



# Ticket to Work Help Line – WIPA Referral Protocol

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## **Background Information**

Social Security established the Ticket to Work (TtW) Help Line to process and respond to beneficiary inquiries related to work and employment services and supports. The TtW Help Line uses trained Customer Service Representatives (CSRs) to help beneficiaries make informed decisions about using their Tickets, and identify the appropriate State Vocational Rehabilitation Agency (SVRA) and Employment Network (EN) that can best meet their employment needs. In addition, Help Line CSRs provide basic information to help beneficiaries understand the SSI and SSDI programs, Social Security's work incentives, and the effects of earnings from work on cash benefits and health care coverage, including Medicare and Medicaid.

The services delivered by the Help Line do not replace WIPA services. Instead, the Help Line functions as an intermediary service, screening and refining referrals to WIPA projects to ensure that beneficiary referrals are appropriate.

## **Ticket to Work Help Line Screening and Referral of Eligible Beneficiary Callers to WIPA Projects**

Help Line CSRs will screen all beneficiaries with inquiries about work incentives to determine the following:

- The beneficiary meets the eligibility criteria for WIPA services;
- The beneficiary is working, has a job offer pending, is interviewing, or is a transition-age youth or veteran; and
- The beneficiary has a need for and an interest in receiving WIPA services.

As part of the process of screening and initiating referrals to WIPAs, Help Line CSRs will:

- Enroll beneficiaries into the Efforts To Outcomes (ETO) Information & Referral (I&R) program;
- Collect I&R intake information; and

- Record referral notes. Information on Ticket status and the beneficiary's county of residence is included in the referral notes.

When it is determined that a beneficiary is (1) eligible for WIPA services, (2) meet's Social Security's priority categories for referral, and (3) has a desire for more intensive, individualized services, the CSR will generate a referral in ETO to the WIPA serving the beneficiary's place of residence. The Help Line CSR will provide information to the beneficiary about the protection and use of personally identifying information (PII) that they will share with the WIPA in the referral process and will obtain the beneficiary's consent prior to sending this information.

## **Guidance for WIPAs on Viewing and Taking Action on Help Line Referrals**

Once a Help Line CSR makes a referral to a WIPA project via ETO, an email is automatically generated notifying the WIPA project of the referral. A designated WIPA staff person receives the referral notifications.

- Only one person may serve as the designated point of contact for each WIPA project to receive the email notifications. WIPA projects may change the staff person serving as the point of contact. To request a change in designated point of contact, please send that request in writing to your Social Security project officer.
- To request assistance with any difficulties in receiving the automatic email notices, please submit your specific request or question to the ETO Help Desk at [support@wipaccess.com](mailto:support@wipaccess.com) or [855-816-0890](tel:855-816-0890).

In addition to the email notification, WIPA Projects can access new referrals in ETO from the "View Pending Referrals" link on the *Initial Contact & Demographics (I&R program)* homepage. While only the designated WIPA project person will receive the email notification that a referral has been made, any staff person with an ETO account for that WIPA may log into ETO, review the pending referrals, and take action by 'accepting' or 'rejecting' the referral.

For all Help Line referrals received, WIPA Projects are required to (1) review the beneficiary's referral information and participant details in ETO for appropriateness and, (2) either 'accept' or 'reject' the referral within two business day of receipt of the referral.

Given the two business day timeframe for taking action on referrals, it is essential that WIPA projects arrange for staff to check the "View Pending Referrals" in ETO daily. This is particularly important when the designated contact person will be out of the office for one or more days. When assigning staff to view and take action ('accept' or 'reject') on referrals, project managers need not be concerned with case assignment and management issues. The WIPA staff member who 'accepts' or 'rejects' the referral does not necessarily have to retain the case. Instead, once accepted, the WIPA Project Director can assign the case to any staff person.

WIPA Projects should not contact the beneficiary prior to taking action on the referral ('accepting' or 'rejecting' the referral). Instead, the appropriate protocol is; (1) review the beneficiary's referral information in ETO for appropriateness, (2) 'accept' or 'reject' the referral in ETO, and (3) after accepting the referral, initiate contact with the beneficiary. Each time a referral is either 'accepted' or 'rejected', the ETO system will automatically send an email notification to the Help Line staff.

## **Access to Beneficiary Data to Support the Accept / Reject Decision**

In most instances, WIPAs will have access to sufficient beneficiary referral data in ETO to support an initial decision whether to 'accept' or 'reject' the referral. The referral data available to WIPAs at this point in the process includes:

Participant Details data: includes name, full address, phone number, DOB, gender, and marital status.

