Traditional Employment Network (EN) Site Visit Questionnaire

Part I: General Information

A) EN Information

{Interviewer(s) Instructions: Prefill Prior to Site Visit}

EN Name			
EN Address			
Home Office	◯ Yes ◯ No		
EN Phone			
EN Provider Identification (PID)			
Agreement Number			
Original EN Award Date			
Current Award End Date			
Related EN(s)	1	2	3
Related EN(s) PID	1	2	3
Signatory Authority			
Ticketholder Contact			
Suitability Contact			
Payments Contact			
Ticket Portal Users			
Other Contacts			

B) Interview Participant Details

Date of Interview:	
Social Security Administration (SSA) Interviewer(s)	
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Ticket Program Manager (TPM) Interviewer(s)	
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
EN Interviewee(s)	
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**
Name:	**Position:**

Part II: Traditional EN Interview

A) Physical Accessibility of EN Location

{Interviewer(s) Instructions: Take note of the following. These are not questions for the EN.}

	Yes	No	N/A
1. Is the building accessible for persons with disabilities?	◯	◯	◯
2. Are there accessible parking spaces?	◯	◯	◯
3. Are there ramps at the entrance?	◯	◯	◯
4. Is the bathroom accessible for persons with disabilities?	◯	◯	◯
5. Did interviewer(s) see the accessibility features?	◯	◯	◯

B) Contract Administration

1. How many EN employees work on the Ticket to Work agreement? ☐
2. How many EN employees work with Ticketholders? ☐
3. What is the EN staff to Ticketholder ratio?

   ☐ EN Staff to ☐ Ticketholders

4. Have you notified SSA of all EN staffing changes since your award date ?

   ◯ Yes ◯ No

5. Are all your EN main points of contact current, according to our list?

   ◯ Yes ◯ No

   {Interviewer(s) I***nstructions: First, Show EN the list of main points of contact. If the EN answered No, instruct the EN to complete Form 1374: Ticket Program Agreement (TPA) Change Form (link: https://yourtickettowork.ssa.gov/resources/forms) and email it to ENService@ssa.gov within 3 business days}***

C) Intake and Referrals:

1. Does your EN use a screening process to determine which Ticketholders to work with?

   ◯ Yes ◯ No ◯ Sometimes

{Interviewer(s) Instructions: If yes, collect a copy of the EN's documented screening process}

2. Does your EN refer to Ticketholders to other organizations?

   ◯ Yes ◯ No ◯ Sometimes

   a. If yes or sometimes, to which organizations do you refer Ticketholders?

      ☐ Other EN

      ☐ Vocational Rehabilitation Agency (VR)

      ☐ Work Incentives Planning and Assistance (WIPA)

      ☐ Other Organizations:

   b. If yes or sometimes, under what circumstances does your EN refer Ticketholders to these organizations?

      ☐ Distance

      ☐ Training or education

      ☐ WIPA/Benefits Counseling

      ☐ Other Organizations: ☐

3. Does your EN have a written Partnership Plus agreement with a Vocational Rehabilitation Agency?

   ◯ Yes ◯ No

D) Individual Work Plan (IWP)

1. By which mode(s) of communication does your EN prepare Ticketholder IWPs?

   ◯ In person ◯ Telephone ◯ Virtual

   a. If by telephone or virtual, how does the EN obtain signatures?

   ◯ Electronic ◯ Fax ◯ Mail ◯ Other: _____

2. When completing the IWP, what work-related topics does your EN discuss with the Ticketholder?

   ☐ Benefits Counseling
   ☐ Career Advancement
   ☐ Career Planning
   ☐ Job Placement
   ☐ Job Accommodations
   ☐ Job Coaching
   ☐ Job Development
   ☐ Job Stabilization/Retention
   ☐ Training
   ☐ Other: _____

3. How does your EN describe the purpose of the Ticket to Work program to Ticketholders?

- ☐ Becoming financially independent
- ☐ Explore work
- ☐ Reduce dependency on cash benefits
- ☐ Provide job skills to Ticketholder, but not get back to work
- ☐ Support career development and employment
- ☐ Does not describe purpose
- ☐ Does not know
- ☐ Other: _____

4. When completing the IWP with Ticketholders, does your EN explain the benefits and risks of work and earnings?

◯ Yes ◯ No

a. If yes, how?

_____

5. Does your EN explain Timely Progress Reviews (TPR) to Ticketholders?

◯ Yes ◯ No

a. If yes, how?

_____

6. When completing the IWP, does your EN discuss the Ticketholders' responsibilities as a part of your agreement to work together?

   ◯ Yes ◯ No

   a. If yes, what are the Ticketholders' responsibilities?

