



VCU

Work Incentives Planning and Assistance
National Training and Data Center

Uploading, Scanning, and Storing Documents in ETO

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WIPA projects now have the capability of saving and uploading documents directly into the remote Social Solutions servers. There will be four different types of documents: (1) those created on their secure government furnished computer and uploaded into ETO, (2) those created on a different computer that will be uploaded to the secure government furnished computer, (3) those that are received from other sources electronically and uploaded, and (4) those that are received from other sources in hard copy format and subsequently scanned and saved to the hard drive of the government furnished computer.

Important Note: The following guidance regarding beneficiary data is provided by the Social Security Office of Research, Demonstration, and Employment Supports:

CWICs should never enter files containing PII or beneficiary information into any other data base or computer. Please refer to the WIPA Terms and Conditions document regarding alternate data bases. ETO, used ONLY on the secure Government furnished computer, is the ONLY approved environment. The CWIC should not retain any beneficiary files, information, or PII in any other electronic environment.

Regarding new WIPA clients, we cannot prohibit paper files but once again, all rules and directives must be strictly followed regarding the maintenance of paper files and, at some point, we will once again require destruction of paper files.

There are no 'required' uploads. However, Social Security is eager to minimize paper records to the greatest extent possible and therefore we strongly encourage uploading pertinent documents. There are many reasons for this; the first is paper reduction and mitigating potential loss of files. Second, all information is in a secure environment. If there are paper files, the WIPA must follow all guidance and directives on maintaining paper files according to the cooperative agreement.

How to Upload Documents in ETO

CWICs can upload documents in both the I&R program and the WIPA services program. There are no limits to the number and/or frequency of documents that can be uploaded.

To upload a document in either the I&R or WIPA Program:

- Search for the participant
- Click on the beneficiary name and a box pops up
- Select 'View/Record TouchPoint'
- Select 'Take New TouchPoint'
- Select 'Upload File'
- Enter the date of the upload
- Name the file that you want to upload in the 'Identifier' box and hit 'Select' next to the File box; a new window will open to find the file on your computer to upload. Once you have located the file, double-click on it and it will be uploaded. Do not hit 'Save' until you see a green box and the file name displayed on your screen.
- Hit 'Save' once you see the file and a green square next to the file name. You will get a success pop-up indicating that your upload was submitted; hit 'OK'.

CWICs can also upload documents directly from the beneficiary dashboard by selecting the +New link in the 'Recent Files' section of the beneficiary dashboard. Once you click on the +New link, you will follow the same steps described above.

Transferring documents from other computers and sources to the Social Security laptop

Contact the ETO Technical Help Desk for assistance and procedures for transferring documents from other computers and sources to the Social Security laptop.