ETO Data Entry
Guidance, Tips, and Reminders

August 2017

Note: Screen reader users should use JAWS "read all" to access labels on screen shots.
ETO Data Entry Guidance, Tips, and Reminders

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INTRODUCTION

The purpose of this document is to provide guidance and tips to assist CWICs in entering data into the ETO system that accurately reflects the services provided to beneficiaries. Functions of the ETO data system include:

- Captures a record of services provided to individual beneficiaries for case management purposes;
- Provides a record of baseline and ongoing changes in beneficiary’s status; an indicator of service impact;
- Acts as a vehicle for beneficiary referrals for WIPA Services from the Ticket to Work Help Line; and,
- Provides data for WIPA managers for quality assurance / program improvements efforts.

Social Security Office of Research, Demonstration and Employment Support (ORDES) is committed to evaluating the overall WIPA program and the performance of each project. In order to do so, ORDES needs accurate and complete information from each project, as captured through the ETO data system to assess and monitor individual project performance. The ultimate goal of this data collection is to document the activities and successes of the WIPA projects and share these results with Social Security and Congress.

The WIPA data collection requirements detailed in the WIPA Terms & Conditions include:

- Collect and report beneficiary information (to include the Social Security Number) required by Social Security for evaluation and statistical purposes only.
- Beneficiary data including Personally Identifiable Information (PII) must be entered into the Social Security approved National WIPA Data Collection System (ETO) and only ETO. Projects are not authorized to maintain beneficiary PII in any other data collection system.

It is critical that all service delivered is entered into the ETO data system consistently, correctly and accurately so that WIPA projects are reflecting the work that they do, as well as meeting the benchmarks established by ORDES. The contents of this document are intended to assist projects in entering data to that end.

The guidance and tips provided in this document address how to enter data correctly to accurately reflect the WIPA services you provide. If you have additional questions about data entry, please contact Laura Coffey, VCU-NTDC Technical Assistance Liaison for ETO and TtW Help Line at ljcoffey@vcu.edu or 502-479-5865. Technical questions should be directed to the ETO Technical Help Desk at support@wipaccess.com or 855-816-0890.
GENERAL

Accessing Programs in ETO

Some of the structure of the ETO program has changed a bit and a few things will look slightly different on the Home Page. After logging into the ETO site, CWICs will see the name of their WIPA site and the default program, which should be ‘WIPA Initial Contact and Demographics’ (I&R program).

Before entering any data, check to confirm that you are in the correct program!

The two programs in ETO include the Initial Contact and Demographics (I&R) program and the WIPA Services program. To switch from the I&R program to WIPA Services, click on ‘WIPA Initial Contact and Demographics’, which should be underlined. A dropdown box will be displayed that includes ‘WIPA Work Incentives Planning and Assistance’. Select ‘WIPA Work Incentives Planning and Assistance’ (WIPA Services program) and the screen will change to the WIPA Services home page.

WIPA Eligibility

Only enter beneficiaries in ETO who meet WIPA eligibility criteria.

It’s important to keep in mind that the intent of the ETO system is to capture and provide Social Security with complete and accurate information on the Information and Referral (I&R) services and WIPA services actually provided to eligible beneficiaries. Therefore, you should never enter an individual in ETO who (1) does not meet the basic WIPA eligibility services and (2) does not receive an actual service from your project.

Beneficiaries who are eligible for WIPA services must meet the following criteria:

- at least age 14, but not yet full retirement age**, 
- disabled per SSA’s definition, and 
- already receiving (or approved to receive) Social Security benefits based on disability (SSI or a title II disability benefit such as SSDI, CDB or DWB). 
- SSI beneficiaries receiving continued Medicaid under 1619(b) of the Social Security Act, 
- SSI beneficiaries receiving only State supplementary payment, and 
- Former beneficiaries of the title II disability programs (SSDI, CDB, DWB) receiving Medicare under the Extended Period of Medicare Coverage

**NOTE: Full Retirement Age, or FRA, varies depending when individuals were born. To identify the FRA for various birth dates, go to POMS RS 00615.003 Full Retirement Age.
A beneficiary was entered into ETO, but is later determined to be ineligible for WIPA services.

Keep in mind that WIPA projects should only enter individuals into the ETO data system once it is determined that the individual meets the basic eligibility criteria for WIPA services. You can avoid entering individuals who are not WIPA eligible by carefully screening the individual before entering in ETO.

In instances in which a beneficiary is entered in ETO and later determined ineligible for services, change their last name to “Fake.” Changing a beneficiary’s last name to “Fake” permanently deletes the beneficiary record from the database. The Technical Help Desk removes all of the “Fake” records during periodic “sweeps”. Records identified as Fake are not counted in your reports.

CWICs should only use the “Fake” function when:

1. After accepting a Ticket to Work Help Line referral:
   - You cannot reach the beneficiary after repeated attempts to contact, following protocol;
   - The beneficiary declines services when contacted; or
   - The beneficiary is not in your project’s service area.
2. A beneficiary – entered into the database – is not in your service area; and/or
3. A beneficiary – entered into the database – is determined ineligible for WIPA services.

WORKING IN THE I&R PROGRAM

Adding a Beneficiary

Who is entered into the I&R Program?

Enter all callers who you determine; (1) eligible to receive services from your WIPA project, and (2) do receive some services from your project. All services provided by a WIPA project begin with delivering Information and Referral services. Since the I&R program in ETO captures the I&R information, all beneficiaries eligible for your services must first be entered in the I&R program.

Identifying Current and Former BOND Beneficiaries

It is critical to check for current and former BOND participants in ETO before ever entering a new beneficiary or accepting a new referral from the Help Line! There is only one search mechanism within the ETO system that will identify both BOND beneficiaries and current WIPA enrollees, so you must follow the exact steps listed below every time.
• Click on the first blue link on the I&R Home Page called “Search for current WIPA and BOND beneficiaries”.
• Enter the beneficiary’s 9-digit Social Security number (SSN) in the search box. Do NOT include dashes or spaces.
• If a matching BOND record is found, it will be shown with Site Name: “ZZ – WIPA BOND”
  o Former BOND participants will have a date displayed in the “End Date” column.
  o Current BOND participants will have a blank field in the “End Date” column.
• NOTE: A matching WIPA record will show your WIPA program’s name in the Site Pull Down column.

