Work Incentives Planning and Assistance
National Training and Data Center

ETO Tips & Reminders – A Resource for the Ticket to Work Help Line

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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! There is only one search mechanism within the ETO system that will identify BOND beneficiaries, so you must follow the exact steps listed below for every caller.

- 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"
    - Former BOND participants will have a date displayed in the "End Date" column.
    - Current BOND participants will have a blank field in the "End Date" column.
- NOTE: A matching Help Line record will show "Call Center" in the Site Pull Down column.

PARTICIPANT NAME	SSN	PROGRAM START DATE	END DATE	SITE PULL DOWN
ruthie				
fake, ruthie	333333333	11/12/2015	03/01/2016	ZZ - WIPA BOND

Next Steps

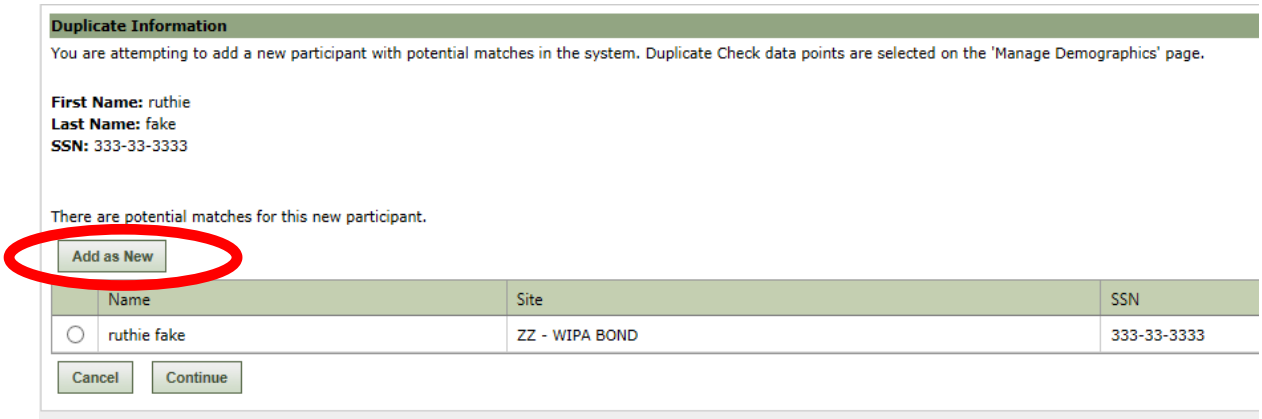
Depending on the results returned after completing the search for current WIPA and BOND participation, you will have different actions to take. The results that will display include:

- Former BOND participant – can be referred to WIPA
- Current BOND participant – refer to BOND Call Center
- Current Call Center participant – re-contact email or new referral (see process tip #1)
- 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 and refer to WIPA as appropriate.

- Go back to the Home Page and click on blue link called "**Add Beneficiary**"
- Complete all required fields on the demographics page as usual.
- Hit 'Save'. You will see a potential match screen just after saving.
- Click the button '**Add as New**'.



- Do **NOT** select the matching record that shows as a possible match.
- 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. Please click on the "**no end date**" link in your call flow to access the appropriate script to connect the caller back to the BOND Call Center.

