

Requirements for BOND-Related Changes to WIPA/ETO Subsequent to OMB #0960-0629

1) Formatting and Numbering of Instructions on the I&R and Assessment Screens

The instructions in the alert text are automatically populated and inform users if they are working with a BOND participant and the participant's assigned treatment group. Due to unexpected problems with the software, we are not able to make the alert text appear in WIPA/ETO as we originally planned. As a result, we need to reformat the alert text to be displayed with new numbering in the I&R and all three Assessment screens.

An example of the previous I&R screen and our notes from OMB # 09600629 (1/18/11) are below:

Previous Example I&R Screen and Notes from OMB # 09600629 (1/18/11)

Take Assessment for Smith, Ernest on Nov 9 2010

I&R Assessment.

Section A. Inquiry Information

This beneficiary is in BOND and eligible for the benefit offset. If your agency is not a BOND provider, please assist the beneficiary to contact BOND Central Operations at 617-520-2880 or BONDCentralOps@bondssa.org to find out where the beneficiary may receive BOND services.

A-1. Topic of Inquiry

- Benefits
- Work Incentives
- WIPA Services
- Non-WIPA Services
- Employment
- Education

A-5. Resolution of I & R Contact

- Basic Info Needed
- Analysis and Advisement Needed
- Work Incentives Assistance Needed
- Referred to CWIC for Appointment
- Referred to Other Services Agency

A-7. Time Spent (minutes):

A-8. BOND Treatment Group T1-WIC

Instructions for Treatment Group T1 and automated Treatment group indicator added to the I&R Assessment Screen. The instruction and treatment group indicator will only appear if beneficiary is a BOND participant

Four examples of the required changes are provided below. Two versions of the I&R screens illustrate the changes for the I&R screens for T1-WIC Treatment Group (Example 1) and the Not a BOND Participant option (Example 2). The remaining two versions of the screens illustrate the changes to the baseline assessment for Treatment Group T1-WIC (Example 3) and for the Not a BOND Participant option (Example 4.) The changes to the remaining I&R, baseline, follow-up assessment and summary screens are the same. The changes to the screens are:

- **BOND Participant Treatment Status Reformatting.** As before, the text of the BOND alert is in the box for Section A. For BOND participants, the treatment group information is now labeled as A-1 – A-4, depending upon the beneficiary’s assigned treatment group. In Example 1 below, treatment group T1-WIC is numbered A-2. A-5 is now the Treatment Group indicator.
- **BOND Participant Treatment Status Alert Text.** For BOND participants, some of the alert text is changed. BOND requested that we change their alert text and instructions to include only one phone number and eliminate the e-mail address. The text “Please assist the beneficiary to contact BOND Central Operations at 617-520-2880 or BOND Central Ops@bondssa.org to find out where the beneficiary may receive BOND services. “ was removed from some alerts and all of the alert text is now consistent and instructs “Contact the BOND Call Center toll-free at 1-877-7BOND09 (1-877-726-6309) to find out where the beneficiary may receive BOND services” (Example 2).
- **BOND Nonparticipants Formatting and Instructions.** Previously there was no text indicating the BOND status of a beneficiary who is not participating in BOND; Section A was blank in this case. Due to the limitation of the software, the screen now displays text indicating that the beneficiary is not a BOND participant. This text is not numbered, but now the following sections are renumbered (Example 2). For the assessment screens, the instruction in Section A for BOND nonparticipants is to proceed with standard WIPA services (Example 4). Because the alert field is no longer blank for nonparticipants, instruction is provided to prevent confusion.
- **Renumbering Sections and Questions.** The following sections, such as Inquiry Information in the I&R screen is now Section B and Topic of Inquiry starts with numbering at B1, and all subsequent sections following sequence. The same is the case for Examples 2-4, and all remaining versions of the screens. The numbering does not affect the collection, storage, or retrieval of the data.

Example 1 : Version of the I&R Assessment Screen for a Beneficiary Assigned to T1-WIC Treatment Group

The screenshot displays the ETOSoftware interface for the WIPA Initial Contact and Demographics assessment. The user is logged in as 'fake' and is viewing the assessment for 'Fake, Test1' on February 14, 2011. The assessment is titled 'I&R Assessment'.

