



Most Useful ETO Reports for TtW Help Line

August 2017

The Efforts to Outcomes (ETO) Data System contains several custom reports for Help Line Managers and Customer Service Representatives (CSRs). The available reports fall into three categories:

- Participant-Related Reports
- Management Reports
- Query Reports

Following is a description of each available custom report, how to access it, and how it is most useful to managers and CSRs.

Participant-Related Reports

Call Center Referrals Report (Enterprise Wide) – This report generates data about the total number of referrals processed, by status (total, pending, accepted, and rejected), to each WIPA project within a specified date range. Following is a partial example of the output of this report:

**Call Center Referrals Report
Enterprise Wide**
1/1/16 - 2/1/16

Accepted	<i>Average time in pending status: 5 Days</i>	1,693
Rejected	<i>Average time in pending status: 5.5 Days</i>	123
Total Number of Referrals Sent By Call Center	<i>Average time in pending status: 8.12 Days</i>	2,099

Site	Total	Accepted	Rejected	Pending	Avg in Pending
Abilities Inc. of Florida	36	32	1	3	2
Abilities Inc. of New York	32	25	6	1	2.6
Ability Connection of Colorado	39	36	2	1	3
Advocacy Center	21	19	1	1	0
AHEDD	27	26	1	0	3.57
ARCIL	23	23	0	0	1.5
Arizona Bridge to Independent Living	40	37	1	2	2.5
Aspire Indiana	19	18	0	1	2
BenePLAN/University of Massachusetts Medical	18	18	0	0	1.5
Black Hills Special Services Corp.	3	3	0	0	4
Brevard Achievement Center	35	29	3	3	5
CBFL/Houston Center of Independent Living	35	15	2	18	6.1
Center for Accessible Living	26	20	3	3	5.9

Enterprise Wide Referrals

To create and access this report use the following steps:

- From the Home Page, click on Reports on the right side navigation bar, and select View Reports (NEW).
- When the page refreshes, select 'Call Center Referrals Report (Enterprise Wide)'.
- A new window will open and you can select the start and end dates you want the report to display; hit 'Run Query', and the report will generate.

(Note: You will typically run this report from the first of a month through the first of the next month. The report is set to begin at midnight and end at midnight, so to get a full month of data, you will need to use the first of the next month as an end date; for example: 1/1/16 – 2/1/16)

Management Reports

Beneficiaries and Referrals Added to the Call Center in a Date Range – This report generates data in the following headings:

- Case Number
- Beneficiary Added/Updated – This column displays the date the beneficiary record was added or most recently updated.
- Staff Adding/Updating – This column indicates the name of the staff person who added a new record. In situations where updates to beneficiary demographics are made, but no new referral processed, the name of the person who made the original referral will be displayed.
- Referral Date – Shows the date of the original referral.
- Action Taken - This column indicates the receiving WIPA's action, including: accepted, rejected with reason, or pending.
- Follow-up Action Required – This column will show 'yes' or 'no' only for specific situations.
 - A 'yes' means that the referral was rejected and follow-up action is required.
 - A 'no' indicates the referral is still pending, or, the original referral was rejected AND a subsequent referral was made and accepted.
- Site To – Indicates the WIPA site receiving the referral.

The data displayed in this report shows all beneficiaries added or updated, and referred/not referred within the selected date range. The report has several built-in color codes to allow quick identification of potential issues or follow-up actions required.

- Red highlighted fields indicate no referrals made for a newly added beneficiary.
- Orange highlighted fields indicate multiple referrals made for the same beneficiary on the same day.
- Yellow highlighted fields indicate referrals made to an improper site (ZZ designation). **Note:** There may be some yellow highlighted fields indicated for records with beneficiary

demographics updated within the date range, with referrals in the past. NO follow up is required in this case.

- **Bold red font** indicates follow-up action is required. The following conditions will trigger this color code:
 - Referral rejected for reason of 'Incorrect WIPA' or 'Outside WIPA Service Area', AND
 - A subsequent referral was not made and accepted, AND
 - Another referral was not made on the same day, to a different WIPA.
 - **Note:** All conditions above must be true.
- **Bold orange font** also indicates follow-up action is required. The following conditions will trigger this color code:
 - Referral rejected for reason of 'Other', AND
 - A subsequent referral was not made and accepted, AND
 - Another referral was not made on the same day, to a different WIPA.
 - **Note:** All conditions above must be true.

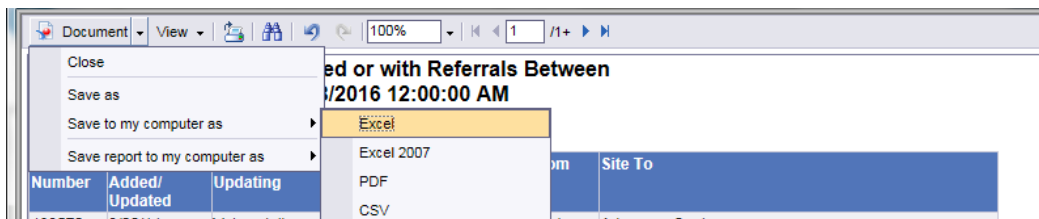
How this report can be useful:

- Spot checking for non-completed referrals
- Reviewing referral completion to proper WIPA sites (no ZZ-NAR, WIPA BOND, WIPA Admin, WIPA Training referrals made)
- Overall quality check on referrals

Exporting to Excel:

To sort and review the data in the report, it is highly recommended to export the report to an Excel file. Following are the steps to export:

- At the top left corner of the report, you will see the command ribbon,
- Click on the arrow next to 'Document',
- Scroll to 'Save to my Computer As' and click on the arrow,
- Scroll over to select 'Excel'.
- The report will export and then you can save it to your computer and sort as needed to review the data.