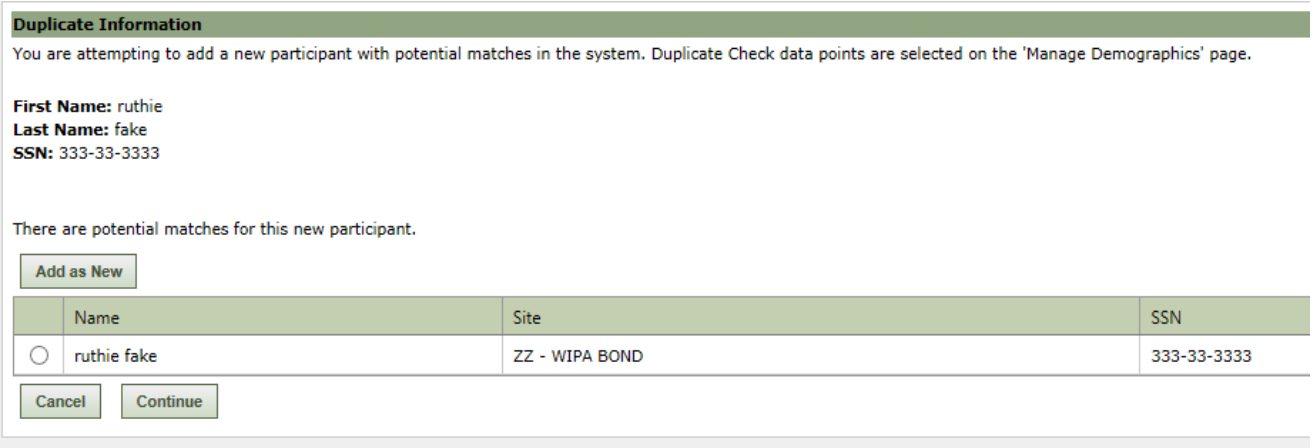
> **NOTE**: if there is not an end date and the caller indicates that they received a letter stating that their participation is ending, please use the "**no end date, letter received**" link to access the appropriate script in your WIPA call flow.

Current Call Center participant – These participants will have 'Call Center' shown in the Site Pull Down column. This means that the beneficiary is already in your site. Do NOT add a new record. This situation will either result in a re-contact email to the appropriate WIPA, or a new referral, depending on the original referral date and receiving WIPA project (see full guidance in section titled "process tip #3").

No Records to Display – The beneficiary is not in BOND and is not currently in the Call Center site. Add the beneficiary as new and refer to the appropriate WIPA.

BOND and Potential Duplicate Check

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 on the next page, may pop up that indicates there may be a potential duplicate in the project site (already enrolled) or in BOND (identified as "ZZ-WIPA BOND").



Duplicate Information

You are attempting to add a new participant with potential matches in the system. Duplicate Check data points are selected on the 'Manage Demographics' page.

First Name: ruthie
Last Name: fake
SSN: 333-33-3333

There are potential matches for this new participant.

Add as New

	Name	Site	SSN
○	ruthie fake	ZZ - WIPA BOND	333-33-3333

Cancel Continue

If the name and SSN of the potential duplicate are different, click the 'Add as New' button. Do NOT select the record shown in the table or you will inadvertently add a BOND beneficiary into your site. Don't be alarmed if you see the potential duplicate screen; lots of people have the same name, but different SSNs.

In situations where you may not have done the initial 'Search for current WIPA and BOND beneficiaries' step, and you end up with a true match (name and SSN) shown in "ZZ-WIPA BOND" site on the potential duplicate screen, hit the 'Cancel' button. Refer the beneficiary to the BOND Call Center for assistance.

BOND Alerts and "Fake" Procedure

In the event that you do encounter a beneficiary with an alert on the record indicating BOND participation, there is a process to remove this record from your ETO site. There are multiple places that an alert will display when a BOND participant is in an ETO site, including:

- The 'View/Edit' screen, or beneficiary demographics page, and
- The beneficiary dashboard.

The alert will include the following statement: "*This beneficiary is a participant of BOND Treatment Group (T1-WIC, T21-WIC, T22-EWIC) and should be advised on how the $1 for $2 BOND offset would affect SSDI benefits or referred to the BOND Call Center at 1-877-726-6309, or 877-726-6390 (TTY).*"

This alert is an indication that a BOND beneficiary is in your ETO site and should be removed. You can remove a record by changing the last name to Fake. Fake records are periodically "swept" from all sites and permanently removed.

ETO Referral Process Checklist

Step 1: Click on the first blue link on the Home Page called "**Search for current WIPA and BOND beneficiaries**"

- Enter the 9-digit SSN in the search box. Do NOT include dashes or spaces.
- If no matching record comes up, continue to Step 2.
- If a matching record is shown, check Site Name for "Call Center" or "WIPA-BOND" and follow appropriate procedure as outlined in section above titled "Identifying Current and Former BOND Beneficiaries".