<table>
<thead>
<tr>
<th>PARTICIPANT NAME</th>
<th>SSN</th>
<th>PROGRAM START DATE</th>
<th>END DATE</th>
<th>SITE PULL DOWN</th>
</tr>
</thead>
<tbody>
<tr>
<td>ruthie</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>3333333333</td>
<td>11/12/2015</td>
<td>03/01/2016</td>
<td>ZZ – WIPA BOND</td>
</tr>
</tbody>
</table>

Next Steps

Depending on the results returned after completing the search for current WIPA and BOND participation, you will have different actions to take. The results that will display include:

• Former BOND participant
• Current BOND participant
• Current WIPA participant
• No records to display (no WIPA or BOND participation)

Please follow the appropriate action that corresponds to the situation.

**Former BOND participant** – When the search results show that a former BOND participant has an end date, you can move forward to add them in your ETO site.

  o Go back to the Home Page and click on blue link called “Add Beneficiary”
  o Complete all required fields on the demographics page as usual.
  o Hit ‘Save’. You will see a potential match screen just after saving.
  o Click the button ‘Add as New’.
○ Do **NOT** select the matching record that shows as a possible match.

○ After successfully adding the beneficiary, you will go directly to the I&R assessment.
   Complete all required fields on the assessment.

○ Hit ‘Submit’

**Current BOND participant** – These participants will **not** have an end date shown in the results displayed. This means that the beneficiary is still active in BOND and is not eligible for WIPA services. Do **NOT** add the beneficiary as a new participant. Refer current BOND participants to the BOND Call Center for assistance. The BOND Call Center number is 877-726-6309 or 877-726-6390 (TTY).

If you are making a determination on a pending referral from the TtW Help Line and your search indicates that the beneficiary is a current BOND participant, follow the steps indicated below:

○ Reject the referral for reason of “Other”.

○ Send an email to the Help Line at support@choosework.ssa.gov, copy Laura Coffey ljcoffey@vcu.edu and let them know that your reason for rejecting as “Other” was due to the beneficiary being a current BOND participant. The subject line of the email should indicate “referral rejected – other”. Please use the following template for the body of your email:
  “On *(insert referral date)*, *(insert beneficiary first name and last initial)* was referred to *(insert WIPA project name as listed in ETO)* by *(insert referring CSR name)*. We have rejected the referral for reason of ‘other’ because this beneficiary shows as currently active in BOND. Please re-contact the beneficiary and refer them back to the BOND Call Center for assistance. Thank you.”

**Current WIPA participant** – These participants will have your WIPA project name shown in the Site Pull Down column. This means that the beneficiary is already in your WIPA site. Do **NOT** add a new record. The individual may not be active in the I&R program; however, if two lines are displayed, it means there is an I&R record as well as a WIPA record. Continue to provide and document your services appropriately.

If you are checking a pending referral from the TtW Help Line that displays as enrolled in your site, reject the referral as ‘already enrolled’. There is no need to send a separate email to the TtW Help Line; they will receive an automatic rejection email via the ETO system. You will need to contact the beneficiary and continue to provide services and document them accordingly in ETO.
No Records to Display – The beneficiary is not in BOND and is not currently in your WIPA site. Add the beneficiary as new and provide services accordingly. If beneficiary is a pending referral from the Help Line and the search indicates no records, accept the referral and begin attempts to contact.

BOND and duplicate checks:

The ETO system will automatically do a potential duplicate check when ‘adding a participant’ that may have one or more matching demographic fields. Once the new participant is added, a screen, as shown below, may pop up that indicates there may be a potential duplicate in the project site (already enrolled) or in BOND (Benefit Offset National Demonstration)

- If the potential duplicate message appears, be sure to double check the name, and Social Security number. If they do NOT match that of the beneficiary being added, click on the ‘Add as New’ button directly under the name and SSN of the beneficiary just entered.

- If the radio button for the potential matching record is selected and you subsequently hit ‘Continue’, a BOND participant was accidentally enrolled in the site. In this circumstance, change the last name to ‘Fake’ per the established protocols and then enroll the correct new beneficiary. Changing the last name to ‘Fake’ will permanently remove this participant from the WIPA site’s data.

Correcting an enrollment date

It is critical that enrollment dates are entered correctly. The ‘Program Start Date’ field at the bottom of the ‘Add Beneficiary’ page will default to today’s date; when back data is being entered, you MUST change this to the date that you initially enrolled the beneficiary in the I&R program. If you forget to change this particular field, the system will not allow back-dated efforts or assessments to be recorded for the beneficiary. The enrollment date will need to be corrected before you can continue entering your data for this record.
This is an issue for the ETO Technical Help Desk, as it requires Site Administrator access to correct. Please send the Technical Help Desk the following information:

- WIPA project site name (as it appears in ETO)
- ETO case number
- Correct I&R enrollment date

**Entering beneficiaries who are hesitant or unwilling to share their Social Security Number (SSN)**

SSN is a required field. This field may be left blank only for beneficiaries enrolling in the I&R program who are not willing to provide this information. However, if a beneficiary requests I&R assistance, but is not willing to provide their SSN, WIPAs have two options:

- Option 1: Provide the I&R service, and do not enter the beneficiary in ETO, or
- Option 2: Provide the I&R service, and enter the beneficiary in ETO, leaving the SSN field blank.

WIPA Projects will not be penalized for leaving the SSN field blank in the I&R program only.

You are encouraged to speak with your VCU TA Liaison about your current process to determine if there might be some different strategies you can use in discussing this SSN requirement with beneficiaries.

**Efforts in the I&R Program**

**Definition of an Effort**

Efforts (initial case notes) are used to track any activities you complete related to delivering the I&R service (including attempts to contact the beneficiary), as well as any additional I&R contacts you have with, or on behalf of, the beneficiary after that service is complete. The Efforts feature in the I&R program is completely optional, meaning there is no requirement that WIPAs use this feature in the I&R program.

**Recording an Effort**

There are various ways to get to the Effort form (also called a TouchPoint).

