



Ticket to Work Help Line - WIPA Referral Protocols

Quick Reference Guide - 2017

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"> View pending referrals in ETO to review TtW Help Line referrals. Accept or reject referral based on beneficiary information and notes <u>within 2 business days</u> of receipt of referral. 	No additional action at this point.	<ul style="list-style-type: none"> 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>: reason for referral in 'notes' field, including county (zip code) of residence and Ticket status. Verify beneficiary is in your WIPA service area. Check for beneficiary already enrolled in WIPA or BOND.
Referral accepted	<ul style="list-style-type: none"> Attempt contact with beneficiary <u>within 5 business days.</u> Make a minimum of 3 attempts to contact. 	No additional action at this point.	<ul style="list-style-type: none"> Accept the referral in ETO. Initiate contact with beneficiary.
Referral rejected – 'Out of WIPA Service Area' or 'Incorrect WIPA'	No additional action at this point.	<ul style="list-style-type: none"> Automatic email received - 'rejected'. Contact the beneficiary to alert them of the revised referral. 	<ul style="list-style-type: none"> Reject the referral in ETO and select reason as: 'Out of WIPA Service Area' or 'Incorrect WIPA'.

General Processes	WIPA Action	TtW Help Line Action	WIPA ETO Steps
		<ul style="list-style-type: none"> Re-REFER the individual to the proper WIPA project <u>within two business days</u>. 	
Referral rejected – ‘Already Enrolled with WIPA’ project	<ul style="list-style-type: none"> Attempt contact with beneficiary <u>within 5 business days</u>. 	No additional action at this point.	<ul style="list-style-type: none"> Reject the referral in ETO and select reason as: ‘Already Enrolled with WIPA’
Referral rejected – ‘Other’	<ul style="list-style-type: none"> ONLY select ‘Other’ as a rejection reason if the beneficiary is active in BOND. Send an email explaining this to support@choosework.ssa.gov 	<ul style="list-style-type: none"> Email the WIPA to confirm the reason for selecting ‘Other’ as a rejection reason. Note the iTOPSS record, or re-refer as appropriate based on reason given for rejecting as ‘Other’. 	

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 after multiple attempts	<ul style="list-style-type: none"> Remove beneficiary from ETO by changing last name to “Fake”. Contact the TtW Help Line via email support@choosework.ssa.gov to inform them of the situation. Use email template to TtW Help Line. <p>Note: Beneficiary information included in email includes ONLY:</p> <ul style="list-style-type: none"> Date of original referral WIPA project name (as in ETO) First name of beneficiary First initial of beneficiary’s last name 	<ul style="list-style-type: none"> Update beneficiary notes in iTOPSS to reflect that WIPA has removed the beneficiary by changing the last name to “Fake”. 	<ul style="list-style-type: none"> Remove from I&R program by changing the beneficiary’s last name to “Fake”. Do NOT dismiss!

Handling Referral Issues	WIPA Action	TtW Help Line Action	WIPA ETO Steps
	<ul style="list-style-type: none"> Reason for removing referred beneficiary from ETO system (unable to contact) 		
Beneficiary re-contacts the TtW Help Line	<ul style="list-style-type: none"> Review beneficiary’s reason for re-contact in email. Continue contact attempts after notification from TtW Help Line that beneficiary re-contacted. 	<ul style="list-style-type: none"> Review the beneficiary’s referral status /date information in the ETO report and in iTOPSS. Update ETO with changes in phone, address, email if appropriate. Initiate email with WIPA to confirm the ‘accepted referral’ status and the WIPA project’s plans to continue contact efforts with the beneficiary. Use email template to WIPA Note: Beneficiary information included in email includes ONLY: <ul style="list-style-type: none"> Date of original referral First name of beneficiary First initial of beneficiary’s last name Name of TtW Help Line CSR initiating the original referral When iTOPSS notes indicate the prior referral was removed (Fake), include the case number in your email to the WIPA, and note it had been Faked. 	<ul style="list-style-type: none"> Search for participant using “View/Edit Beneficiary” link on the Home Page. Carefully note which program the person is enrolled in (I&R or WIPA). Continue contact attempts with beneficiary and note efforts in appropriate program (I&R or WIPA Services). If beneficiary had been “Faked”, open the demographics form and change the name back to the original last name. Click on the “Audit Report” button at the top of the demographics page to see the prior name information. Initiate contact attempts with beneficiary, and continue necessary services.
Referral accepted, beneficiary declines services when contacted	<ul style="list-style-type: none"> Note: if you provided I&R services and then the beneficiary declined further services, do NOT remove the beneficiary, leave them active in I&R. 	No additional action at this point.	<ul style="list-style-type: none"> Remove from I&R program by changing the beneficiary’s last name to “Fake”.

Handling Referral Issues	WIPA Action	TtW Help Line Action	WIPA ETO Steps
	<ul style="list-style-type: none"> • Otherwise, remove the beneficiary from ETO by changing the last name to “Fake”. • Contact the TtW Help Line via email support@choosework.ssa.gov to inform them of the situation. Use email template to TtW Help Line Note: Beneficiary information included in email includes ONLY: <ul style="list-style-type: none"> • Date of original referral • WIPA project name • First name of beneficiary • First initial of beneficiary’s last name • Reason for removing referred beneficiary from ETO system (services declined) 		
<p>Referral accepted, later discovered that beneficiary is out of service area</p>	<ul style="list-style-type: none"> • Contact the beneficiary and request their approval to contact TtW Help Line, so that they may be referred to the appropriate WIPA project • Remove beneficiary from ETO by changing last name to “Fake”. • Contact the TtW Help Line via email support@choosework.ssa.gov to inform them of the situation Use email template to TtW Help Line Note: Beneficiary information included in email includes ONLY: <ul style="list-style-type: none"> • Date of original referral • WIPA project name • First name of beneficiary • First initial of beneficiary’s last name 	<ul style="list-style-type: none"> • Refer the beneficiary to the correct WIPA project within two business days of contact from the WIPA • Contact the beneficiary to inform them of this action. • Email the WIPA project to advise them that a corrected referral action is complete. Note: Beneficiary information included in email includes ONLY: <ul style="list-style-type: none"> • Date of original referral • First name of beneficiary • First initial of beneficiary’s last name • Name of TtW Help Line specialist 	<ul style="list-style-type: none"> • Remove from I&R program by changing the beneficiary’s last name to “Fake”.

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

- 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: Contact Laura Coffey, TtW Help Line Training Coordinator, at 502-479-5865 or ljcoffey@vcu.edu
- For questions pertaining to technical issues, accessing and entering data into ETO: 855-816-0890 or support@wipaccess.com

Email Template: Ticket to Work Help Line Follow-up with WIPA

Per instruction in the Ticket to Work Help Line-WIPA Referral Protocol 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.

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-contacts the Ticket to Work Help Line today regarding the referral made to your agency. He stated that he had not yet heard from anyone 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

Per instruction in the TtW Help Line-WIPA Referral Protocol 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@choosework.ssa.gov, and copy Laura Coffey at ljcoffey@vcu.edu.

NEVER include any PII in the email to the WIIRC. 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 were unable to contact the beneficiary following a minimum of three attempts.
- The beneficiary declined further services.
- We accepted the referral and later discovered that the beneficiary resides outside of our service area.

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

EXAMPLE:

On 9/30/2013, Jason P. was removed from ABC WIPA's ETO database. Jason P. was originally referred to us on 9/4/2013.

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

- o The beneficiary declined further services when we contacted them.*

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

Sally CWIC

ABC WIPA agency