Step 2: Go back to the Home Page and click on blue link called "**Add Beneficiary**"

- Complete all required fields (identified with a red asterisk) on the demographics page.
- Hit 'Save'

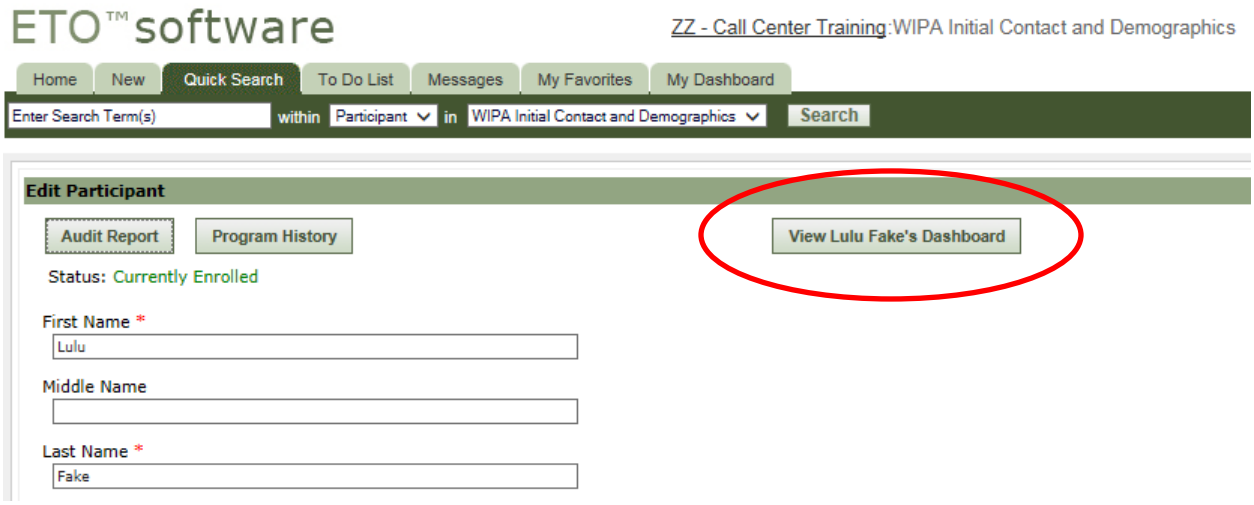
Step 3: Go back to the Home Page and click on the blue link called "**Refer Beneficiary**"

- Search for the beneficiary by last name or SSN
- If using SSN, do NOT include dashes or spaces, hit "Go"
- Select the matching beneficiary record by clicking on the name
- Select "to site" and hit "Submit"
- Select (click on) the WIPA agency/site that matches the WIPA project that you found on the 'WIPA Coverage Areas' document that serves the beneficiary.
- Select the Program in the next dropdown box – "WIPA Initial Contact & Demographics".
- Select "Referral to WIPA" in the "Reason for Referral" field.
- Select "Referred" in the "Referral Status" field.
- Enter the number of minutes you spent on the phone with the beneficiary in the "Time Spent on Contact" field.
- Copy the referral notes template into the "Referral Notes" field and provide the appropriate information.
- Hit "Submit"

Process Tip #1 - Viewing Prior WIPA Referral Information

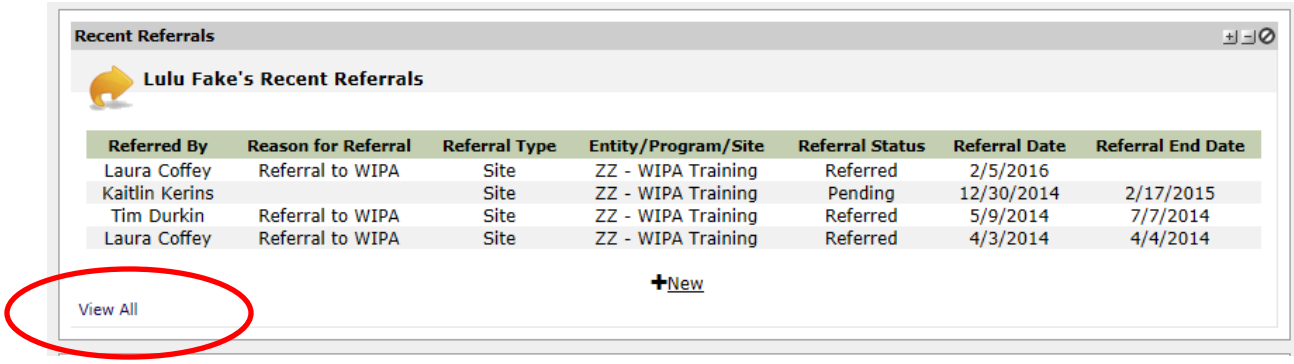
To view details about previous Help Line referrals for a specific beneficiary, search for the beneficiary using the 'View/Edit Beneficiary – Update demographics' link from the home page. Confirm that the address and phone number for the beneficiary are correct on the

