



# Ticket to Work Help Line - WIPA Referral Protocols: Transition Youth

August 2017

## Quick Reference Guide

### Quick Reference Guide – General Processes

Table 1: Quick Reference Guide: General Processes

General Processes	WIPA Action	TtW Help Line Action	WIPA ETO Steps
Referral generated by TtW Help Line	<ul style="list-style-type: none"> <li>View Pending Referrals in ETO to review TtW Help Line referrals</li> <li>Review the beneficiary’s referral information in ETO to identify transition-aged youth status. <b>The only indication that the beneficiary is a youth, other than checking DOB, will be in the ‘referral notes’ section of the Referral Details.</b></li> <li><b>Accept</b> or <b>reject</b> the referral in ETO.</li> </ul>	<ul style="list-style-type: none"> <li>No additional action at this point.</li> </ul>	<ul style="list-style-type: none"> <li>Review specifics of referral by viewing: <u>Participant Details data</u>: includes name, full address, phone number, DOB, gender, and marital status. <u>Referral Details data</u>: identified as TRANSITION YOUTH, reason for referral in ‘notes’ field, including county (zip code) of residence and employment status.</li> <li><b>Verify beneficiary is in your WIPA service area.</b></li> <li><b>Check ETO for beneficiary already enrolled in WIPA or BOND.</b></li> <li><b>Accept</b> or <b>reject</b> referral.</li> </ul>
Referral accepted	<ul style="list-style-type: none"> <li>Begin attempts to contact beneficiary or representative payee.</li> </ul>	<ul style="list-style-type: none"> <li>No additional action needed</li> </ul>	<ul style="list-style-type: none"> <li>Record efforts documenting services delivered as needed.</li> </ul>

General Processes	WIPA Action	TtW Help Line Action	WIPA ETO Steps
Referral rejected – ‘Out of Service Area’ or ‘Incorrect WIPA’	<ul style="list-style-type: none"> <li>No additional action at this point</li> </ul>	<ul style="list-style-type: none"> <li>Automatic email received - <b>‘rejected’</b>.</li> <li>Contact the beneficiary to alert them of the revised referral</li> <li>Re-refer the individual to the proper WIPA project <u>within two business days</u>.</li> </ul>	<ul style="list-style-type: none"> <li>Reject the referral in ETO and select reason as: ‘Out of Service Area’ or ‘Incorrect WIPA’.</li> </ul>
Referral rejected – ‘Already Enrolled in WIPA’ project	<ul style="list-style-type: none"> <li>Review referral notes for beneficiary’s communicated needs.</li> <li>Attempt contact with beneficiary <u>within 5 business days</u></li> </ul>	<ul style="list-style-type: none"> <li>No additional action at this point</li> </ul>	<ul style="list-style-type: none"> <li>Reject the referral in ETO and select reason as: ‘Already Enrolled in this WIPA’.</li> </ul>

## Quick Reference Guide – Handling Referral Issues

Table 2: Quick Reference Guide - Handling Referral Issues

Handling Referral Issues	WIPA Action	TtW Help Line Action	WIPA ETO Steps
WIPA unable to connect with beneficiary or rep-payee after multiple attempts OR beneficiary declines services.	<ul style="list-style-type: none"> <li>Remove the beneficiary by changing the last name to “Fake”.</li> <li>Contact the TtW Help Line via email <a href="mailto:support@choosework.ssa.gov">support@choosework.ssa.gov</a> to inform them of the situation. <b>Use email template to TtW Help Line.</b></li> </ul> <p><b>Note:</b> Beneficiary information included in email includes ONLY:</p> <ul style="list-style-type: none"> <li>Date of original referral</li> <li>WIPA project name</li> <li>First name of beneficiary</li> </ul>	<ul style="list-style-type: none"> <li>Update beneficiary notes in iTOPSS to reflect that WIPA has removed the beneficiary by changing the last name to “Fake”.</li> </ul>	<ul style="list-style-type: none"> <li>Change beneficiary last name to “Fake”.</li> <li>Do not dismiss the record.</li> </ul>

