your office or ask to visit theirs.
 - Collaborate on outreach events such as job fairs.
 - Refer consumers to them as needed for more in-depth Work Incentive planning.
 - Let them know you're actively taking Tickets and what services you provide.

Peer-to-Peer Support

- Network with other service providers to gain:
 - Indispensable resources and support
 - Learn effective business practices
 - Mentorship
 - Path to coordination and collaboration

- Start by:
 - Researching ENs with similar services on the EN Directory
 - Becoming familiar with the National Employment Network Association at nenaticket.com.

Questions and Answers

For more information, contact an Account Specialist

1.866.949.3687

Or email:

enoperations@yourtickettowork.com