From the I&R Home Page:

- Click on the ‘Beneficiary Effort’ link.
- On the next screen, enter the case number or SSN to find the participant, hit ‘Search’.
- Select the appropriate form/action on the next screen. Choices include: Baseline Assessment (WIPA program only), Effort Form (both programs), and Upload (both programs).
NOTE: The beneficiary name will show in green at the top of this page, and is an active link. If you click on the name here, it will take you to the beneficiary dashboard.

- Click ‘Take New TouchPoint’ on the next screen.

Alternately, you can also use any of the following methods to record a TouchPoint:

1. Quick Search for the beneficiary, click on the beneficiary name in the results, select ‘View/Record Touchpoint’, then proceed as above.
2. From the beneficiary dashboard, select the ‘+New’ link in the Recent Efforts or Recent Assessments section.
3. From the beneficiary dashboard, select the ‘Record TouchPoint’ link in the Action Links section.

Completing the Effort form

The Effort form is identical in both the I&R program and the WIPA program. When selecting the type of service you are documenting in an I&R effort, you should only select ‘Intake and Information Gathering’ and/or ‘Problem Solving & Advocacy’. The other types of service options are specific to delivery of individualized WIPA services.

As you complete the remainder of the effort form, remember that you are only documenting the particular activity that you completed with or on behalf of the beneficiary. Only complete the fields that are relevant to the activity performed or service delivered.

Capturing additional efforts for beneficiaries who only receive I&R services

It is absolutely permissible to use I&R Efforts to track additional I&R contacts – but not required. The Efforts feature in the I&R program is completely optional. If you choose to do so, it may be used to track any activities you perform in relation to delivering the I&R service, as well as any additional I&R contacts you have with the beneficiary after the service is complete. Please be aware that the benchmarks related to efforts only apply to beneficiaries enrolled in WIPA services. Any I&R efforts you choose to record will not count towards meeting the benchmarks.

Accessing efforts in the I&R program after the beneficiary is dismissed from I&R and subsequently enrolled in WIPA

All I&R efforts entered are still accessible after a participant has been dismissed from I&R and enrolled in WIPA. Proceed as follows:

- Search for the beneficiary by last name
- Click on ‘View Beneficiary Dashboard’
- At the top left of the dashboard, select ‘All Notes’
- A new window will open and all the efforts recorded in both programs will display in a table.
**Dismissal in the I&R Program**

**Required dismissal from the I&R Program**

“Dismissing” a beneficiary simply means that the case record has been moved to an inactive status for that particular program; all of the beneficiary data remains in the data system.

The only instance in which dismissal from I&R is required is when a beneficiary, enrolled in the I&R program, is referred to and begins receiving WIPA services. When this happens, you must complete all fields listed in the dismissal feature in ETO. Remember, anyone who will be enrolled in the WIPA Services Program MUST first be enrolled, and then dismissed from the I&R Program. Take the following steps to dismiss from I&R:

- Verify that the beneficiary SSN field is completed
- Select ‘Dismiss Beneficiary’ from the I&R home page
- Search for the beneficiary

**ETO™ software**

Select the appropriate beneficiary by checking the box next to the correct record.

Enter the dismissal date*, dismissal reason of ‘Referred to WIPA’, and check the ‘Successfully Completed’ box, then hit ‘dismiss participant’.

*NOTE: the dismissal date field will automatically populate with today’s date – be sure to change it to the appropriate dismissal date if doing back data entry.
Other dismissals from the I&R Program

Other than dismissing beneficiaries who are moving into the WIPA Services program, dismissal from I&R is optional only for two additional reasons. CWICs may choose to dismiss beneficiaries from I&R for reasons such as: moved out of service area, or deceased. Otherwise, beneficiaries should remain active in the I&R program and NOT be dismissed until such time in the future that they are ready to move into WIPA services.

Reactivating a beneficiary that has been previously dismissed

Again, dismissing a beneficiary does not mean they disappear; the beneficiary’s record still remains in the database and is counted. If you inadvertently dismissed someone, you can re-enroll a beneficiary by clicking on the ‘Enroll Beneficiary’ link on the I&R program home page. Search for the beneficiary by first name, last name, SSN, or case number and click ‘Search’

- Select the correct beneficiary
- Enter the new program start date and click ‘Enroll Participant’
Referrals to WIPA Projects from the Ticket to Work Help Line

Accepting and Rejecting Referrals

Viewing Participant and Referral Details

WIPA Projects should not contact the beneficiary prior to taking action on a referral from the TtW Help Line (‘accepting’ or ‘rejecting’ the referral).

The appropriate protocol is; (1) review the beneficiary’s referral information in ETO for appropriateness, (2) ‘accept’ or ‘reject’ the referral in ETO, and (3) after accepting the referral, initiate contact with the beneficiary. Accepting a beneficiary referral from the TtW Help Line automatically enrolls the beneficiary in the I&R program in ETO.

To view the referral details:

- From the home page, select ‘View Pending Referrals’
- Select “a different site within my Enterprise”, and click Submit

![View Pending Referrals](image)

- When the next screen opens up, click on the ‘Referral Details’ link for the referral you are taking action on, and review the referral notes. There will be sufficient information provided to confirm that the beneficiary is within the WIPA coverage area.

![View Pending Referrals](image)

- After closing this screen, you will need to click on the ‘Participant Details’ link to be able to search your site to confirm that you are not already serving the referred individual.
- Select ‘Call Center site’ in the ‘Demographics for...’ box, as indicated below:
• The following is an example of what you will see:

• Copy the SSN and paste it into the search box that displays after clicking on ‘Search for WIPA or BOND beneficiaries’ from the I&R program home page to check for prior enrollment in your program.

• IMPORTANT: After pasting the SSN into the search box, REMOVE the dashes! The SSN should display as only 9 digits, then hit ‘Continue’.

• If the beneficiary is within your service area, and they are not already being served by your project (enrolled in ETO), accept the referral; otherwise, reject.

