



ETO and BOND Processes

August 2017

The Efforts to Outcomes (ETO) Data System contains basic demographic information related to beneficiaries participating in the BOND (Benefit Offset National Demonstration) project. The information is only available in the form of a special search query utilizing the beneficiary’s social security number (SSN). This document addresses several standard processes related to BOND beneficiaries that CWICs need to know, as well as strategies for handling issues that may arise related to BOND beneficiary records.

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 BOND beneficiaries, 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”
 - 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 WIPA record will show your WIPA program’s name in the Site Pull Down column.

PARTICIPANT NAME	SSN	PROGRAM START DATE	END DATE	SITE PULL DOWN
ruthie <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
fake, ruthie	33333333	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
- 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.

- 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’**.

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
<input type="radio"/>	ruthie fake	ZZ - WIPA BOND	333-33-3333

Cancel **Continue**

- Do **NOT** select the matching record that shows as a possible match.

If you are making a determination on a pending referral from the TtW Help Line and your search indicates that the beneficiary is a former BOND participant (has an end date), you can move forward and accept the referral.

- Go back to the Home Page and click on blue link called **“View Pending Referrals from the TtW Help Line”**
- Accept the referral.
- You will see a potential match screen just after accepting.
- Click the button **‘Update’**. Do NOT click the button next to the name shown as a potential match.

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 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 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.

	Name	Site	SSN
<input type="radio"/>	ruthie fake	ZZ - WIPA BOND	333-33-3333

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,
- The beneficiary dashboard, and
- The baseline assessment.

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 indicates that a BOND beneficiary is in your ETO site and needs to 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. Between “sweeps”, any records with the last name of Fake are not included in any of the reports.

If the BOND record initiated as a referral from the TtW Help Line, and was accepted into the WIPA site, follow the established procedure outlined in the *TtW Help Line – WIPA Referral Protocol Quick Reference Guide*. When sending the notification email to support@choosework.ssa.gov, be sure to use the email template and copy Laura Coffey ljcoffey@vcu.edu.