demographics page (view/edit). If all is correct, click on the 'View *Beneficiary Name's* Dashboard' button at the top of the page.



Otherwise, please make the appropriate edits, then save the record. After saving successfully, click on the 'View *Beneficiary Name's* Dashboard' button at the top of the page.

On the beneficiary dashboard, you will find a section titled 'Recent Referrals'. This section of the dashboard will display the general information about the referrals, including who made the original referral, on what date, and to which WIPA site. To see the original referral notes, you can click on the 'View All' link in the lower left corner of the 'Recent Referrals' section.



On the next page, you can view the original referral notes by clicking on the 'Details' button. If there are multiple referrals, you can also click the 'Show All Details' button to open all referral details.

IMPORTANT NOTE: Do NOT click the 'Delete' or 'Print' buttons under any circumstances! Before going back to the Home Page, note the name of the WIPA Project that received the referral, the date of original referral, and name of the referring CSR. Go back to the ETO Home Page and prepare the re-contact email to the appropriate WIPA POC.

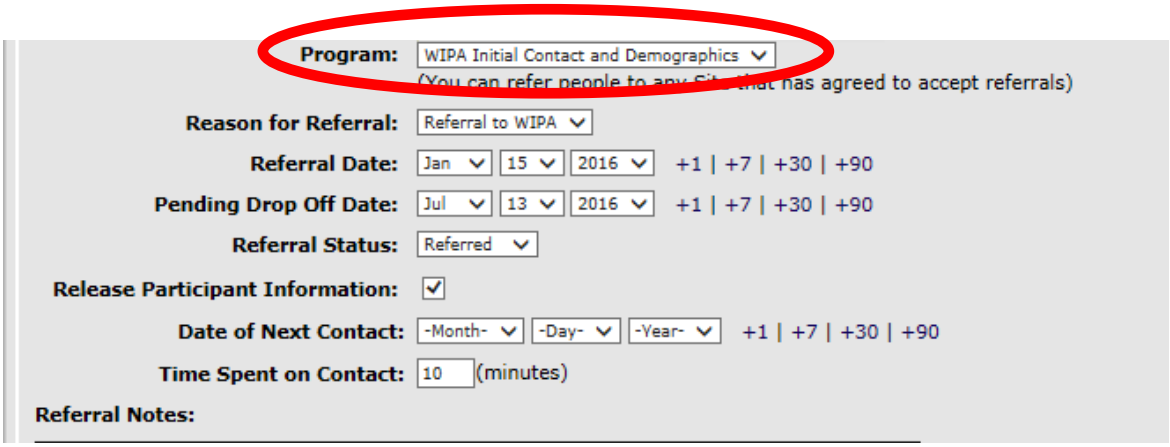
Process Tip #2 – Generating the Referral Properly

When processing a referral, it is important that all relevant fields are completed. There are two fields in particular that control specific functions during the referral process, and if they are not properly completed, all portions of a referral will not transmit properly to the WIPA. The specific fields are:

- Program, and
- Release Beneficiary Information.