Handling referrals of beneficiaries already being served by the WIPA

If a referral is received and a search reveals that the referred beneficiary is already enrolled in the WIPA site and has been receiving services, reject the referral with the reason of ‘already enrolled in this WIPA’. After rejecting the referral, contact the beneficiary within 5 business days to provide continued services as needed. CWICs should make note of the information provided by the Help Line in the referral notes section when reviewing referral details as this will indicate the beneficiary’s reason for contact.
If the referral was rejected and the referral notes information was not reviewed/captured, this can be found by running the ‘(WIPA project initials) Call Center Referrals by Date Range’ report described in the ‘Viewing Referral Information’ section below.

Accepting a Referral – Potential Duplicate:

There are instances where you may receive the potential duplicate warning screen when you are accepting a referral. These instance could include:

- A former BOND beneficiary is referred,
- The beneficiary already exists in your WIPA site, or
- The name is similar or the same as another record in your site that may not have a SSN recorded.

In these situations, select the radio button next to ‘Add as New’, and then hit ‘Save’ to accept the referral.

Viewing Referral Information

Locating a participant record after accepting/rejecting the referral

To view Help Line referrals within a specific date range, go to the right navigation bar and select ‘Reports’, then select ‘View Reports NEW’, scroll down to ‘Query Reports’, and select ‘(WIPA project initials) Call Center Referrals by Date Range’

- Enter a date range that includes the date of the original referral. Hit ‘Submit’.

![Duplicate Information](image)
• Scroll through the query results displayed until the appropriate beneficiary record is found. Note the case number or last name of the beneficiary, exit out of the report, and search for the beneficiary from the home page.

Viewing the Referral Notes

To review the referral notes completed by the Help Line for an accepted participant, you can either use the ‘(WIPA project initials) Call Center Referrals by Date Range’ report described above, or you can take the following actions:

• Go to the right navigation bar and select ‘Participant History’, then select ‘Review Participant Efforts (NEW)’

• On the next screen, enter the last name, SSN, or case number of the beneficiary you want to review and hit ‘Go’.

• Select the date range that includes the initial referral date, or if you don’t recall, you can check the box for ‘Check All Dates’, and hit ‘Continue’.

• The next screen will show as below and to view the information about the referral, you MUST change the ‘Scope’ to ‘Enterprise’, then hit ‘Go’

After the screen refreshes, scroll to the Detailed Statistics section and open the + toggle next to Referrals to display the referral to your site.

Open the + toggle next to your site name and all the details about the original referral, including the referral notes will display, as shown below.
TtW Help Line to WIPA Referral Protocols

Addressing Protocol Email Issues

There are times that previously referred beneficiaries re-contact the TtW Help Line for various reasons. In these instances, the agent at the Help Line will send a protocol email to the WIPA that received the initial referral to provide information stated by the beneficiary, as well as to request that the WIPA continue efforts to contact the beneficiary. Please refer to the ‘TtW Help Line to WIPA Referral Protocols’ document and ‘Quick Reference Guide’ posted on the VCU National Training and Data Center website for additional guidance on complete protocols.

When a “re-contact email” is received, limited information related to the beneficiary in question will be provided, so that PII is not disclosed. CWICs will need to search the referrals within a specific date range in order to identify the beneficiary who re-contacted the Help Line. To view Help Line referrals within a specific date range, go to the right navigation bar and select ‘Reports’, then select ‘View Reports NEW’, scroll to the bottom of the page under ‘Query Reports’, and select ‘(WIPA project initials) Call Center Referrals by Date Range’

- Select ‘equal to’ in the drop down box, and the date the referral was made (this was indicated in the email). Hit submit.
• Scroll through the query results displayed until the appropriate beneficiary record is found. Note the case number or last name of the beneficiary, exit out of the report, and search for the beneficiary from the home page.

• Re-contact the beneficiary within the established time frame to continue services.

“Fake” protocol for Help Line referrals

In some instances, beneficiaries referred to the WIPA from the TtW Help Line, may need to be removed from the database. By removing the beneficiary (as opposed to dismissing them from I&R), the beneficiary will not be included in the counts of ‘ever enrolled in I&R’ and thus, there is no issue with increasing your WIPA project’s I&R numbers relative to WIPA service numbers. An increase in the number of beneficiaries removed from the ETO program will also not reflect negatively on your project.

There are only three reasons why a referred beneficiary should be removed from the ETO database:

• The CWIC is unable to contact the beneficiary after multiple attempts within the five to seven business day period.
• After accepting the referral and contacting the beneficiary, the beneficiary declines services.
• The WIPA project may ‘accept’ a referral and then after contacting the beneficiary, discover that the individual resides outside of their service area.

In these instances, WIPAs should take the following actions:

• Remove the beneficiary from the I&R program by locating the accepted referral and changing the beneficiary’s last name to “Fake”.
• Contact the TtW Help Line via email support@choosework.ssa.gov and copy Laura Coffey ljcoffey@vcu.edu to inform them of the situation.

Enrolling Help Line referrals into the WIPA Services Program

As previously noted, accepting a beneficiary referral for the TtW Helpline automatically enrolls the beneficiary in the I&R program in ETO. Remember that Help Line Customer Service Representatives screen beneficiaries with inquiries related to work incentives to determine, among other things, that the beneficiary meets the basic eligibility criteria for WIPA services. Given this, once a referral is accepted, CWICs can enroll Help Line referrals in the WIPA Services Program in ETO as soon as appropriate. Enroll all beneficiaries who: (1) you offer WIPA level services, (2) accept the offer for those services, and (3) you provide at least some individualized WIPA level services. Consider the following questions to ensure that WIPA level services are appropriate:

• Does the beneficiary say that he/she is interested in employment or indicates that he/she plans to pursue employment at some point in the future?
• Does the beneficiary want individualized counseling on how paid employment/self-employment would affect his/her benefits?
• Is the beneficiary willing to give you the information you need to provide individualized and specific services (i.e., provide benefits verification information, sign releases if assistance is needed in obtaining verification, etc.)?

Handling issues with Help Line referrals – different beneficiary address

The TtW Help Line makes referrals to WIPA projects based on the confirmed permanent address (county) for the beneficiary in iTOPSS. In some circumstances, once the referral is accepted and the CWIC begins working with the beneficiary, it comes to light that the beneficiary is actually “staying” in a different WIPA coverage area. This could be due to the person technically being homeless and staying with someone in an area that is different from the permanent mailing address, or, someone had temporarily moved to a different area for work, etc. If this situation occurs, the beneficiary should continue to be served by the WIPA that covers the permanent address of the beneficiary, and who received the original referral. If the beneficiary subsequently moves their permanent address to another area, they should be either directed back to the TtW Help Line or given the contact information for the appropriate WIPA if they want/need additional WIPA services. In this situation an ETO file transfer can be requested with the beneficiary’s permission.

Guidance on File Transfers

Social Security previously provided a fact sheet about requesting beneficiary file transfers. Once you have completed the file transfer request as outlined in the document titled “File Transfer Fact Sheet for Continuing Projects 8-3-15- final”, you will receive the file transfer in the form of a referral in ETO.

Beneficiaries previously served by WIPAs who were either closing, or had changes in service area were provided two options for connecting with their new WIPA provider:

• Call the new WIPA provider directly, or
• Call the TtW Help Line for screening and possible referral.

This document will provide further guidance on handling the ETO file transfer referrals in each instance.

Option #1 - Beneficiary directly contacts the WIPA

When a beneficiary contacts your project and indicates that they had previously received services from another WIPA project, you should follow the steps below, as indicated in the File Transfer Fact Sheet

• Ask the beneficiary to sign the required releases.
• Fax releases and request for file transfer template to your project officer.
• Maintain a paper file, using the ETO forms, until the requested file transfer is complete in ETO.

When the file transfer is complete, you will see it as a new referral in your ‘View Pending Referrals’ queue. You will know that it is a file transfer because the referring site column will show something other than ‘Call Center’.
IMPORTANT!! Before accepting the referral, you will need to change the Program Start Date to the date that the beneficiary first contacted you and you initiated services. It is critical that you change this date so that you have the correct enrollment date for this record. All data that you enter from your paper file should be dated the same day as enrollment or later to be captured accurately towards your benchmarks. See the following screen shot indicating the field that MUST be changed prior to accepting the transfer referral.

- **Option #2 - Beneficiary contacts the TtW Help Line:**

When a beneficiary contacts the TtW Help Line, they will be screened for potential WIPA referral following the established procedures. The Help Line agent will refer beneficiary as appropriate to the new WIPA. The referral will show exactly as any other referral from the Help Line in your 'View Pending Referrals’ queue. You should accept the referral and continue providing services and documenting as usual in ETO.

The only way that you will know that the beneficiary had been previously served by a different WIPA project will be by looking at the referral notes. The Help Line has been instructed to include the following statement in the standard referral notes template when the beneficiary had been previously referred to another WIPA, or the beneficiary indicates that they had been working with a prior project:

“This beneficiary was previously referred to prior WIPA that covered the service area; possible ETO file transfer request can be made with beneficiary’s permission.”

When the referral notes include the above statement, you should follow the steps below:

- Ask the beneficiary to sign the required releases.
- Fax releases and request for file transfer template to your project officer.
- Continue to document services in the ETO record that began with the accepted referral from the Help Line.

When the file transfer shows up in your 'View Pending Referrals’ queue, **change the program start date** (as described above for Option #1) to the date that the original Help Line referral was accepted, and
then accept the file transfer; this will add the prior file’s information to the current record you have established in ETO.

**WIPA SERVICES PROGRAM**

**Enrollments in WIPA Services**

*When to enroll a beneficiary in WIPA Services*

You should enroll all beneficiaries in WIPA who (1) you offer WIPA level services, (2) accept the offer for those services, and (3) you provide at least some WIPA level services. WIPA level services by definition are individualized services, and verification of benefits is necessary to provide this level of services. However, the BPQY is only one form of verification. CWICs do not need to wait for the BPQY before enrolling a beneficiary in the WIPA Services program, but probing questions should be asked. There is a protocol established in Module 6 of the CWIC manual for determining eligibility including a quick reference for CWICs. The verification is more critical than obtaining the signed releases or BPQY, as beneficiaries can provide verification of their benefits separate from these documents.

**How to Enroll a beneficiary in WIPA Services**

Beneficiaries should NEVER be directly enrolled in the WIPA Services program. Every beneficiary must first be entered into the I&R program and subsequently dismissed from I&R before being enrolled in WIPA. The SSN field in the I&R program must also be completed prior to enrolling the beneficiary in WIPA. Following are the steps to take when enrolling a beneficiary into the WIPA Services program:

- **Dismiss the beneficiary from the I&R program with the reason of: ‘referred to WIPA’**
- **Change program to WIPA Services**
  In order to switch from the I&R program to WIPA Services, click on ‘WIPA Initial Contact and Demographics’, which should be underlined, and then a dropdown box will be displayed that includes ‘WIPA Work Incentives Planning and Assistance’. Select ‘WIPA Work Incentives Planning and Assistance’ (WIPA Services program) and the screen will change to the WIPA Services home page.

- **Using the ‘Enroll Beneficiary’ link on the home page for the WIPA Services program, search for the beneficiary by SSN.**
• Required fields for the Demographics/Intake Page were completed in the I&R program, but be prepared to update demographics as needed as you get more information from the beneficiary.

• SSN is a required field!

Assessment in the WIPA Services Program

Baseline Assessments

The purpose of the Baseline Assessment is to capture a snapshot of the beneficiary’s situation when they are first enrolled in the WIPA program. That is why it is called a ‘baseline’. A Baseline Assessment MUST be completed for ALL beneficiaries enrolled in WIPA. Many of the WIPA Benchmarks are contingent on the beneficiary having a completed baseline assessment, although it is not a specific benchmark of its own.

Every section of the Baseline Assessment is required to be fully completed. The baseline is considered to be complete when verification of ALL benefits is finished. Given that, you may find that it will take more than one sitting to complete it.

Completing the Baseline Assessment

The baseline assessment should be started immediately upon enrolling a beneficiary into WIPA Services. CWICs should save the baseline as a ‘draft’ while completing all verifications. Once verification is complete, the baseline is finished and should be submitted. Once you submit the baseline as final, it will automatically lock 10 days after the date of the assessment. No changes can be made to the baseline once it is locked, so it is critical that you continue to ‘Save as Draft’ until all verification is complete and documented in the baseline assessment. Some beneficiaries may have numerous changes occurring in their lives while you are working with them. This can make it difficult to understand when you should enter additional data in the baseline versus considering the baseline completed and recording a beneficiary’s ‘new’ information in an Effort. Remember that the baseline is the starting point that documents where the beneficiary is at the onset of WIPA services; all changes that occur after that point will be documented on the Efforts form or the demographics page.

To access the baseline assessment:
From the beneficiary dashboard, select +New in the Recent Assessments section and you will go directly to the baseline assessment form.

OR

- Select the ‘Beneficiary Assessment’ link from the home page
- Search for the beneficiary by last name, SSN, or case number, then click on the beneficiary name.
- Click on ‘Take New Assessment’
- Select ‘WIPA Work Incentives Plan (Baseline)’ in the drop down box and hit ‘Continue’

Baseline Assessment – required information

It is important that the baseline assessment be as complete as possible as this establishes the beneficiary’s situation at the onset of services. All relevant questions that pertain to the beneficiary and the particular benefits that they receive should be completed in the baseline assessment. It is permissible to skip those questions that are not applicable to the beneficiary. For example: you do not
need to answer the questions related to Title II work incentives if you are completing a baseline for an SSI-only beneficiary, and vice versa.

**Efforts in the WIPA Services Program**

**Definition of an Effort**

In the WIPA program, efforts are defined as any action with or on behalf of the beneficiary. The CWIC should record every contact, attempted contact, or action with a beneficiary or with another entity on behalf of the beneficiary as an effort. Beneficiary Efforts include things like: attempt to contact, questions about the use of a work incentive; discussion of how to report earnings to SSA; discussion with the VR counselor about the beneficiary’s use of a work incentive; discussion of a potential increase in work hours that is being considered; the completion of a BS&A and the completion of a WIP. It is important to note that Efforts include activities you do either with OR on behalf of the beneficiary. So, it is not necessary to have the beneficiary with you or directly involved with the activity you are engaged in on their behalf, for it to qualify as an Effort.

**How to Record an Effort**

The CWIC should make sure the WIPA program is selected before recording an effort! Click on Beneficiary Effort’ on the home page in order to record an effort in the WIPA Services program. Search for the beneficiary by last name, SSN, or case number. Select the proper beneficiary then at the next screen, select the ‘Take New TouchPoint’ button. On the next screen, select ‘Efforts Form’ and you will then be taken directly to the effort form.

Alternatively, you can access the effort form directly from the beneficiary’s dashboard by clicking on the ‘+ New’ link in the ‘Recent Efforts’ section of the dashboard.

**Completing the Effort Form**
It is critical that you enter the appropriate date on your effort form that documents when you completed the service or activity. The date field will always display today’s date, so when doing back data entry, you must change the date first! See the screen shot below.

![Efforts Form for Lulu Fake on 7/11/2017](Image)

The next section of the effort form is related to the actual content of the contact, the service delivered, and the time spent on the effort. It is critical that you fill out all the relevant fields to capture what you did with or on behalf of the beneficiary. The ‘Time Spent’ field should be an indication of the time engaged in the activity with or on behalf of the beneficiary and not include the data entry time to record the effort.

**Selecting the ‘Type of Service’**

The following table provides some examples of activities that would fall under each ‘Type of Service’ choice that you might select when recording efforts. This is not an all-inclusive list, but should provide some guidance to help you determine the proper type of services to select when documenting efforts.

<table>
<thead>
<tr>
<th>Type of Service (WIPA program effort)</th>
<th>Examples / Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intake and Information Gathering</td>
<td>• Sending releases to obtain BPQY.</td>
</tr>
<tr>
<td></td>
<td>• Receipt of BPQY.</td>
</tr>
<tr>
<td></td>
<td>• Sending releases for verification of state benefits.</td>
</tr>
<tr>
<td></td>
<td>• Receipt of state verification of benefits</td>
</tr>
<tr>
<td></td>
<td>• Documenting conversations with beneficiary or other providers related to benefits verification.</td>
</tr>
<tr>
<td>Report Writing (sub-category in BS&amp;A and WIP development section)</td>
<td>• Discussion with WIL or AWIC regarding questions on BPQY, etc. necessary to analyze info for BS&amp;A</td>
</tr>
<tr>
<td></td>
<td>• Development of BS&amp;A and WIP (writing, peer or TA review, finalization)</td>
</tr>
<tr>
<td></td>
<td>• BS&amp;A or WIP completion and sending to beneficiary</td>
</tr>
<tr>
<td></td>
<td>• Review of BS&amp;A or WIP with beneficiary</td>
</tr>
<tr>
<td></td>
<td>• Update of BS&amp;A or WIP</td>
</tr>
</tbody>
</table>
| Work Incentives Development | • Discussion with beneficiary about documenting IRWE or subsidy  
• Conversation about types of accommodations that might indicate subsidy and how to get employer documentation  
• Follow up with WIL or AWIC on submission of IRWE request  
• Earnings report assistance when work incentives apply (TWP, IRWE, subsidy, SEIE, PASS.)  
• Development of PASS activities  
• Anything related to an approved PASS (amendment requests, assisting beneficiary with tracking/documentation, etc.)  
• Assisting beneficiary with work activity review report |
| --- | --- |
| Problem Solving & Advocacy (re: return to work supports) | • Follow up on non-work related issues  
• Recommendations for advocacy services (PABSS or CAP), or other support referrals (other state agencies, CILs, VA, 211.org, IRS, SBA, SCORE, etc.)  
• Assistance with resolutions of benefits issues (options for dealing with OP due to work activity) |
| Long Term Support Services | • Benefits literacy / teaching self-management of benefits  
• Follow up on identified critical touchpoints from the WIP  
• Assistance with changes in benefits as work progresses through all phases of work incentives  
• Understanding EPMC and other health coverage options beyond the EPMC  
• Assistance with impact of life changes on benefits & work (change in type of benefit received, marriage, divorce, children on their record, other benefits, etc.)  
• EXR assistance |

**When to record efforts**

The CWIC should begin recording efforts as soon as the beneficiary is enrolled into the WIPA program. It is NOT necessary to wait until the baseline assessment is completed to begin recording efforts. The actions taken to complete benefit verification should be recorded as efforts.

**Capturing efforts related to BSA development and completion**

The Effort form now provides distinct options for different activities that you may perform related to development of a BS&A or a WIP. Not only are there several status options, there is also a distinct type
of service option at the top of the effort form. When you are recording an effort related to BS&A or WIP development, the type of service would be: Report Writing.

Once you are at the section of the effort form titled ‘BS&A Development / Status’, there are now several distinct options to choose from when recording the BS&A effort tasks. The options include:

- Development of BS&A (writing, peer or TA review, finalization)
- BS&A Completed and Sent
- BS&A Updated
- Reviewed BS&A with Beneficiary

The way you would record your efforts for BS&A development is slightly different from the prior guidance in the old ETO configuration. Following is an example of how to properly record BS&A or WIP development efforts in the current ETO configuration.

**Effort #1**
- Type of Service Provided: Report Writing
- BS&A Development/Status: Development of BS&A
- Notes: Began analyzing information gathered, BPQY, and follow up info from WIL. Prepared initial sections of BS&A.
- Time Spent on Contact: 30 minutes

**Effort #2**
- Type of Service Provided: Report Writing
- BS&A Development/Status: Development of BS&A
- Notes: Completed initial writing of BS&A and sent to supervisor for review.
- Time Spent on Contact: 45 minutes

**Effort #3 (recorded by the supervisor reviewing BS&A)**
- Type of Service Provided: Report Writing
- BS&A Development/Status: Development of BS&A
- Notes: reviewed BS&A developed and returned to CWIC with comments.
- Time Spent on Contact: 30 minutes

**Effort #4**
- Type of Service Provided: Report Writing
- BS&A Development/Status: BS&A Completed and Sent
- Notes: Revised BS&A based on comments from supervisor. Mailed to beneficiary.
- Time Spent on Contact: 15 minutes

**Effort #5**
- Type of Service Provided: Report Writing
- BS&A Development/Status: Reviewed BS&A with Beneficiary
- Notes: Phone call with beneficiary to go over any questions about the BS&A. Reviewed calculations sent with BS&A.
- Time Spent on Contact: 60 minutes
In order for your BS&A or WIP to be counted towards your benchmarks, you MUST ensure that you have properly selected the ‘BS&A Completed and Sent’ option in the ‘BS&A Development/Status’ field as shown below:

Editing an Effort

The CWIC should first access the ‘Beneficiary Dashboard’ in order to edit an effort that was previously recorded. There are two ways to access the dashboard, either by using the ‘Quick Search’ tab at the top navigation bar, or via the ‘View/Edit Beneficiary’ link on the home page.

When using the ‘Quick Search’ tab, search by last name, then click on the beneficiary’s name and a pop-up box will display with a link to the beneficiary dashboard as shown below:

After clicking on ‘Beneficiary’s Dashboard’, you will click on the pencil icon (edit) next to the effort that you want to edit in the ‘Beneficiary’s Recent Efforts’ box on the dashboard.
The effort will open and you can make any edits that are necessary.

The CWIC can also access the dashboard from the ‘View/Edit Beneficiary’ link from the home page. After clicking on that link and searching for the beneficiary by last name, you will see the demographics page with a link to the Beneficiary Dashboard at the top of the form.

**Dismissal in the WIPA Services Program**

The CWIC is NEVER required to dismiss a beneficiary from WIPA and this dismissal is not recommended; it is an optional action and should only be considered for the following reasons:

- Moved out of service area
- Passed away

**Uploading, Scanning, and Storing Documents in ETO**

WIPA projects now have the capability of saving and uploading documents directly into the remote Social Solutions servers. There will be four different types of documents: (1) those created on their secure government furnished computer and uploaded into ETO, (2) those created on a different
computer that will be uploaded to the secure government furnished computer, (3) those that are received from other sources electronically and uploaded, and (4) those that are received from other sources in hard copy format and subsequently scanned and saved to the hard drive of the government furnished computer.

**Important Note:** The following guidance regarding beneficiary data is provided by the Social Security Office of Research, Demonstration, and Employment Supports:

CWICs should never enter files containing PII or beneficiary information into any other data base or computer. Please refer to the WIPA Terms and Conditions document regarding alternate data bases. ETO, used ONLY on the secure Government furnished computer, is the ONLY approved environment. The CWIC should not retain any beneficiary files, information, or PII in any other electronic environment.

Regarding new WIPA clients, we cannot prohibit paper files but once again, all rules and directives must be strictly followed regarding the maintenance of paper files and, at some point, we will once again require destruction of paper files.

There are no ‘required’ uploads. However, Social Security is eager to minimize paper records to the greatest extent possible and therefore we strongly encourage uploading pertinent documents. There are many reasons for this; the first is paper reduction and mitigating potential loss of files. Second, all information is in a secure environment. If there are paper files, the WIPA must follow all guidance and directives on maintaining paper files according to the cooperative agreement.

**How to Upload Documents in ETO**

CWICs can upload documents in both the I&R program and the WIPA services program. There are no limits to the number and/or frequency of documents that can be uploaded.

*To upload a document in either the I&R or WIPA Program:*

- Search for the participant
- Click on the beneficiary name and a box pops up
- Select ‘View/Record TouchPoint’
- Select ‘Take New TouchPoint’
- Select ‘Upload File’
- Enter the date of the upload
- Name the file that you want to upload in the ‘Identifier’ box and hit ‘Select’ next to the File box; a new window will open to find the file on your computer to upload. Once you have located the file, double-click on it and it will be uploaded. Do not hit ‘Save’ until you see a green box and the file name displayed on your screen.
- Hit ‘Save’ once you see the file and a green square next to the file name. You will get a success pop-up indicating that your upload was submitted; hit ‘OK’.
CWICs can also upload documents directly from the beneficiary dashboard by selecting the +New link in the ‘Recent Files’ section of the beneficiary dashboard. Once you click on the +New link, you will follow the same steps described above.

**Transferring documents from other computers and sources to the Social Security laptop**

Contact the ETO Technical Help Desk for assistance and procedures for transferring documents from other computers and sources to the Social Security laptop.

**Entering Back Data**

Social Security strongly encourages projects to enter their data at the time of service delivery. However, there are times that data must be entered at a later date. Following are some tips and strategies to help with correctly entering back data.

**Strategies & Tips**

- When entering back data, CWICs should prioritize entering those beneficiaries who are, or were, receiving intensive WIPA services (even if they were currently inactive). Once all data entry is complete for WIPA level beneficiaries, CWICs should focus on entering I&R-only beneficiaries as time permits.

- When creating new participant records, be sure you are entering the actual enrollment date, rather than enrolling them with "today's date" as the date of enrollment. The system will default to today's date, so you will need to manually change this. Also be sure that you adjusted the 'date of first inquiry' field on the demographics page to the appropriate date (which is likely also the I&R enrollment date).

- Efforts in ETO cannot be back-dated before the participant's enrollment date. You can't provide a valid service to a participant BEFORE they have been enrolled. If you experience an error message when entering back data efforts, check the enrollment date. If the enrollment date is incorrect, the CWIC will need to contact the ETO Technical Help Desk. Only ETO users with a security role of "Site Manager" and above are allowed to adjust a participant's enrollment date even after the participant has been enrolled. Currently, the ETO Technical Help Desk staff is the only group permitted to make these adjustments.

**Using the “To Do” list**

You can maintain a “To Do” List in the I&R Program to track beneficiaries you are providing I&R services to, and you can also have a “To Do” List on the WIPA Work Incentive Planning and Assistance (WIPA) program.

**Adding items to the “to do” list**
The CWIC has two ways to place items on the To Do List; Efforts and Assessments. Both the Effort form and the Baseline Assessment have the same procedures to schedule a follow-up contact that can be placed on your to-do list, or on the to-do list of another staff member. To schedule a follow-up contact:

- Check off “Schedule Follow-Up Alert to show up on your To-Do list”.
- Set the Alert Date (which will be the date your “To Do” list flags you to do something for or with this beneficiary).
- Under ‘Alert Type’, you can choose to be reminded to complete this TouchPoint (effort or assessment) or to take a new one.
- Then under ‘Alert Notes’ include brief information that reflects what you did and what the next step is in regard to this assessment. This note will appear on your To Do List so be sure to include information that will help you clarify what needs to be done for this beneficiary on the date they are flagged to have something done.
- Click Submit.

**Follow-up Contact:**

- Check off **Schedule Follow-up Alert** to show up on your To-Do list
- Check off **Schedule Follow-up Alert** to show up on Other Staff’s To-Do list

**Alert Date:**

- [ ] Alert Date: [ ] +1 | +7 | +30 | +60 | +90

**Alert Type:**

- [ ] Reminder to complete this TouchPoint
- [ ] Reminder to take a new TouchPoint

**Alert Notes:**

- Enter brief information that reflects what you did and what the next step is in regard to this assessment.

**Viewing Your “To Do” List**

- Click on the “To Do List” tab, just to the right of the “Quick Search” tab

- Just below the ‘Quick Search’ and ‘To Do List’ tabs, a question and drop down box will appear: ‘Show To Do List for: To Do List’. Click ‘Go’

- Your “To Do” List will appear. Make sure the “Show” is set to “Participants”. It will show everything you have on your To Do List by default, but you can change the “Period” to only show those
beneficiaries you have a Due Date for a different period, such as “Today”. If you have missed a due date for someone, it will be noted in the Past Due column. To clarify what needs to be done for each person, click the “+” just to the left of their name.

- After you click the “+” next to their name, the items you need to follow up on will appear. If there was a Next Date of Contact set for this person on an Effort, then you will see “Efforts Form”. If you had set an Alert Date on an assessment, then “Baseline Form” will appear. There will be a “+” next to each of these.

- If you click the “+” next to the “Effort Form” or “Baseline Form” it will show you the core details you included in the last Effort or Assessment follow up. From this detailed section on the “To Do” List, you can review when your last Effort was (see the left side of this section), and the notes from your last effort (see the right side of this section. The beneficiary’s phone number is listed on here as well, making it convenient for you to contact the beneficiary without having to go to a different location in ETO.

- Additionally, from this detailed section, you can take actions. If you take any action on behalf of or with this beneficiary, then you can simply click “Take Form” and a blank Effort will appear. You then simply complete a new Effort, and be sure to enter the new Next Date of Contact so they are put back on your To Do List if you are going to continue to provide them services. If you determine you aren’t going to address the task for this beneficiary today, then you can simply click on the “Other Actions”, select “Update Form”, and enter in a new Due Date to push this task out to a future date.
Adding Items to another staff member’s “To Do” List

It is possible to add follow up items to another staff person’s “to do” list. This is most commonly used when an intake specialist enters initial beneficiary information into ETO, but a different CWIC will be providing the actual services to the beneficiary; or when another staff person may be assisting with data entry.

Follow up items can be added to another staff member’s “to do” list via efforts and assessments by using the steps previously outlined for the ‘schedule follow up alert’ section at the end of the assessment. The difference here is that you will select the box next to ‘Schedule Follow-up Alert to show on Other Staff’s To-Do List’ as identified below.

Once you check this box, another drop down will open that allows you to select the program and staff person who you are assigning the follow-up to. After hitting ‘submit’, the alert will be added to that person’s “To Do” list.

Messages Tab

Using the Messages tab

‘Messages’ is a new feature in ETO that opens up a secure line of communication with other CWICs within your site. You will find that other staff (VCU TA Liaisons, Technical Help Desk, and Social Solutions) will also be listed as they also may have access to your site.

Those projects that have intake specialists, or data entry people, may want to use this feature as a mechanism to alert CWICs of beneficiaries who need services, new cases being assigned, etc. To create a new message, click on the ‘Messages’ tab on the home page (next to the ‘To Do List’ tab), then:

- click Create Message
- click Send to One or More Staff Members
• Select Staff to receive message (Use CTRL or SHIFT to make Multiple Selections)
• Click Submit
• Enter your message in the text field and hit ‘Send Message’.

Typically when there are new messages, the ‘Messages’ tab is orange rather than the standard green. However, you might want to encourage staff to check this tab daily if you plan to use this feature. Here is how the message will appear on the receiving staff end: