

WIPA RESOURCES GUIDE

We have many resources to help Work Incentive Planning and Assistance Projects (WIPA) provide accurate and timely services to beneficiaries. This document will help WIPA staff to understand the assistance available, and to know when and who to call with questions specific to your grant related needs. If, after reading this, you are uncertain about a specific question, call your Project Officer and we will provide guidance or direct you to the correct source for answers.

Office of Research, Demonstration and Employment Support (ORDES)

Each of your cooperative agreements is assigned a Project Officer from the ORDES. Social Security Project Officers are responsible for the programmatic elements of awards. The Project Officers are available to help you and to ensure that projects provide the services beneficiaries need.

The WIPA cooperative agreements are managed under the auspices of the Beneficiary Employment Support Branch (BESB). The BESB Team Leader is Carol Cohen. You can reach Carol via email – carol.cohen@ssa.gov

There are three WIPA Project Officers (POs) on the BESB team, each of whom has an assigned portfolio of projects:

Margery McIver Margery.McIver@ssa.gov 410-965-6878

Djuna Mitchell Djuna.Mitchell@ssa.gov 202-358-6009

Terri Uttermohlen Terri.Uttermohlen@ssa.gov 410-966-2082

Here are examples of issues that are appropriate to address with your PO:

- I need approval for a brochure, pamphlet or presentation;
- I need advice on providing outreach;
- I have questions about suitability;
- I have questions about the Terms and Conditions;
- What are Social Security's expectations for my project?
- How do I get a laptop, or an ETO PIN and password for new staff?
- What should I do when an employee who has access to ETO leaves the project?

- Does the information my project entered in ETO meet Social Security's expectations?
- Will insufficient or inaccurate ETO data entry affect the funding for our project?
- What happens if we do not meet benchmarks?
- A laptop has been lost, stolen, or damaged, what do I do?
- What are the progress report requirements for my project?
- I am not sure whom to contact about a particular issue, can you tell me?; and
- I have an issue with suitability and the eQIP system.

Office of Acquisitions and Grants (OAG)

OAG handles the financial aspects and budgeting questions for the WIPA cooperative agreements. The Grants Management Officers (GMOs) make the awards, approve budgets, and ensure that the awardees use funds as authorized.

There are three GMs, each with their own portfolio of awards:

Audrey Adams Audrey.Adams@ssa.gov 410-965-9469

Dionne Mitchell Dionne.Mitchell@ssa.gov 410-965-9534

Tonya Saunders Tonya.Saunders@ssa.gov 410-965-9501

Here are some examples of issues for the GMOs who work with your project:

- I need to make changes to my budget;
- What are the financial reporting responsibilities?
- We have billed Social Security but have not received payment. Can you help us with payment?; and
- I am having a problem accessing Grant Solutions. Can you help?

Contacting both ORDES and OAG

Since GMOs and POs are partners, at times the best action is to contact both for the same issue. You might contact your PO first and we will provide additional guidance if you also need to contact OAG. Here are examples of issues that both offices can address:

- What can I purchase with WIPA funds?
- My organization's name is changing, what do I do?
- I have hired new staff, where do I send the resumes?

- How do I handle staff that I have fired, staff that have retired or left the project?
- We purchased equipment with WIPA funds and the equipment is no longer functional; what do we do? Do we dispose of equipment or send it back and where do we send it?

Area Work Incentive Coordinators (AWIC) and Local Social Security Offices

Important partnerships WIPA projects should establish are the relationships with the local AWIC and the local Social Security offices. AWICs are valuable partners; Community Work Incentive Coordinators (CWIC) and WIPA managers should follow the AWIC's guidance about when and how to contact them, or when to contact local Social Security staff in the Field Office serving individual beneficiaries. AWICs are not involved directly with your cooperative agreement award or ETO. We strongly recommend reaching out to the local field offices and setting up a mutually convenient time for a meet and greet where representatives of the WIPA staff can explain about WIPA services, learn about the culture of the local field offices, and create a mutually supportive relationship. You can find the addresses for the field offices in your service area by visiting the socialsecurity.gov web site. For additional field office contact information, contact your Project Officer.

- A beneficiary has a problem with the local Social Security office;
- A beneficiary wants to write a PASS, but the CWIC needs clarification on documentation the AWIC will require;
- You or a beneficiary have a question about the Social Security record shown on the BPQY;
- A beneficiary is having difficulty obtaining a BPQY; and
- A beneficiary is having trouble reporting earnings.

You can find AWIC contact information on the appropriate Social Security web page:

- [Region 1 \(Connecticut, Massachusetts, New Hampshire, Rhode Island\)](#)
- [Region 2 \(New York, New Jersey, Puerto Rico, Virgin Islands\)](#)
- [Region 3 \(Delaware, Maryland, Pennsylvania, Virginia, West Virginia, District of Columbia\)](#)
- [Region 4 \(Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee\)](#)
- [Region 5 \(Illinois, Indiana, Michigan, Minnesota, Ohio, Wisconsin\)](#)
- [Region 6 \(Arkansas, Louisiana, New Mexico, Oklahoma, Texas\)](#)
- [Region 7 \(Iowa, Kansas, Missouri, Nebraska\)](#)
- [Region 8 \(Colorado, Montana, North Dakota, South Dakota, Utah, Wyoming\)](#)
- [Region 9 \(Arizona, California, Hawaii, Nevada\)](#)
- [Region 10 \(Alaska, Oregon, Washington, Idaho\)](#)

Virginia Commonwealth University National Training and Data Center (VCU-NTDC)

Social Security awarded a contract to Virginia Commonwealth University to continue to provide technical assistance about federal benefits and work incentives to WIPA grantees. We awarded the contract on July 17, 2015. VCU will continue to provide training, CWIC certification and technical assistance through July 16, 2020, pending availability of funding. Under the new contract, VCU is responsible for the security and software management, distribution and technical support for the Government furnished laptops, as well as providing training and technical support for the Efforts to Outcomes (ETO) database. VCU has a team of technical liaisons to support WIPA staff. You can find information about VCU's technical assistance services and all of the Technical Liaisons at vcu-ntc.org.

In addition to VCU's Regional TA Liaisons, the NTDC has a designated technical liaison specifically for ETO and the TtW Help Line. Here are some questions appropriate for Laura Coffey, VCU's ETO and TtW Help Line Technical Liaison:

- How do I accept or decline a Help Line referral? What are the next steps?
- When should a contact with a beneficiary be entered into ETO?
- When is it appropriate to enter an individual into the Information and Referral (I&R) part of ETO;
- When do I dismiss people from I&R and move them to WIPA?
- When do I complete a baseline assessment?
- When do I complete a follow-up assessment?

- What is an 'effort'?

- What is the difference between a follow-up assessment and an effort;
- How do I capture the work incentive advice I just provided to a beneficiary in ETO?
- When is it appropriate to use the case notes feature in ETO?
- How do I record a completed Benefits Summary and Analysis (BS&A) or a Work Incentives Plan (WIP)?
- How do I perform ETO functions such as Efforts, Assessments, To Do Lists, and Dismissals?

- I need help troubleshooting ETO such as locating a beneficiary who I cannot find; and

- How do I generate a report in ETO?
- What report(s) will help me find information for the benchmarks and staff performance?
- How do I monitor my project's performance?

On December 7, 2015, Abt Associates, as a subcontractor to Virginia Commonwealth University, assumed responsibility for the role previously held by BASS of operating the

WIPA Technical Help Desk. The WIPA Technical Help Desk manages technical support for secure laptop computers and the Efforts to Outcomes (ETO) database. You may contact the technical help desk at 855-816 0890, or via email at support@wipaccess.com from 9am – 5pm Eastern.

Here are some issues appropriate for the WIPA Technical Help Desk:

- My ETO password and/or username are not working;
- Can I access my agency network with my laptop?
- Can you help me load a driver for my printer?
- I lost my ETO password; can you help me reset it?
- I use adaptive technology. Can you help me with the interface?
- How do I upload documents into ETO?
- How do I log into ETO?
- How do I change the program enrollment date?

When in doubt call your ORDES Project Officer! We are happy to provide support and direction to ensure the WIPA program staff have all the information they need.