Referral Details data: reason for referral is in the 'notes' field, including county of residence and Ticket status.

While the TtW Help Line staff will make every effort to provide all of the information cited above on each beneficiary referred, it is important to note that their ability to do so is subject to the beneficiary's willingness to share this information. In some instances, the TtW Help Line CSR may not be able to collect all of the information from the beneficiary, and / or the beneficiary may not provide consent for the TtW Help Line CSR to share all of the data with the WIPA project. In such instances, the Help Line staff will inform the WIPA project of any limitations on collecting or sharing beneficiary data by including a statement to this effect in the ETO 'notes' field.

While the protocol requires 'accepting' or 'rejecting' a referral prior to contacting the beneficiary, in limited situations where the referral information shared on a particular beneficiary is not complete, it may be necessary for the WIPA project to contact the beneficiary to gather additional data to support an 'accept' decision.

## **Confirming the Beneficiary Referred is Within Your WIPA Service Area and Not Previously Enrolled**

To determine the appropriateness of a particular TtW Help Line referral, WIPA staff must verify that the beneficiary referred is within their service area by reviewing the address data under the "participant details" link, as well as the county of residence information in the I&R Referral Notes box under the "referral details" link.

In instances where the Help Line has referred a beneficiary to an incorrect WIPA project (i.e., the beneficiary resides outside of their service area), the WIPA project will reject the referral in

ETO and select the “Out of Service Area” or “Incorrect WIPA” option in the drop down menu as the reason for rejecting. Once the WIPA has ‘rejected’ the referral, an automatic email notification to the TtW Help Line indicates that the referral has been ‘rejected’. Upon receiving this notification, the Help Line CSR will contact the beneficiary to alert them of the revised referral and re-refer the individual to the proper WIPA project within two business days.

In addition to confirming that a new beneficiary referral resides within their service area, WIPAs will also need to check in ETO to verify that they have not previously enrolled the beneficiary. To check for previous enrollment, use the “Search for current WIPA and BOND participants” link on the homepage. You must enter the SSN of the beneficiary WITHOUT including spaces or dashes for the search to work correctly. If the beneficiary is already enrolled, the referral should be ‘rejected’ and the “already enrolled” option selected as the reason for the rejection.

### **Access to Additional Beneficiary Information in ETO Once the Referral is Accepted**

‘Accepting’ a Help Line referral essentially enrolls the beneficiary in the I&R program in ETO. Once a WIPA project has ‘accepted’ a TtW Help Line referral, the WIPA will have the ability to access all of the beneficiary data collected by the Help Line CSR. This includes full I&R demographic data, as well as the original referral notes completed by the Help Line. However, you will need to access the “Call Center Referrals by Date Range” report to view the original referral notes. *Please refer to the ‘ETO Data Entry Guidance, Tips, and Reminders’ document for instructions on accessing the referral details completed by the Help Line after accepting the referral.*

### **Questions or Issues Related to TtW Help Line Referrals**

The TtW Help Line has a unique email account for WIPA projects to use in instances where questions or issues arise related to a beneficiary referral. The email address is: [support@choosework.ssa.gov](mailto:support@choosework.ssa.gov)

WIPAs should use this email address to communicate with the TtW Help Line only on issues pertaining to a beneficiary referral. This includes referral issues such as:

- Questions regarding the beneficiary referral notes,
- Assistance in re-referring a beneficiary when the WIPA erroneously rejects the referral, and
- Inaccurate email communications and similar concerns.

When sending an email to the TtW Help Line **do NOT include any PII**. Please use the guidance provided in the Quick Reference Guide and Email Template to communicate with the TtW Help Line. Do not use this email to inform the Help Line each time you ‘accept’ or ‘reject’ a referral

in ETO, as the Help Line will automatically receive an email indicating the outcome of the referral.

## **Guidance Pertaining to WIPA Service Delivery once a Help Line Referral is Accepted**

### **Establishing Contact with the Beneficiary**

Once a referral is 'accepted', the WIPA project will review the I&R demographic data completed by the TtW Help Line, then initiate contact with the beneficiary within five business days of the date of referral. To establish clear expectations and minimize confusion on the part of the beneficiary, TtW Help Line staff will advise the beneficiary to expect a contact from the WIPA project within this timeframe.

Over a period of five to ten business days, the WIPA project will attempt - a minimum of three times – to contact the beneficiary. If needed, multiple attempts to contact the beneficiary will be made using various means (telephone, e-mail, postal mail).