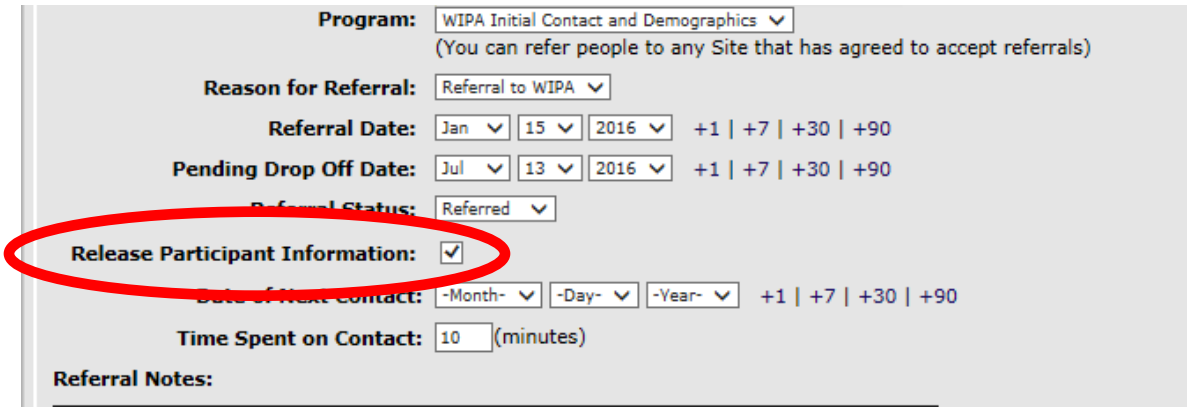
Auto Email Function

The 'Program' field in the referral form controls the system-generated email to the WIPA alerting of a new referral. You must select "WIPA Initial Contact & Demographics" or the auto-email will not generate to the corresponding WIPA. This particular field only appears after you have selected the appropriate WIPA project in the 'To Site' field.



Releasing Beneficiary Information

The referral form contains a check box titled 'Release Participant Information' that should be checked by default as shown in the screen shot below.



It is critical that you ensure the box is checked or none of the beneficiary demographic information will transmit with the referral. All the receiving WIPA will get is the beneficiary name upon accepting the referral.

In the event that a WIPA contacts about a "blank" referral, you will need to process a new referral and ensure that the box is checked on the new referral. In order to capture the original referral notes, you can view the prior referral information by following the steps outlined in the Process Tip #1 section of this document.

Process Tip #3 – Beneficiary Re-contacts

Background Information

Beneficiaries previously referred to WIPAs re-contact the Help Line for a wide variety of reasons. The new WIPA call flow and referral decision process necessitates a change in current protocols related to beneficiary re-contacts. The changes relate to the time frame of the original referral, and generally fall into the following groups:

- Beneficiaries calling back within 5-7 business days of referral,
- Beneficiaries calling back within 30 days of original referral, and
- Beneficiaries originally referred more than 30 days ago.

In addition to the time frame of the original referral, the other relevant component is proximity to work. Re-contacts will now follow the same criteria you use for determining whether to refer to WIPA or not. Following are detailed instructions for each re-contact time frame.

Help Line Protocols

Beneficiary calls back within 5-7 business days of WIPA referral

- Remind the beneficiary that it is still within the initial 5-7 business day contact period for the WIPA. Thank the beneficiary for their patience and reassure them that the WIPA will be reaching out to them.
- Provide additional reminders about checking voicemail regularly, answering calls from unknown numbers, and provide the WIPA agency name again.
- Offer to assist in answering questions using the FAQ scripts. Be sure to include the statement that the information you provided was general, and a reminder that the WIPA will be able to address the questions related to their specific situation.
- Thank them for calling and close the call as you normally would.
- Do NOT send a re-contact email to the WIPA.

Beneficiary calls back within 30 days of original WIPA referral

- Apologize that they have not yet connected with the WIPA and offer to send an email to the WIPA requesting they continue attempts to contact.
    - **Example**: "*I see that you were recently referred to the WIPA that serves your area. I'm sorry that you haven't connected with them yet; I'll be happy to send an email asking them to continue attempts to reach you. I'll also include any questions or concerns that you have in the email*."
- Offer to assist in answering questions using the FAQ scripts. Be sure to include the statement that the information you provided was general, and a reminder that the WIPA will be able to address the questions related to their specific situation.
    - **Example**: "*Was there a particular question that I could perhaps help you with in the meantime?"*
    - **After answering with FAQs**: "*Please remember that the WIPA you were referred to can provide you more specific answers to your questions; the information I provided you is very general and not tailored to your specific situation*."
- Thank them for calling and close the call as you normally would.
- Send a re-contact email to the WIPA using the standard re-contact email template.

Beneficiary's original WIPA referral was more than 30 days ago

First, screen the caller for proximity to work using the questions in the new WIPA call flow.

"Are you working?"
"Do you have a job offer?"
"Have you interviewed for a job in the last 30 days, or have an interview scheduled in the next 2 weeks?"

Beneficiary is working, has a job offer, or is interviewing:

- Mention the prior WIPA referral, and offer to send an email to the WIPA requesting they continue attempts to contact.
    - **Example**: "*I see that you were referred to the WIPA that serves your area in the past. Based on your situation, I think that you would benefit from re-connecting with them. I'll be happy to send an email asking them to contact you again. Before I do that, I'd like to go over a few things with you, including some information about the WIPA's services.*"
- Proceed to WIPA Introduction in call flow. Offer to assist in answering questions using the FAQ scripts. Continue with WIPA Re-Introduction. You do not need to ask permission to refer or review the privacy statement, but please be sure to include a statement that the information you provided was general, and a reminder that the WIPA will be able to address the questions related to their specific situation.
    - **After answering with FAQs and WIPA Re-Introduction**: "*Please remember that the WIPA I'm reconnecting you with can provide you more specific answers to your questions; the information I provided you is very general and not tailored to your specific situation.*"
- Ask for information about the job or job offer that you can include in the email to the WIPA, similar to what you would include in referral notes.
- Thank them for calling and close the call as you normally would.
- Send a re-contact email to the WIPA using the standard re-contact email template.

Beneficiary does NOT meet current referral criteria:

- Proceed with Message 2 and continue with "no referral" call flow to provide any necessary information and answer any questions.
- Thank the beneficiary for calling and close the call as you normally would.
- Do NOT send a re-contact email to the WIPA.

Special Situations

There are some re-contact situations that will arise that may not fit perfectly into one of the above groups, including beneficiaries who:

- Were engaged with the original WIPA,
- Moved to a new WIPA's service area,
- Do not meet the criteria for referral, but
- Insist on a referral to the WIPA that covers their new residence.

Beneficiary relocated, does NOT meet current referral criteria, but insists on WIPA referral:

- Apologize, explain that you are unable to process a referral through the system at this time, and offer to assist in answering any questions they may have.

- **Example**: "*I'm sorry but I will not be able to send a direct referral at this time. We have specific priority criteria for WIPA referrals. I'm happy to provide you some information and answer your questions.*"

- If you are able to satisfy the beneficiary with the above offer of assistance, proceed with Message 2 and the rest of the no referral call flow.
- If the beneficiary insists on a WIPA referral, please provide the phone number to the WIPA agency that serves their county.
  - **Example**: "*I'm sorry; as I mentioned, I'm not able to process a direct referral; however, I can give you the phone number to the WIPA that serves your area. The name of the agency is _____, and their phone number is_____. Please feel free to call us back if we can further assist you.*"

Process Tip #4 – Referrals Prior to 8/1/2015

Background Information

August 1, 2015 began a new period of WIPA Services. A new cooperative agreement competition occurred, and on 8/1/2015, the WIPA world changed. Some of the existing WIPA providers did not continue, some continued with different service delivery areas, and some new providers began services. As a result, the changes in WIPA providers and coverage areas meant some protocol changes related to beneficiary re-contacts occur.

Help Line Protocol

In situations where the original referral date is prior to 8/1/2015, remember that you need to double check the WIPA Coverage Area list to ensure that the same WIPA still covers the county where the beneficiary resides. When you have a different WIPA, not always indicated with the "ZZ" designation, you may need to make a new referral. Here are the steps to follow:

- When prior referral date is **pre-8/1/2015**, check the WIPA Coverage Area list to ensure that the same WIPA still covers the beneficiary county of residence.
- Screen the caller for proximity to work using the questions in the WIPA call flow.
  - *"Are you working?"*
  - *"Do you have a job offer?"*
  - *"Have you interviewed for a job in the last 30 days, or have an interview scheduled in the next 2 weeks?"*
- Continue using the appropriate track of the WIPA call flow – message 1 or message 2. Treat beneficiaries referred before 8/1/2015 who have a different WIPA provider the

same as any other caller not previously referred to WIPA. This is NOT a re-contact situation.

- If appropriate, process a new referral to the new WIPA and include the following statement in the referral notes: "This beneficiary was previously referred to prior WIPA that covered service area. Possible ETO file transfer can be requested with beneficiary's permission."

- If the same WIPA covers AND the caller meets the referral criteria, send a re-contact email.
- Please gather information about the job or job offer (similar to referral notes template) to include in the re-contact email to the WIPA.

If you already processed a re-contact email to the WIPA before realizing that a new referral to the current WIPA provider was appropriate, you will need to take the additional steps listed below:

- Call the beneficiary to alert them of the error, and that there is a new WIPA provider that serves their area.
- Request permission to process a new referral.
- Once permission is given, read the privacy statement and continue with the new referral to the WIPA.
- Be sure to provide the new WIPA's agency name, and remind the beneficiary that the new WIPA will contact in 5-7 business days.

Reminders

Beneficiary PII in Emails

Be sure that you do not include <u>any</u> beneficiary personally identifiable information (PII), including updated phone numbers, in re-contact emails you send to the WIPAs. When the beneficiary provides you an alternate contact number, or an updated phone number, please update the demographics page for the beneficiary in ETO and include the following statement in your email to the WIPA: "Please note that I have updated the beneficiary phone number in ETO." Also, it is important to add "updated info" to the subject line of the email.

NEVER include a beneficiary SSN in the subject line or body of an email!

Handling Referral Notes Errors

Please do not process another referral to the same WIPA if you realize that you copied the incorrect referral notes in the original referral. To avoid this issue, please be sure that you

erase the information that you collected in NotePad or Sticky Notes immediately after copying into the proper WIPA referral notes box. It is best practice to erase rather than leave the information in the template and overwrite.

In the event that you do accidentally send the wrong referral notes in a referral, please send an email to the WIPA POC using the following template:

> Dear WIPA,
>
> Earlier today I referred ETO case number (xxxxxx) and accidentally included the incorrect referral notes. Here is the correct information that should have been provided:
>
> - County of Residence:
> - Ticket Status:
> - Employment Status:
> - Job Details (job title, # hours/week, pay rate):
> - Employer health insurance?:
> - Earnings reported to SSA?:
> - Other benefits received:
> - Beneficiary concerns/questions:
> - Best time to contact – only include time, **DO NOT** include phone number. If the best number is different than what is in the demographics page of ETO, please update the record with the best number in the "alert" field.

Choosing the correct WIPA

When you are making a referral to WIPA, please be sure that when you search the WIPA Coverage Area list, you are searching by county AND state. Remember that many states have counties with the same name, so as you are searching the name of the county, be sure you also look at the state on the far left side of the chart.

Some WIPA projects will not have a full county listing because they cover the entire state, so you need to be very careful when searching. If only one match comes up for the county name, double-check the state for accuracy. For example: if you search for Tazewell county in the list, you will find one match in the list for VA ACCSES; however, if the beneficiary lives in Tazewell county IL, selecting VA ACCSES (in Virginia) is the incorrect WIPA. If you look at the IL WIPA projects, one covers the Entire State, except some zip codes in one particular county.

Locked out of ETO / Data Entry Assistance

If you are locked out of ETO and need your password reset, please contact the Technical Help Desk at support@wipaccess.com or 855-816-0890. Please do **NOT** contact Social Solutions directly for this type of assistance using the 'Forgot Password' or 'Need Help?' links on the ETO Home Page. Social Solutions will not be able to assist you with a password change or any other

issues you may experience with ETO. The Help Desk can help you get your password reset much faster.

If you have other issues with ETO data entry or processes, you should contact your TA Liaison, Laura Coffey directly at ljcoffey@vcu.edu or 502-479-5865.