Handling Referral Issues	WIPA Action	TtW Help Line Action	WIPA ETO Steps
	<ul style="list-style-type: none"> <li>• First initial of beneficiary's last name</li> <li>• Reason for removing referred beneficiary from ETO system (unable to contact)</li> </ul>		
Beneficiary or rep-payee re-contacts the TtW Help Line	<ul style="list-style-type: none"> <li>• Continue contact attempts after notification from TtW Help Line that beneficiary re-contacted</li> </ul>	<ul style="list-style-type: none"> <li>• Review the beneficiary's referral status /date information on the beneficiary dashboard in ETO.</li> <li>• Update ETO with changes in phone, address, email if appropriate.</li> <li>• Initiate email with WIPA to confirm the 'accepted referral' status and the WIPA project's plans to continue contact efforts with the beneficiary. <b>Use email template to WIPA</b> <b>Note:</b> Beneficiary information included in email includes ONLY: <ul style="list-style-type: none"> <li>• Date of original referral</li> <li>• First name of beneficiary</li> <li>• First initial of beneficiary's last name</li> <li>• Name of TtW Help Line specialist initiating the original referral</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Search for participant using "View/Edit Beneficiary" link on the Home Page.</li> <li>• Carefully note the program in which the person is enrolled (I&amp;R or WIPA).</li> <li>• Continue contact attempts with beneficiary and note efforts in appropriate program (I&amp;R or WIPA Services).</li> <li>• If beneficiary had been "Faked", open the demographics form and change the name back to the original last name.</li> <li>• Click on the "Audit Report" button at the top of the demographics page to see the prior name information.</li> <li>• Initiate contact attempts with beneficiary, and continue necessary services.</li> </ul>
Referral accepted, later discovered that youth is not eligible (not receiving Social Security benefit based on disability).	<ul style="list-style-type: none"> <li>• Remove the beneficiary by changing the last name to "Fake".</li> <li>• Contact the TtW Help Line via email <a href="mailto:support@choosework.ssa.gov">support@choosework.ssa.gov</a> to inform them of the situation. <b>Use email template to TtW Help Line.</b> <b>Note:</b> Beneficiary information included in email includes ONLY: <ul style="list-style-type: none"> <li>• Date of original referral</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Update beneficiary notes in iTOPSS to reflect that WIPA has removed the beneficiary by changing the last name to "Fake".</li> <li>• Make additional note that beneficiary not WIPA-eligible.</li> </ul>	<ul style="list-style-type: none"> <li>• Change beneficiary last name to "Fake".</li> <li>• Do not dismiss the record.</li> </ul>

Handling Referral Issues	WIPA Action	TtW Help Line Action	WIPA ETO Steps
	<ul style="list-style-type: none"> <li>• WIPA project name</li> <li>• First name of beneficiary</li> <li>• First initial of beneficiary's last name</li> <li>• Reason for removing referred beneficiary from ETO system (ineligible for WIPA)</li> </ul>		
Referral accepted, later discovered that beneficiary already being served by WIPA	<ul style="list-style-type: none"> <li>• Select the file you wish to work with and ignore the other file(s).</li> <li>• Establish contact with the beneficiary within five business days</li> </ul>	No additional action at this point.	<ul style="list-style-type: none"> <li>• Notify your manager of case number of duplicate file.</li> <li>• WIPA managers – merge duplicate records monthly.</li> </ul>
Referral ACCIDENTALLY rejected	<ul style="list-style-type: none"> <li>• Contact the TtW Help Line via email <a href="mailto:support@choosework.ssa.gov">support@choosework.ssa.gov</a> to inform them of the situation. Use email template to TtW Help Line.</li> </ul> <p>Note: Beneficiary information included in email includes ONLY:</p> <ul style="list-style-type: none"> <li>• Date of original referral</li> <li>• WIPA project name(as it appears in ETO)</li> <li>• First name of beneficiary</li> <li>• First initial only of beneficiary's last name</li> <li>• Explanation that you accidentally rejected the referral and request immediate re-referral</li> </ul>	<ul style="list-style-type: none"> <li>• Re-refer the beneficiary to the WIPA site ASAP.</li> <li>• Be sure to include the referral notes transmitted with the original referral.</li> </ul>	<ul style="list-style-type: none"> <li>• Accept the re-referral.</li> <li>• Begin attempts to contact the beneficiary within 5 business days.</li> </ul>

- For questions pertaining to technical issues: Contact the ETO Help Desk at 855-816-0890 or [support@wipaccess.com](mailto:support@wipaccess.com)
- For questions or issues pertaining to a beneficiary referral, such as questions regarding the beneficiary data notes, assistance in re-referring a beneficiary when the referral is erroneously rejected, inaccurate email communications and similar concerns: Contact the TtW Help Line at [support@choosework.ssa.gov](mailto:support@choosework.ssa.gov)