Section A. BOND Status

A-2. T1-WIC
 This beneficiary is in BOND and eligible for the benefit offset. If your agency is not a BOND provider, please assist the beneficiary to contact the BOND Call Center toll-free at 1-877-7BOND09 (1-877-726-6309) to find out where the beneficiary may receive BOND services.

A-5. BOND Treatment Group T1-WIC

Section B. Inquiry Information

B-1. Topic of Inquiry

Benefits
 Work Incentives
 WIPA Services

Example 2: Version of the I&R Screen for a Beneficiary Who is Not a BOND Participant.

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Enter Search Term(s) within **Participant** in **WIPA Initial Contact and Demographics** Search

Take Assessment for Fake, BOND58 on Feb 14 2011

I&R Assessment

Section A. BOND Status

This beneficiary is not a BOND participant.

Section B. Inquiry Information

B-1. Topic of Inquiry

- Benefits
- Work Incentives
- WIPA Services
- Non-WIPA Services
- Employment
- Education

Example 3: Version of the WIPA Baseline Assessment Screen for Beneficiary in T1-WIC

WIPA Work Incentives Plan (Baseline)

Beneficiary Goals | Beneficiary Employment | OPTIONAL-Benefits Analysis

Section Header Quick-Links

- [Section A. BOND Status](#)
- [Section B. EMPLOYMENT PLAN](#)
- [Section C. EDUCATION PLAN](#)
- [Section D. BENEFITS/WORK INCENTIVES/SERVICES PLAN](#)

Section A. BOND Status

A-2. T1-WIC

This beneficiary is in BOND and eligible for the benefit offset. If your agency is not a BOND provider, please assist the beneficiary to contact the BOND Call Center toll-free at 1-877-7BOND09 (1-877-726-6309) to find out where the beneficiary may receive BOND services.

A-5. BOND Treatment Group T1-WIC

Section B. EMPLOYMENT PLAN

B-1. Did the beneficiary identify employment goals?

No

Example 4: Version of the WIPA Baseline Assessment Screen for a Beneficiary Who is Not a BOND Participant

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Welcome wipa eto - University of Alaska: **WIPA Work Incentives Planning and Assistance** (Change Program)

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fake within Participant in WIPA Work Incentives Planning and Assistance Search

Take Assessment for Fake, NOTinBOND on Feb 14 2011

WIPA Work Incentives Plan (Baseline)

Beneficiary Goals Beneficiary Employment OPTIONAL-Benefits Analysis

Section Header Quick-Links

- Section A. BOND Status
- Section B. EMPLOYMENT PLAN
- Section C. EDUCATION PLAN
- Section D. BENEFITS/WORK INCENTIVES/SERVICES PLAN

Section A. BOND Status

Proceed with standard WIPA services

Section B. EMPLOYMENT PLAN

B-1. Did the beneficiary identify employment goals?

--Select--

2) Consistency of Treatment Group Labels

At the request of BOND, we have relabeled the Treatment Group Variables in WIPA/ETO T1-WIC, T21-WIC and T22-EWIC to be consistent throughout the screens and alerts. For example, previously, the treatment groups were identified as either T1 or T1-WIC. The changes are applied throughout the software. The main change is to the Participant Search Section below, where the treatment groups were previously labeled T22, T1, and T21.

Taylor	Fake	987654321	BOND	T21-WIC	This beneficiary is a participant of BOND Treatment Group T21-WIC and should be advised on how the \$1 for \$2 BOND offset would affect SSDI benefits or referred to the BOND Work Incentives Counseling provider for your site. If this WIPA site is not participating in BOND, please contact the local BOND Site Office for instructions or call 1-877-7BOND90 (1-877-726-6390).
BONDPart	Fake	4/3/1976	BOND	T22-EWIC	This beneficiary is a participant of BOND Treatment Group T22-EWIC. DO NOT UPDATE THIS RECORD. This beneficiary should not receive regular WIPA services and must be referred to the EWIC provider for your BOND site. If this WIPA site is not participating in BOND, please contact the local BOND Site Office for instructions or call 1-877-7BOND90 (1-877-726-6390).
BPMD47	Fake	9/8/1959	BOND	T1-WIC	This beneficiary is a participant of BOND Treatment Group T1-WIC and should be advised on how the \$1 for \$2 BOND offset would affect SSDI benefits or referred to a BOND Work Incentives Counseling provider. If this WIPA site is not participating in BOND, please contact the local BOND Site Office for instructions or call 1-877-7BOND90 (1-877-726-6390).