



ETO Data Entry Checklist

Beneficiary Initials: _____

ETO #: _____

ETO Data Entry for Information and Referral Services:

Required Tasks	Date Completed
I&R Program: Add New Beneficiary / Accept Pending Referral / Enroll (previously dismissed) Beneficiary	
I&R Program: Complete I&R Assessment for initial service request	

Guidance: Only enroll beneficiaries who: (1) meet the overall WIPA eligibility criteria, and (2) receive services. When the TtW Help Line Specialist has created an I&R Assessment for a referred beneficiary, no additional I&R Assessment is needed unless a beneficiary presents an I&R need not addressed by the TtW Help Line Specialist. To confirm that the I&R assessment was completed by the TtW Help Line, please follow the instructions in the 'ETO Data Entry Guidance, Tips and Reminders' document.

Additional I&R Assessments		
Date Completed	Date Completed	Date Completed

Guidance: Only complete additional I&R Assessments if: (1) beneficiary stays in I&R Program (doesn't move onto WIPA program), and (2) presents a new I&R need.

ETO Data Entry for WIPA Services:

Required Tasks	Date Completed
I&R Program: Dismiss Beneficiary	
WIPA Program: Enroll Beneficiary	
WIPA Program: Complete WIPA Baseline Assessment	

Guidance: Only enroll beneficiaries who: (1) you offer WIPA level services, (2) who accept WIPA level services, and (3) you provide at least some WIPA level services. The Baseline Assessment is considered complete once all benefits have been verified and all sections have been filled out.

Follow-Up Assessments		
Date Completed	Date Completed	Date Completed

Guidance: After completing the Baseline Assessment, complete a Follow-Up Assessment **whenever the beneficiary has a change in their situation** specifically related to one of the fields on the previously completed assessment.

WIPA Efforts		
Date Completed	Date Completed	Date Completed

Guidance: Every contact, attempted contact, or action with a beneficiary or with another entity on behalf of the beneficiary should be recorded as an effort.

Note: CWICs are encouraged to use the To Do list function in ETO when entering current data into ETO to avoid unnecessary paperwork.