- For technical assistance on this guidance, related materials, and accurately entering data into ETO: Contact Laura Coffey, TtW Help Line Training Coordinator, at 502-479-5865 or [ljcoffey@vcu.edu](mailto:ljcoffey@vcu.edu)

### **Email Template: Ticket to Work Help Line Follow-up with WIPA (TY Re-contact)**

Per instruction in the Ticket to Work Help Line-WIPA Referral Protocol – Transition Aged Youth document, any time that a beneficiary re-contacts the Ticket to Work Help Line regarding a referral previously made to the WIPA, you must initiate an email to the WIPA project to verify that they will continue to attempt to contact the beneficiary. Please address the email to the designated WIPA contact person and copy Laura Coffey at [ljcoffey@vcu.edu](mailto:ljcoffey@vcu.edu).

NEVER include any PII in the email to the WIPA project. The only information that should be included in the email is:

- Date of original referral;
- First name of beneficiary;
- First initial of beneficiary's last name; and
- Name of Ticket to Work Help Line specialist initiating the original referral.

#### **PLEASE USE THE FOLLOWING TEMPLATE:**

Dear *\_(insert WIPA name)\_*,

On *\_(insert referral date)\_*, *\_(insert beneficiary first name and last name initial)\_* was referred to your project by *\_\_(insert referring Ticket to Work Help Line Specialist name)\_\_*.

*(Insert beneficiary first name and last name initial)* re-contacts the Ticket to Work Help Line regarding the referral made to your agency. The beneficiary stated that *\_(insert what beneficiary said)\_\_\_*. I am writing to verify that you will continue attempts to contact this beneficiary within 5 business days. Please let me know if you have any questions. Thank you for your prompt attention to this matter.

#### **EXAMPLE:**

*Dear Sally CWIC,*

*On 9/30/2011, Jason P. was referred to your project by Wally at the Ticket to Work Help Line.*

*Jason re-contacted the Ticket to Work Help Line today regarding the referral made to your agency. He stated that he had lost the WIPA number, and he starts his new job on Monday. He has questions about his benefits. I am writing to verify that you will continue attempts to contact Jason within five business days. Please let me know if you have any questions. Thank you for your prompt attention to this matter.*

*Wanda - Ticket to Work Help Line 866-948-7842*

### **Email Template: WIPA Follow-up with Ticket to Work Help Line (Removal – Fake)**

Per instruction in the TtW Help Line-WIPA Referral Protocol – Transition Aged Youth document, any time you remove a referred beneficiary from the ETO database by changing the name to ‘Fake’, you must initiate an email to the Help Line to notify them of the beneficiary removal. Please address the email to the TtW Help Line at [support@chooseworkttw.net](mailto:support@chooseworkttw.net), and copy Laura Coffey at [lcoffey6@hotmail.com](mailto:lcoffey6@hotmail.com).

NEVER include any PII in the email to the Help Line. The only information that should be included in the email is:

- Date of original referral;
- WIPA project name;
- First name of beneficiary;
- First initial of beneficiary’s last name; and
- Reason for removing referred beneficiary from ETO system (unable to contact, services declined, referral accidentally accepted but is out of service area).

#### **PLEASE USE THE FOLLOWING TEMPLATE**

On \_(insert removal date)\_, \_(insert beneficiary first name and last name initial)\_ was removed from \_(insert WIPA project name)’s\_ ETO database. \_(insert beneficiary first name and last name initial)\_ was originally referred to us on \_(insert referral date)\_.

We have removed the beneficiary from our ETO site for the following reason: (choose appropriate reason below)

- We accepted the referral and later discovered that our WIPA project is already serving the beneficiary.

Please let me know if you have any questions. Thank you.

#### **EXAMPLE:**

*On 12/30/2014, Jason P. was removed from ABC WIPA's ETO database. Jason P. was originally referred to us on 12/4/2014.*

*We have removed the beneficiary from our ETO site for the following reason:*

- We accepted the referral and later discovered that our WIPA project is already serving the beneficiary.*

*Please let me know if you have any questions. Thank you.*

*Sally CWIC*

*ABC WIPA agency*