### **Situations in Which the WIPA is Unsuccessful in Contacting the Beneficiary**

WIPA projects may be unable to contact the beneficiary after multiple attempts within the five to ten business day period. In these instances, WIPAs should take the following actions:

1. Remove the beneficiary from the I&R program by locating the accepted referral and changing the beneficiary's last name to "Fake". Do NOT dismiss beneficiaries who are Faked.
2. Contact the TtW Help Line via email [support@choosework.ssa.gov](mailto:support@choosework.ssa.gov) and copy Laura Coffey [lcoffey@vcu.edu](mailto:lcoffey@vcu.edu) to inform them of the situation.

### **Situations in Which the WIPA is Unsuccessful in Contacting the Beneficiary and the Beneficiary Re-contacts the TtW Help Line**

In instances where the WIPA project has been unsuccessful in contacting the beneficiary, it is likely that the beneficiary may contact the Help Line once again. If a beneficiary does in fact re-contact the TtW Help Line, the CSR will take the following actions:

1. Review the beneficiary's referral status /date information on the beneficiary's dashboard in ETO.
2. Update beneficiary's phone, email, or address in ETO as needed.
3. Screen for the beneficiary's proximity to work based on the referral priorities.

4. Initiate an email contact with the designated contact person to confirm the 'accepted referral' status and the WIPA project's plans to continue contact efforts with the beneficiary.

## **Situations in Which the Beneficiary Declines Services Following an Accepted Referral**

In instances where a referral is accepted, and the beneficiary declines services once contacted, the WIPA project will take the following actions:

1. Remove the beneficiary from the I&R program by locating the accepted referral and changing the beneficiary's last name to "Fake."
2. Contact the TtW Help Line via email [support@choosework.ssa.gov](mailto:support@choosework.ssa.gov) and copy Laura Coffey [lcoffey@vcu.edu](mailto:lcoffey@vcu.edu) to inform them of the situation.

## **Discovering the Beneficiary is Outside the Service Area after the Referral is Accepted**

In some instances, a WIPA project may 'accept' a referral and then after contacting the beneficiary, discover that the individual resides outside of their service area. In such instances, the WIPA project will explain the situation to the beneficiary and request their approval to contact the TtW Help Line, so that they may be referred to the appropriate WIPA project. Once agreed to by the beneficiary, the WIPA project will need to complete the following steps:

1. Locate the referral accepted and change the beneficiary's last name to "Fake."
2. Contact the TtW Help Line via email [support@choosework.ssa.gov](mailto:support@choosework.ssa.gov) and copy Laura Coffey [lcoffey@vcu.edu](mailto:lcoffey@vcu.edu) to inform them of the situation.

The TtW Help Line will refer the beneficiary to the correct WIPA project in ETO within two business days of the contact from the WIPA and contact the beneficiary once again to inform them of this action. Finally, the TtW Help Line will close the loop by emailing the WIPA project to advise them that they have taken corrective action.

## **Entering Data on Services Provided to Help Line Referred Beneficiaries**

As explained earlier, WIPA staff will have access to limited beneficiary information prior to 'accepting' the referral. Once a WIPA project has 'accepted' a referral, staff will have the ability to access all of the beneficiary data collected by the TtW Help Line.

'Accepting' a TtW Help Line referral essentially enrolls the beneficiary in the WIPA project's I&R program in ETO. Once 'accepted', WIPA staff may view and update all of the I&R demographic data collected by the Help Line as needed.

In the vast majority of cases, beneficiaries referred by the TtW Help Line to a WIPA will be individuals with a need for and an interest in receiving intensive, individualized WIPA services as quickly as possible. You should begin establishing contact with the beneficiary immediately after accepting the referral and record efforts as appropriate. As soon as you have determined that the beneficiary wants and needs individualized services, and you have begun delivering individualized services, dismiss the beneficiary from I&R and enroll them immediately in WIPA services. Once enrolled in WIPA services, it will be necessary to complete a baseline assessment.

## **Where to Go for Additional Assistance**

In closing, the protocols outlined above set clear expectations and provide guidance to both WIPA project staff and TtW Help Line CSRs to ensure that this relationship will improve the quality and accuracy of services for beneficiaries. Please remember to refer any questions to the following entities:

- For questions pertaining to technical issues, such as accessing ETO data, contact: WIPA ETO Help Desk at [support@wipaccess.com](mailto:support@wipaccess.com) or 855-816-0890.
- 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; or for technical assistance on this guidance and related materials:  
Please contact Laura Coffey, TtW Help Line Training Coordinator, at 502-479-5865 or [ljcoffey@vcu.edu](mailto:ljcoffey@vcu.edu)