



# ETO Data Entry Quick Reference Guide

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## I&R Program

### 1. Enrollment:

- Enroll all beneficiaries who: (1) meet the overall WIPA eligibility criteria, and (2) receive services.

*Example: Joy calls your agency. The intake specialist determines she meets the WIPA eligibility criteria and lets her know a CWIC will call her in the next few days. You try calling Joy several times, leaving messages, but never reach her. While she meets WIPA eligibility criteria, you never provided her services so she should NOT be enrolled in ETO*

*Example: Bill calls and you answer the phone. You clarify he meets the WIPA eligibility criteria and answer a few of his questions about the impact of earnings on various benefits. Since you determine he meets WIPA eligibility criteria, and you provide him some services, you should enroll him in ETO.*

### 2. Efforts (Initial Case Notes or I&R Case Notes):

- Completely Optional

### 3. Uploads (Efforts/Touchpoint)

- Completely Optional

### 4. Dismissal:

- Dismiss ONLY if the beneficiary receives WIPA level services.
- The only other acceptable time to dismiss is if the beneficiary has passed away, or has moved to a different WIPA service area.

# WIPA Program

## 1. Enrollment:

- Enroll all beneficiaries who: (1) you offer WIPA level services to, (2) accept the offer for those services, and (3) you provide at least some WIPA level services.

*Example: Joy calls; you clarify she meets WIPA eligibility criteria and provide her information and referral services. She shares that she has been offered a job, so you offer to verify her benefits and provide her more detailed information; she agrees that will be helpful. You mail her releases. She doesn't return the releases and doesn't return your call. While you would enroll her in the I&R Program, you would NOT enroll her in the WIPA program because you didn't provide her WIPA services.*

*Example: Joy calls; you clarify she meets WIPA eligibility criteria and provide her information and referral services. She shares that she has been offered a job, so you offer to verify her benefits and provide her more detailed information; she agrees that will be helpful. You mail her releases. You receive the signed releases 2 weeks later and begin the verification process. You are providing individualized services at this point, so you would enroll her in WIPA services.*

- To enroll a beneficiary in the WIPA program, they must be enrolled in, and then dismissed from, the I&R program

## 2. Assessments:

- Baseline Assessment: Every beneficiary enrolled in the WIPA program must have a Baseline Assessment.
  - The Baseline Assessment is complete once all benefits have been verified and all sections have been filled out.

*Example: You meet with Debra, who is receiving SSDI and is close to finishing a teaching degree. She has her BPQY with her, which you review together. You get answers to all the Baseline questions except Medicaid. It's not clear whether she has Medicaid or not, so you get an additional release from her. You get back to your office, contact the Medicaid agency and verify she doesn't have Medicaid. You can now complete the Baseline Assessment.*

- Save the Baseline Assessment as 'Draft' until all verification is complete, then 'Submit' as final.

### **3. Efforts:**

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

*Example: You complete Debra's BSA. A WIPA Effort should be recorded to reflect that fact. You call Debra and leave her a message that you put it in the mail and to call you if she doesn't get it in 3 days. This activity is also considered an effort. You have your scheduled phone appointment with Debra to review the BSA and discuss reporting earnings. A WIPA effort should be recorded to reflect this action as well.*

### **4. Uploads (Efforts/Touchpoint)**

- All pertinent case documents such as: signed releases, BS&A, WIP, pay information, earnings reports, etc. should be uploaded into the case record.

### **5. Dismissal:**

- Dismissing from WIPA is NEVER recommended; it is an optional action - for only the following situations: moved out of the service area, or passed away.