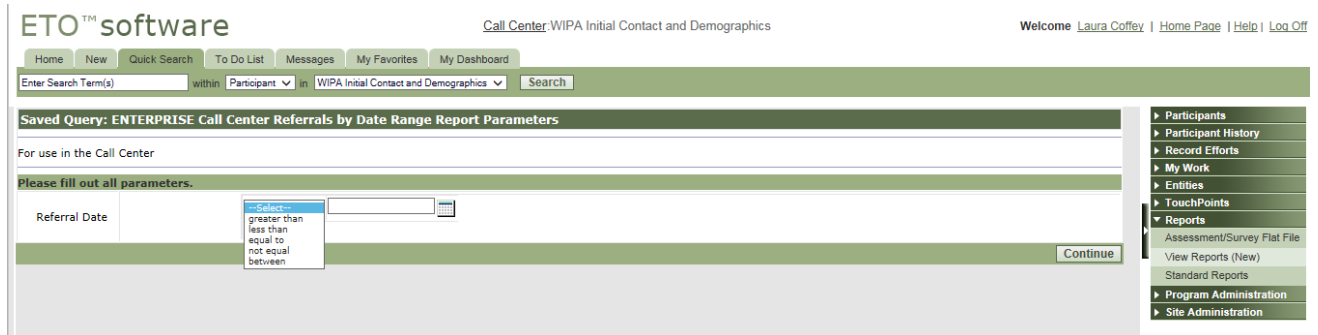


Query Reports

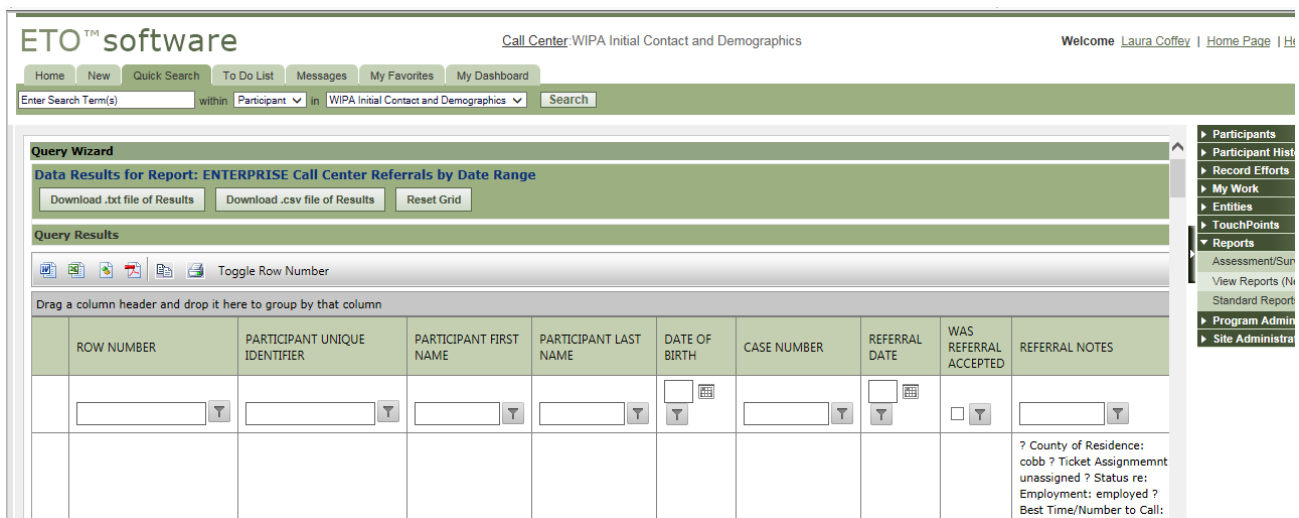
ENTERPRISE Call Center Referrals by Date Range – This report will provide all the details about all referrals generated in a selected date range. To create this report, follow the steps below:

- From the Home Page, click on Reports on the right side navigation bar, and select View Reports (NEW).

- When the page refreshes, scroll down to Query Reports, and select ENTERPRISE Call Center Referrals by Date Range.
- The page will refresh and you can select the parameters you want the report to display, then hit Continue.



- The report will generate and you are then able to scroll through all the referrals for the selected date range to view all the information about the referral.



- How this report can be useful:
 - Spot checking 'rejected' referrals, and reason for rejection
 - Reviewing referral notes for content and quality
 - Determining agent making referral to specific areas
 - Overall quality check on referrals
 - Troubleshooting issues identified from protocol emails sent by WIPAs (sent to support@choosework.ssa.gov For example: FAKE protocol, refer to TtW Help Line – WIPA Referral Protocol Quick Reference Guide)

Exporting to Excel

This query report is exported differently than the other reports. Click on the Excel icon just under Query Results. When the pop-up asks about saving or opening, click which option you want.

Query Wizard

Data Results for Report: ENTERPRISE Call Center Referrals by Date Range

Download .txt file of Results Download .csv file of Results Reset Grid

Query Results

Toggle Row Number

Drag a column header and drop it here to group by that column

ROW NUMBER	PARTICIPANT UNIQUE IDENTIFIER	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	DATE OF BIRTH	CASE NUMBER	REFERRAL DATE	WAS REFERRAL ACCEPTED	REFERRAL NOTES	REA
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	
								?This beneficiary was previously referred to prior WIPA that covered service area, possible ETO file transfer request can be made with beneficiary's permission.? County	

- Participants
- Participant H
- Record Effor
- My Work
- Entities
- TouchPoints
- Reports
- Assessment/S
- View Reports
- Standard Rep
- Program Adm
- Site Adminis

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