   [ ]

{Interviewer(s) Instructions: Inform EN they must explain to the Ticketholder that failure to maintain contact will result in their Ticket being unassigned}

7. What quality assurance procedures does your EN use to ensure IWPs are compliant prior to Ticket assignment?

   [ ]

8. At your EN, who signs the IWP?

   Interviewer:

   ◯ Counselor

   ◯ Program Contact

   ◯ Signatory Authority

   ◯ Ticketholder Contact

   ◯ Other: [ ]

   Not interviewer:

   ◯ Counselor

   ◯ Program Contact

   ◯ Signatory Authority

   ◯ Ticketholder Contact

   ◯ Other: [ ]

{Interviewer(s) Instructions: Remind the EN that only the interviewer who completed the IWP with the Ticketholder can sign it}

9. How often does your EN review the IWP to ensure the goals and services/supports are still accurate?

◯ Weekly ◯ Yearly

◯ Monthly ◯ Never

◯ Quarterly ◯ Other: _____

10. Does your EN update IWPs?

◯ Yes ◯ No ◯ Sometimes

a. If yes, under what circumstances does your EN update the IWP?

☐ Goal Changes

☐ Employment Changes

☐ Scheduled Timeframe (e.g., yearly)

☐ Service and Supports Changes

☐ Other: _____

b. If no, how does your EN track that the Ticketholder continues to meet their goals and doesn't need any additional services and support?

☐ N/A – answered yes to question 10

☐ Call Log

☐ Case Notes

☐ IWP Addendum

☐ Other: _____

E) Communication

1. What methods does your EN use to communicate with Ticketholders?

- ☐ Email
- ☐ In-person
- ☐ Mail
- ☐ Telephone
- ☐ Virtual (e.g., Zoom, Teams)
- ☐ Other: _____

2. How often does your EN contact Ticketholders during the initial job acquisition phase?

- ◯ Weekly
- ◯ Monthly
- ◯ Quarterly
- ◯ Yearly
- ◯ Never
- ◯ Other: _____

{Interviewer(s) Instructions: If EN answered less frequently than monthly remind EN of Ticketholder contact requirements}

3. How often does your EN contact Ticketholders during the ongoing employment support phase?

- ◯ Weekly
- ◯ Monthly
- ◯ Quarterly
- ◯ Yearly
- ◯ Never
- ◯ Other:

{Interviewer(s) Instructions: If EN answered less frequently than quarterly remind EN of Ticketholder contact requirements}

4. What personalized methods does your EN use to communicate with Ticketholders?

   ☐ Email

   ☐ In-person

   ☐ Telephone

   ☐ Virtual (e.g., Zoom, Teams)

   ☐ Does Not Individualize Communication

   ☐ Other: _____

5. Does your EN's telephone line have voicemail?

   ◯ Yes ◯ No

6. How long does it usually take your EN to return telephone calls or emails from assigned Ticketholders?

   ◯ Less than 24 hours

   ◯ 24–48 hours

   ◯ More than 48 hours

7. What type(s) of communication does your EN send to large groups of Ticketholders or prospective Ticket-assigned clients?

F) Tracking and Reporting

1. How does your EN manage and track initial and follow-up communications to Ticketholders?

   - ☐ Call Log
   - ☐ Case Management Software
   - ☐ Case Notes (e.g., narrative documentation like Word)
   - ☐ Spreadsheet (e.g., Excel)
   - ☐ Does Not Manage and Track Communication
   - ☐ Other: _____

2. How does your EN track Ticketholder progress?

   - ☐ Case Management Software
   - ☐ Case Notes (narrative documentation)
   - ☐ Milestone/Outcome Payment Logs
   - ☐ Spreadsheet (e.g., Excel)
   - ☐ Wage Verification documentation
   - ☐ Other: _____

3. Does your EN have any assigned Ticketholders that are unreachable after several attempts?

   ◯ Yes ◯ No

   a. If yes, what percentage of Ticketholders are unreachable?

   ◯ Less than 10% ◯ 10–25%

   ◯ 26–50% ◯ More than 50%

b. If yes, what does your EN do when they can't get in contact with Ticketholders?

- ☐ Reach Out to Alternate Contact
- ☐ Unassign Ticket(s)
- ☐ Nothing
- ☐ Other:

{Interviewer(s) Instructions: Remind EN about mandatory contact guidance}

4. How does your EN advise Ticketholders to report wages?

- ☐ Advise Ticketholder to sign SSA-8240 Authorization Form
- ☐ Report wages to SSA Field Office (SSI & SSDI)
- ☐ Report wages via mySocialSecurity account (SSI & SSDI)
- ☐ Report wages via SSA Mobile Wage Reporting App (SSI only)
- ☐ Report wages via Telephone Wage Reporting (SSI only)
- ☐ Report to EN (for EN to report to SSA - this is incorrect advice)
- ☐ Report to EN (for EN to receive payments)
- ☐ EN does not discuss wage reporting
- ☐ EN provides other incorrect wage reporting advice
- ☐ Other: ____

5. Does your EN report Ticketholder earnings?

◯ Yes ◯ No ◯ Sometimes

a. If yes or sometimes, where does your EN report ?

◯ EN Portal ◯ Fax ◯ Field Office

{Interviewer(s) Instructions: Remind EN that the EN should no longer report wages to the FO, hand out Reporting Wages Guidance}

G) Service Delivery

1. What type of pre-employment services does your EN provide?

- ☐ Benefits counseling:
  - ☐ EN staff provides benefits counseling
  - ☐ EN arranges for benefits counseling through agreement(s) (not WIPA)
- ☐ Career Planning:
  - ☐ Evaluate personal strengths and aptitudes
  - ☐ Evaluate transferable skills based on previous employment or education
  - ☐ Explore Vocational Interests
  - ☐ Goal Setting (short-term and long-term)
  - ☐ Other: _____
- ☐ Job Placement:
  - ☐ Employer outreach
  - ☐ EN provides employment
  - ☐ Identify job leads
  - ☐ Direct placement through established employer partnership (list partners)
  - ☐ Other: _____
- ☐ Job Preparation:
  - ☐ Assistance obtaining required job documentation
  - ☐ Mock interview
  - ☐ Professional Skills Development (e.g., communication, punctuality, and etiquette)
  - ☐ Provide Professional Attire
  - ☐ Resume development and writing
  - ☐ Other: _____

☐ Training:

- ☐ Computer
- ☐ Trade Skills (specific to a job)
- ☐ Workshops
- ☐ Other:

☐ N/A Ticketholder(s) employed prior to working with EN

☐ Other: _____

2. The following three questions focus on your EN's approach to delivering pre-employment services:

   a. Where are these services provided?

   ◯ Onsite ◯ Offsite:

   b. Who provides these services?

   ◯ Provided by EN ◯ Contracted out

   c. What is the cost of these services to the Ticketholder?

   ◯ Free to Ticketholder ◯ Not Free to Ticketholders

3. What types of post-employment services does your EN provide?

   ☐ Career Advancement Counseling

   - ☐ Goal Exploration and Setting
   - ☐ Job Application and Interview Support
   - ☐ Resume development and writing
   - ☐ Other: _____

- ☐ Job Accommodation(s):
  - ☐ Assistive Technology Referral
  - ☐ Documentation Support for Accommodation(s)
  - ☐ Facilitate Telework Accommodation(s) with Employer
  - ☐ Provide Assistive Technology
  - ☐ Other:
- ☐ Job Coaching:
  - ☐ Communication Skills Assistance
  - ☐ On-Site Job Coaching
  - ☐ Time-Management Assistance
  - ☐ Virtual Job Coaching
  - ☐ Other:
- ☐ Job stability and retention:
  - ☐ Conflict Resolution Support
  - ☐ Provide Professional Attire
  - ☐ Regularly scheduled follow-ups
  - ☐ Transportation Barrier Help
  - ☐ Training
  - ☐ Other:
- ☐ Does not provide post-employment services
- ☐ Other: [ ]

4. Does your EN provide payments or reimbursements to Ticketholders, or pay for goods and services for Ticketholders?

   ◯ Yes ◯ No (If no, skip the remainder of this section)

a. If yes, under what circumstances does your EN provide payments or reimbursements to Ticketholders, or pay for goods/services for Ticketholders?

b. If yes, what is the dollar amount of payments made to Ticketholders?

{Interviewer(s) Instructions: Do NOT read list aloud - select all that

- ◯ $1 - $60
- ◯ $61- $100
- ◯ Other:

{Interviewer(s) Instructions: Remind EN - Per the TPA, ENs may (1) provide cash payments totaling no more than $60 per calendar quarter for Title XVI recipients and concurrent beneficiaries and $150 for Title II beneficiaries, and (2) purchase items directly related to obtaining or retaining work on an ad hoc and incidental basis, NOT regular or recurring; receipts must be kept}

5. How does your EN resolve employment-related problems or complaints from Ticketholders?
   - ☐ Encourage employment changes
   - ☐ Provide mediation between employers and Ticketholders
   - ☐ Provide professional guidance to Ticketholders
   - ☐ Provide resources to Ticketholders
   - ☐ Talk to employers
   - ☐ Other:

H) Security

1. Are there other locations, in addition to EN primary business address, where employees conduct Ticketholder business (i.e. meet Ticketholders, paperwork)?

   ◯ Yes ◯ No

   a. If yes, where?

   ◯ Home Office ◯ Alternate Business Site ◯ Other: _____

   b. How many total employees work on the Ticket Program from a home office site? _____

2. Please provide us with a list of employees working from a home office site, as requested in the pre-visit instructions.

   {Interviewer(s) Instructions: Obtain list of employees that work from home that the EN was instructed to prepare in the pre-visit instructions}

3. How many total employees work on the Ticket Program an alternate business site?

   a. What measures does your EN take to ensure the location employees conduct Ticketholder Services (i.e. where you meet Ticketholders) or conduct Ticketholder business is secure?

   ☐ Automatic Screen lock on Computer
   ☐ Encrypted Email
   ☐ Locked Storage
   ☐ Password Protected Computer
   ☐ Private Meeting Location with Ticketholder
   ☐ Private Workspace
   ☐ Secure Cloud Hosting Environment
   ☐ VPN
   ☐ Other: _____

4. Does your EN use electronic files?

   ◯ Yes ◯ No ◯ Sometimes

   a. If yes or sometimes, are the electronic files password-protected?

   ◯ Yes ◯ No ◯ Sometimes

5. How often does your EN change passwords? (ENs should change passwords at least every 90 days)

   ◯ Every 30 days or less

   ◯ Every 31 – 60 days

   ◯ Every 61 – 90 days

   ◯ After more than 90 days

6. Does your EN use cloud technology to store Ticketholder data?

   ◯ Yes ◯ No ◯ Sometimes

   a. If yes, what is the name of the cloud service provider?

7. Does your EN use paper files?

   ◯ Yes ◯ No ◯ Sometimes

   a. If yes or sometimes, where are the paper files kept?

   ☐ Locked Office – locked filing cabinet

   ☐ Locked Office – unlocked filing cabinet

   ☐ Offsite Storage Facility

   ☐ Unlocked Office – locked filing cabinet

   ☐ Unlocked Office – unlocked filing cabinet

   ☐ N/A – answered no to question #7

   ☐ Other:

b. If the EN answered locked office space or locked filing cabinet for question 7a: Who possesses a key to the locked filing office and/or locked filing cabinet?

- ☐ Payments Contact
- ☐ Program Contact
- ☐ Signatory Authority
- ☐ Suitability Contact
- ☐ Ticketholder Contact
- ☐ Ticket Portal User
- ☐ N/A – answered no to question #7
- ☐ Other:

c. If answered offsite storage facility in question 7a, where is the storage facility?

- ☐ Secured home
- ☐ Unsecured home
- ☐ Private location within public space
- ☐ Unsecured public space
- ☐ Other: ____

d. If answered offsite storage facility question 6a, who has access to the storage facility?

- ☐ Payments Contact
- ☐ Program Contact
- ☐ Signatory Authority
- ☐ Suitability Contact
- ☐ Ticketholder Contact
- ☐ Ticket Portal User
- ☐ Other: ____

e. If EN answered other in 7b or 7d, does he/she have suitability clearance?

- ◯ Yes ◯ No

8. How long after a Ticket is unassigned are the Ticketholder records destroyed?

   ◯ 3 years ◯ 7 years ◯ Never ◯ Other timeframe: ☐

9. How do you destroy Ticket to Work records?

   ☐ Burn ☐ Shred ☐ Trash Can ☐ Delete ☐ Other: ☐

10. Does your EN use any software programs to monitor and track Ticketholder work progress?

    ◯ Yes ◯ No

    a. If yes, what security controls and safeguards are in place to protect Ticketholder data within the software program?

    ☐ Account lockout after failed login attempts

    ☐ Audit Logs

    ☐ Automatic Session Timeouts

    ☐ Encryption of Data in at Rest or in Transit

    ☐ Multi-Factor Authentication

    ☐ Remote Work Security Requirements

    ☐ Role-based access permission

    ☐ Secure Cloud Hosting Environment

    ☐ Secure Office Environment for System Access

    ☐ Unique User IDs

    ☐ Other: ☐

11. Do all employees who have access to Ticketholder PII, including passwords, paper files and electronic files have suitability clearance?

    ◯ Yes ◯ No

{Interviewer(s) Instructions: if no - advise the EN:

(1) The EN must immediately restrict PII access from non-suitable individuals until they obtain a favorable suitability determination, and

(2) The non-suitable individual(s) must apply for suitability clearance within 3 business days}

12. Have all employees who work on the Ticket program completed the annual security training, form SSA-222?

◯ Yes ◯ No

{Interviewer(s) Instructions: if no - advise that the EN (a) they must have the individual(s), complete the SSA-222 within 3 business days}

I) Marketing and Networking

1. Does your EN market to prospective Ticketholders for potential Ticket assignment?

◯ Yes ◯ No

a. If yes, what methodologies does your EN use to market?

- ☐ Community network
- ☐ EN Marketing File
- ☐ Flyers/cards/posters
- ☐ Job fairs
- ☐ Social Media
- ☐ Staff on the street
- ☐ N/A answered no to question 1
- ☐ Other: _____

b. If yes, which approach do you find most effective?

- ☐ Community network
- ☐ Flyers/cards/posters
- ☐ Job fairs
- ☐ Social Media
- ☐ Staff on the street
- ☐ N/A answered no to question 1
- ☐ Other: _____

2. Are any employees a member of employment support professional or trade organizations?

- ☐ Association of People Supporting Employment First (APSE)
- ☐ National Association of Benefits and Work Incentives Specialists (NABWIS)
- ☐ National Disability Institute (NDI)
- ☐ National Employment Network Association (NENA)
- ☐ National Reentry Workforce Collaborative (NRWC)
- ☐ National Rehabilitation Association (NRA)
- ☐ Other: [ ]

J. EN Training

1. Have any EN staff completed work incentives/benefits counseling training?

◯ Yes ◯ No

a. If yes, where did they receive certification from?

- ☐ Cornell University
- ☐ Indiana University
- ☐ Virginia Commonwealth University (VCU) community partner's training
- ☐ Other: [ ]

b. If yes, which staff members?

[ ]

c. If yes, does SSA have a copy of the certification(s) from all certified benefits counselors?

◯ Yes ◯ No

3. Have all personnel designated to serve as main points of contact and portal users completed the mandatory Service Provider Foundations Training?

   ◯ Yes ◯ No

4. Who provides employees with training on Ticket to Work policies and procedures?

   ☐ Resources and Training developed by EN

   ☐ TPM provided training and resources

   ☐ Other: _____

5. Does anyone at your EN participate in refresher training (e.g., All EN Calls, TPM provided training, etc.)?

   ◯ Yes ◯ No ◯ Sometimes

   a. If yes, who usually participates in refresher training sessions?

      ☐ Counselors

      ☐ Payments Contact

      ☐ Program Contact

      ☐ Signatory Authority

      ☐ Suitability Contact

      ☐ Ticketholder Contact

      ☐ Ticket Portal User(s)

      ☐ Other: _____

{Interviewer(s) Instructions: Remind EN that if they miss any EN calls, transcripts are available at YourTickettoWork.ssa.gov}

6. Does your EN have written policies and procedures for monitoring, reviewing, and coordinating Ticket activities?

   ◯ Yes ◯ No

{Interviewer(s) Instructions: If yes, request a copy of the written policies and procedures}

   a. If yes, are the policies and procedures accessible to all Ticket staff?

      ◯ Yes ◯ No

   b. If yes, in what format does staff access the policies and procedures?

      ◯ Electronic ◯ Hard copy ◯ Other

   c. If not, is there a reason it is not accessible to all staff?

7. Does your EN read the Ticket program GovDelivery email announcements?

   ◯ Yes ◯ No ◯ Sometimes ◯ Does Not Receive

{Interviewer(s) Instructions: If does not receive or wants someone added – have EN send message to ENService@ssa.gov}

8. How does your EN disseminate the information from GovDelivery email announcements, All EN calls, and TPM provided training to ensure that all EN staff are apprised of all SSA Ticket policies, updates and requirements?

   ☐ Email Summary
   ☐ Electronic Memo
   ☐ One-on-One Discussion(s)
   ☐ Post in a Shared Drive
   ☐ Printed Memos
   ☐ Team Meeting or Staff Briefing
   ☐ Training Session
   ☐ Update Handbook
   ☐ Other:

9. Do any Ticket employees at your EN need training?

   Yes No

   a. If yes, which of the following training sessions are desired?

{Interviewer(s) Instructions: Inform EN they can visit yourtickettowork.ssa.gov for more information on the training sessions}

- ☐ Completing the Suitability Process
- ☐ EN Marketing Strategies Part 1:
- ☐ EN Marketing Strategies Part 2
- ☐ Introduction to Section 503 for ENs
- ☐ Marketing Strategies to Promote your EN
- ☐ Overview of the Ticket to Work Program
- ☐ Partnership Plus Collaboration
- ☐ Payment Process Overview
- ☐ Preparing an Individual Work Plan (IWP)
- ☐ Properly Safeguarding PII
- ☐ Research and Planning
- ☐ Services and Supports Review
- ☐ Ticketholder Intake Process
- ☐ Timely Progress Review (TPR) Process
- ☐ Other:

J) Program Assessment

1. Do you have any recommendations for improving the effectiveness of the Ticket to Work program for Ticketholders?

   ◯ Yes ◯ No

   a. If yes, please explain

.

2. Do you have any additional feedback, suggestions, or recommendations you would like to share with SSA or TPM?

3. Additional notes from interviewer:

Part III: Traditional EN Employee Interview

{Interviewer(s) Instructions: (1) Exclude section if sole proprietor (2) This section is only for the EN Employee and is done in a private setting, without supervision from EN Signatory Authority or other management}

A) Employee Information

1. Employee Name: _____
2. Employee Position: _____
3. What is your background (i.e., employment and education)?

- ☐ Benefits Counseling
- ☐ College or Graduate Degree - Not Social Science
- ☐ College or Graduate Degree – Social Science
- ☐ Employment services
- ☐ Human resources
- ☐ Social work:
- ☐ Other: _____

4. Are you a member of professional or trade organizations related the Ticket to Work Program?

   - ☐ Association of People Supporting Employment First (APSE)
   - ☐ National Association of Benefits and Work Incentives Specialists (NABWIS)
   - ☐ National Disability Institute (NDI)
   - ☐ National Employment Network Association (NENA)
   - ☐ National Reentry Workforce Collaborative (NRWC)
   - ☐ National Rehabilitation Association (NRA)
   - ☐ Other: _____

B) Intake and Referrals

1. Do you use a screening process to determine which Ticketholders to work with?

   ◯ Yes ◯ No ◯ Sometimes

2. Do you EN refer Ticketholders to other organizations?

   ◯ Yes ◯ No ◯ Sometimes

   a. If yes or sometimes, to whom do you refer?

      - ☐ Other ENs
      - ☐ VRs
      - ☐ WIPAs
      - ☐ Other organizations: _____

b. If yes or sometimes, under what circumstances does your EN refer Ticketholders to other organizations?

- ☐ Distance
- ☐ Training or education
- ☐ WIPA/Benefits Counseling
- ☐ Other: _____

C) IWPs

1. By which mode(s) of communication do you prepare Ticketholder IWPs?

   ◯ In person ◯ Telephone ◯ Virtual

   a. If by telephone or virtual, how does the EN obtain signatures?

   ◯ Electronic ◯ Fax ◯ Mail ◯ Other: _____

2. When completing the IWP, what work-related topics do you discuss with the Ticketholder?

   - ☐ Benefits Counseling
   - ☐ Career Advancement
   - ☐ Career Planning
   - ☐ Job Placement
   - ☐ Job Accommodations
   - ☐ Job Coaching
   - ☐ Job Development
   - ☐ Job Stabilization/Retention
   - ☐ Training
   - ☐ Other: _____

3. How do you describe the purpose of the Ticket to Work program to Ticketholders?

- ☐ Becoming financially independent
- ☐ Explore work
- ☐ Reduce dependency on cash benefits
- ☐ Provide job skills to Ticketholder, but not get back to work
- ☐ Support career development and employment
- ☐ Does not describe purpose
- ☐ Does not know
- ☐ Other:

4. When completing the IWP with Ticketholders, do you explain the benefits and risks of work and earnings?

◯ Yes ◯ No

a. If yes, how?

5. Do you explain Timely Progress Reviews (TPR) to Ticketholders?

◯ Yes ◯ No

a. If yes, how?

6. When completing the IWP, do you discuss the Ticketholders' responsibilities as a part of your agreement to work together?

   ◯ Yes ◯ No

   a. If yes, what are the Ticketholders' responsibilities?

{Interviewer(s) Instructions: Inform employee they must explain to the Ticketholder that failure to maintain contact will result in the Ticket being unassigned}

7. What quality assurance procedures does your EN use to ensure IWPs are compliant prior to Ticket assignment?

8. At your EN, who signs the IWP?

Interviewer:

- ☐ Counselor
- ☐ Program Contact
- ☐ Signatory Authority
- ☐ Ticketholder Contact
- ☐ Other:

Not interviewer:

- ☐ Counselor
- ☐ Program Contact
- ☐ Signatory Authority
- ☐ Ticketholder Contact
- ☐ Other:

{Interviewer(s) Instructions: Remind the EN that only the interviewer who completed the IWP with the Ticketholder can sign it}

9. How often do you review the IWP to ensure the goals and services/supports are still accurate?

- ◯ Weekly
- ◯ Monthly
- ◯ Quarterly
- ◯ Yearly
- ◯ Never
- ◯ Other: _____

10. Does your EN update IWPs?

- ◯ Yes
- ◯ No
- ◯ Sometimes

a. If yes, under what circumstances does your EN update the IWP?

- ☐ Goal Changes
- ☐ Employment Changes
- ☐ Scheduled Timeframe (e.g., yearly)
- ☐ Service and Supports Changes
- ☐ Other: _____

b. If no, how do you track that the Ticketholder continues to meet their goals and doesn't need any additional services and support?

- ☐ N/A – answered yes to question 10
- ☐ Call Log
- ☐ Case Notes
- ☐ IWP Addendum
- ☐ Other: _____

D) Communication

1. What methods do you use to communicate with Ticketholders?

☐ Email	☐ Telephone
☐ In-person	☐ Virtual (e.g., Zoom, Teams)
☐ Mail	☐ Other: _____

2. How often do you contact Ticketholders during the initial job acquisition phase?

☐ Weekly	☐ Yearly
☐ Monthly	☐ Never
☐ Quarterly	☐ Other: _____

{Interviewer(s) Instructions: If Employee answered less frequently than monthly remind them of Ticketholder contact requirements}

3. How often do you contact Ticketholders during the ongoing employment support phase?

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Yearly
- ☐ Never
- ☐ Other: _____

{Interviewer(s) Instructions: If employee answered less frequently than quarterly remind them of Ticketholder contact requirements}

4. What personalized methods do you use to communicate with Ticketholders?

- ☐ Email
- ☐ In-person
- ☐ Telephone
- ☐ Virtual (e.g., Zoom, Teams)
- ☐ Does Not Individualize Communication
- ☐ Other: _____

5. How long does it usually take you to return telephone calls or emails from assigned Ticketholders?

- ◯ Less than 24 hours
- ◯ 24–48 hours
- ◯ More than 48 hours

E) Tracking and Reporting

1. How do you manage and track communications to Ticketholders?

- ☐ Call Log
- ☐ Case Management Software
- ☐ Case Notes (e.g., narrative documentation like Word)
- ☐ Spreadsheet (e.g., Excel)
- ☐ Does Not Manage and Track Communication
- ☐ Other: [ ]

2. How do you track Ticketholder progress?

- ☐ Case Management Software
- ☐ Case Notes (narrative documentation)
- ☐ Milestone/Outcome Payment Logs
- ☐ Spreadsheet (e.g., Excel)
- ☐ Wage Verification documentation
- ☐ Other: [ ]

3. Do you have any assigned Ticketholders in your caseload that you are unable to reach after several attempts by different communication methods (e.g. phone, email)?

◯ Yes ◯ No

a. If yes, what percentage of Ticketholders are unreachable by any communication method?

- ◯ Less than 10%
- ◯ 10–25%
- ◯ 26–50%
- ◯ More than 50%

b. If yes, what do you do when you can't get in contact with Ticketholders

- ◯ Reach Out to Alternate Contact
- ◯ Unassign Ticket(s)
- ◯ Nothing
- ◯ Other:

{Interviewer(s) Instructions: Remind employee about mandatory contact guidance}

4. How do you advise Ticketholders to report wages?

- ☐ Advise to sign SSA-8240 Authorization Form
- ☐ Report wages to SSA Field Office (SSI & SSDI)
- ☐ Report wages via mySocialSecurity account (SSI & SSDI)
- ☐ Report wages via SSA Mobile Wage Reporting App (SSI only)
- ☐ Report wages via Telephone Wage Reporting (SSI only)
- ☐ Report to EN (for EN to report to SSA - this is incorrect advice)
- ☐ Report to EN (for EN to receive payments)
- ☐ EN does not discuss wage reporting
- ☐ EN provides other incorrect wage reporting advice
- ☐ Other: ☐

5. Do you report Ticketholder earnings?

◯ Yes ◯ No ◯ Sometimes

a. If yes or sometimes, where does your employee report ?

◯ EN Portal ◯ Fax ◯ Field Office

F) Service Delivery

1. What type of pre-employment services do you provide?

☐ Benefits counseling:

- ☐ EN staff provides benefits counseling
- ☐ EN arranges for benefits counseling through agreement(s) (not WIPA)

☐ Career Planning:

- ☐ Evaluate personal strengths and aptitudes
- ☐ Evaluate transferable skills based on previous employment or education
- ☐ Explore Vocational Interests
- ☐ Goal Setting (short-term and long-term)
- ☐ Other: _____

☐ Job Placement:

- ☐ Employer outreach
- ☐ EN Provides Employment
- ☐ Identify Job leads
- ☐ Direct placement through established employer partnership (list partners)
- ☐ Other: _____

☐ Job Preparation:

- ☐ Assistance obtaining required job documentation
- ☐ Mock interview
- ☐ Professional Skills Development (e.g., communication, punctuality, and etiquette)
- ☐ Provide Professional Attire
- ☐ Resume development and writing
- ☐ Other: _____

☐ Training:

- ☐ Computer
- ☐ Trade Skills (specific to a job)
- ☐ Workshops
- ☐ Other:
- ☐ N/A Ticketholder(s) employed prior to working with EN
- ☐ Other: _____

2. The following three questions focus on your EN's approach to delivering pre-employment services:

a. Where are these services provided?

○ Onsite ○ Offsite: _____

b. Who provides these services?

○ Provided by EN ○ Contracted out

c. What is the cost of these services to the Ticketholder?

○ Free to Ticketholder ○ Not Free to Ticketholders

3. What types of post-employment services do you provide?

- ☐ Career Advancement Counseling
  - ☐ Goal Exploration and Setting
  - ☐ Job Application and Interview Support
  - ☐ Resume development and writing
  - ☐ Other: _____
- ☐ Job Accommodation(s):
  - ☐ Assistive Technology Referral
  - ☐ Documentation Support for Accommodation(s)
  - ☐ Facilitate Telework
  - ☐ Accommodation(s) with Employer
  - ☐ Provide Assistive Technology
  - ☐ Other: _____
- ☐ Job Coaching:
  - ☐ Communication Skills
  - ☐ Assistance On-Site
  - ☐ Job Coaching
  - ☐ Time-Management Assistance
  - ☐ Virtual Job Coaching
  - ☐ Other: _____
- ☐ Job stability and retention:
  - ☐ Conflict Resolution Support
  - ☐ Provide Professional Attire
  - ☐ Regularly scheduled follow-ups
  - ☐ Transportation Barrier Help
  - ☐ Training
  - ☐ Other: _____

4. How do you resolve employment-related problems or complaints from Ticketholders?

- ☐ Encourage employment changes
- ☐ Provide mediation between employers and Ticketholders
- ☐ Provide professional guidance to Ticketholders
- ☐ Provide resources to Ticketholders
- ☐ Other: _____

G) Security

1. What location do you conduct business from (i.e. where you meet Ticketholders or do paperwork)?

◯ Home Office ◯ Alternate Business Site ◯ Other: _____

2. If Home Office, what measures are taken to ensure the home office is secure?

- ☐ Automatic Screen lock on Computer
- ☐ Encrypted Email
- ☐ Locked Storage
- ☐ Password Protected Computer
- ☐ Private Meeting Location with Ticketholder
- ☐ Private Workspace
- ☐ Secure Cloud Hosting Environment
- ☐ VPN
- ☐ Other: _____

3. Do you use electronic files?

◯ Yes ◯ No ◯ Sometimes

a. If yes or sometimes, are the electronic files password-protected?

◯ Yes ◯ No ◯ Sometimes

4. How often do you change passwords? (ENs should change passwords at least every 90 days)

◯ Every 30 days or less

◯ Every 31 – 60 days

◯ Every 61 – 90 days

◯ After more than 90 days

5. Do you use cloud technology to store Ticketholder data?

◯ Yes ◯ No ◯ Sometimes

a. If yes, what is (are) the name(s) of the cloud service provider(s)?

6. Do you use paper files?

◯ Yes ◯ No ◯ Sometimes

a. If yes or sometimes, where are the paper files kept?

☐ Locked Office – locked filing cabinet

☐ Locked Office – unlocked filing cabinet

☐ Offsite Storage Facility

☐ Unlocked Office – locked filing cabinet

☐ Unlocked Office – unlocked filing cabinet

☐ Other: _____

b. If answered in locked office space or locked filing cabinet for question 6a: Who possesses a key to the filing locked office and/or locked filing cabinet?

- ☐ Payments Contact
- ☐ Program Contact
- ☐ Signatory Authority
- ☐ Suitability Contact
- ☐ Ticketholder Contact
- ☐ Ticket Portal User
- ☐ Other: _____

c. If answered offsite storage facility in question 6a, where is the storage facility?

- ☐ Secured home
- ☐ Unsecured home
- ☐ Private location within public space
- ☐ Unsecured public space
- ☐ Other: _____

d. If answered offsite storage facility question 6a, who has access to the storage facility?

- ☐ Payments Contact
- ☐ Program Contact
- ☐ Signatory Authority
- ☐ Suitability Contact
- ☐ Ticketholder Contact
- ☐ Ticket Portal User
- ☐ Other: _____

7. Do you use any software programs to monitor and track Ticketholder work progress?

   ◯ Yes ◯ No

   a. If yes, what security controls and safeguards are in place to protect Ticketholder data within the software program?

   ☐ Account lockout after failed login attempts

   ☐ Audit Logs

   ☐ Automatic Session Timeouts

   ☐ Encryption of Data in at Rest or in Transit

   ☐ Multi-Factor Authentication

   ☐ Remote Work Security Requirements

   ☐ Role-based access permission

   ☐ Secure Cloud Hosting Environment

   ☐ Secure Office Environment for System Access

   ☐ Unique User IDs

   ☐ Other:

H) EN Training

1. Have you completed work incentives/benefits counseling training?

   ◯ Yes ◯ No

   a. If yes, where did you receive certification from?

      ◯ Cornell University

      ◯ Indiana University

      ◯ Virginia Commonwealth University (VCU) community partner's training

      ◯ Other: _____

   b. If yes, does SSA have a copy of your certification?

      ◯ Yes ◯ No

5. Have you completed Service Provider Foundations Training from TPM?

   ◯ Yes ◯ No

6. Who provides employees with training on Ticket to Work policies and procedures?

   ☐ EN ☐ TPM ☐ Other: _____

7. Do you participate in refresher training (e.g., All EN Calls, TPM provided training, etc.)?

   ◯ Yes ◯ No ◯ Sometimes

8. Do you need/want additional or refresher training?

   ◯ Yes ◯ No

a. If yes, which of the following training sessions are desired:

{Interviewer(s) Instructions: Inform EN Employee they can visit yourtickettowork.ssa.gov for more information on the training sessions}

- ☐ Completing the Suitability Process
- ☐ Overview of the Ticket to Work Program
- ☐ Properly Safeguarding PII
- ☐ Timely Progress Review (TPR) Process
- ☐ Ticketholder Intake Process
- ☐ Preparing an Individual Work Plan (IWP)
- ☐ Services and Supports Review
- ☐ Payment Process Overview
- ☐ Partnership Plus Collaboration
- ☐ EN Marketing Strategies Part 1: Research and Planning
- ☐ EN Marketing Strategies Part 2: Marketing Strategies to Promote your EN
- ☐ Introduction to Section 503 for ENs
- ☐ Other: _____

9. Does your EN have written policies and procedures for monitoring, reviewing, and coordinating Ticket activities?

   ◯ Yes ◯ No

   a. If yes, are the policies and procedures accessible to you?

      ◯ Yes ◯ No

   b. If yes, in what format do you access the policies and procedures?

      ☐ Electronic ☐ Hard copy ☐ Other

10. How does your EN disseminate the information from GovDelivery email announcements, All EN calls, and TPM provided training to ensure that all EN staff are apprised of all SSA Ticket policies, updates and requirements?

- ☐ Email Summary
- ☐ Electronic Memo
- ☐ One-on-One Discussion(s)
- ☐ Post in a Shared Drive
- ☐ Printed Memos
- ☐ Team Meeting or Staff Briefing
- ☐ Training Session
- ☐ Update Handbook
- ☐ Other: ____

K) Program Assessment

1. Do you have any recommendations for improving the effectiveness of the Ticket to Work program for Ticketholders?

◯ Yes ◯ No

a. If yes, please explain:

2. Do you have any additional feedback, suggestions, or recommendations you would like to share with SSA or TPM?

3. Additional notes from interviewer: