STATEWIDE SCHEDULER

Qtrac Survey Results

AT ESD WE VALUE

Diversity, equity and inclusion

Integrity

Service with kindness

Innovation

Collaboration

Investing in our people

Agenda

- History / Background

- WDA's survey results

- Challenges / Obstacles

- Post launch activities (What have we done?)

- More to come (What are we working on?)

- Next steps

History / Background

- March 2020 – WorkSource began providing 100% Virtual Services

- November 2020 – WorkSource leaders determined that a scheduling tool was needed to allowed customers and employees to schedule services, both in person and virtually
  - This was important to ensure we could meet capacity limits when office would reopen, in order to comply with Covid safety precautions
  - The project team was created to gather and gain approval for business requirements

- January through April 2021 – 2 rounds of the RFQ process were conducted to select a vendor
  - The 1st round was unsuccessful at finding a vendor so the RFQ was modified, revised process and then resubmitted

- End of April / Early May – Lavi industries, Qtrac solution was selected, the procurement team negotiated a contract, and the CISO Security Review was completed

- June 2021 – The project team worked closely with Lavi to prepare for launch
  - Training was delivered to Users and Super Users
  - UAT testing was completed

- June 30th, 2021 – Launch of the Qtrac tool – available to all WorkSource offices

Organizational change is successful when:

Awareness	Desire	Knowledge	Ability	Reinforcement	=	**Change**
	Desire	Knowledge	Ability	Reinforcement	=	**Confusion**
Awareness		Knowledge	Ability	Reinforcement	=	**Resistance**
Awareness	Desire		Ability	Reinforcement	=	**Fear/Anxiety**
Awareness	Desire	Knowledge		Reinforcement	=	**Frustration**
Awareness	Desire	Knowledge	Ability		=	**Backsliding**

Qtrac Survey

- Survey Monkey survey was sent out 7/29/21 with a deadline of 8/6/21

- Sent out to about 400 people
  - Leaders, users & super users

- Reminder sent out on 8/4/21

- Pulled results on 8/9/21

- 71 responses

- 12 questions

WDA 1 - Olympic - Not using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- I am a partner and don't have occasion to do so.
- I have extremely limited staff with only opportunities for appointments 2 days a week and staff are making their own appts based on their availability. We are using a shared calendar to track appts.
- Kitsap opted out for now.
- No linkage with case manager calendars, means that there's no way to ensure that double booking doesn't happen. Also, case managers need to have only select clients able to set appointments with them
- First time hearing about QTrac
- We have our own way of scheduling that works much better for us.
- I don't schedule front-end appointments in our office. I only schedule appointments for customers on our case load
- It requires too much input to utilize compared to current process for scheduling appointments
- Basically Qtrac and Cisco Finesse phones are great for a large office or call center, but very hard to manage with a small office.
- I believe simpler is better. This QTrac system is way too complicated when something simpler works so much better.
- I think the Qtrac system is great in concept, and I'd like to see it used on a larger scale.

Obstacles

- Unknown
- Limited Staff is the major issue.
- More individual learning hands-on
- None that I know of.
- It's too cumbersome. Too many clicks, when I can just put someone on my calendar with one click. Or we can slip them in our easy to find customer sign up sheet.
- There are no obstacles, it's just not a tool that I use.
- Finding a way to make it usable without requiring more work compared to what we are already doing.

Responses/ Strategies

- **Limited staffing:** We are working on alternative configurations to support very small offices.
- **Hands-on Learning:** The test environment is now available.
- **Cumbersome/too many steps**: We agree that the partial implementation is too cumbersome and results in duplicating work. Our recommendation is for offices to use our new check list and configurations worksheet to ensure that customers can schedule their own appointments (rather than staff doing this for them) and implementing the walk-in feature, which saves steps for staff.
- **No connection to Outlook/individual calendars:** This is not recommended by our vendor because the system would not know which appointments to direct to Qtrac and which appointments are not customer-facing.
- **Case managers need to restrict appointments:** Case managers may prefer to set appointments for their customers.

Most and Least Common Concerns

Most Common Responses

- **Hands-on Learning Needed:** The test environment became available on 8/12/21.
- **Cumbersome/too many steps/doesn't work for walk-ins:** We agree that the partial implementation is too cumbersome and results in duplicating work. Our recommendation is for offices to use our new check list and configurations worksheet to ensure that customers can schedule their own appointments (rather than staff doing this for them) and implementing the walk-in feature, which saves steps for staff.
- **Super user ability to control local changes:** There are detailed steps on how offices can submit requests to change their office settings, which usually results in 1-2 business days turnaround time when received by Qtrac admins. Lavi is currently investigating modifications to permissions, to allow super users the ability to update their office appointment settings and will require contract costs.

Less Common Responses

- **Limited staffing/limited foot traffic:** We are working with the Columbia Gorge offices on alternative configurations to support very small offices.
- **Dealing with emergent situations:** We recommend building flexibility into your configurations so that you will be able to handle emergency situations as walk-ins. Staff are able to shift appointments from one staff member to another as needed.
- **SAW Accounts:** Multiple non-ESD partner staff are set up with SAW access and they have been able to access Qtrac. This may be a one-off issue and they would need to report the issue as a ticket. The directions on how to submit are on WPC.
- **Referral answers not relevant:** We can easily change the response options and would love to hear your feedback on what we could add to make this relevant.
- **Case managers need to restrict appointments:** Case managers may prefer to set appointments for their customers.
- **No connection to Outlook/individual calendars:** This is not recommended by our vendor because the system would not know which appointments to direct to Qtrac and which appointments are not customer-facing.

A Note About Training

- There are currently multiple training videos, guides, and desk aids available for all staff to review as needed. To date, the team has provided many opportunities for staff to attend training. Sessions were recorded and shared on WPC. Offices can also request any local training sessions if needed. It is up to the office, and to leadership, to mandate staff review the training. There were 11 staff and super user training sessions sent to all Qtrac staff, 12 one-on-one sessions with offices, and 8 super user open office session. We recommend that offices and staff review, and review again if necessary, the training material and videos to become familiar with the system.

Project Challenges

- Fast turnaround (4 weeks) affected aspects of the project:
    - No enough time to set up a test environment
    - Unable to 'turn on' customer-initiated appointments at launch

- Low adoption:
    - Extra steps / duplication of work
    - Many conflicting priorities – return to office
        - Takes time/planning to configure and set up for each office
    - Too much change going on at the same time
    - Lack of desire to use
        - Some don't see the benefit or the WIIFM

Post launch activities...

(What have we done?)

- Onboarded 15 offices

- Trained & retrained users & Super Users
  - Hosted 20 training sessions
  - Created a Test Environment to allow user and super users a space to test and experiment with features such as walk in appointments
  - Hosted 11 - 1 on 1 sessions with offices to customize set up and problem solve

- Weekly/daily calls with Lavi

- Hosted weekly Super User calls
  - Created Super User Teams channel (Employment Connections)

- Created short training videos
  - Book, Edit & Assign Appointments
  - Check In, Call, & Serve Appointments

- Created Job aids:
  - Qtrac Desk Aid
  - WS Office Onboarding Checklist
  - WS Office Qtrac Configuration worksheet
  - Regularly updating FAQ documents for user & Super Users

- Walk in Demo with the pilot team
  - Sunnyside, Central Basin, Spokane, Pierce, Lynnwood and Auburn testing Walk In – Feature

- Partnered with Communications and Customer Experience teams to update SMS Verbiage in tool

- Qtrac User Feedback Survey
  - Ongoing feedback collected

- Celebrated WorkSource Auburn's success with using Qtrac and shared their practices in Employment Connections newsletter (also available at the Workforce Professionals Center)
  - Lavi visited WS Auburn to observe use and feedback, provided in depth staff training and recommendations

More to come....

(What are we working on?)

- Glossary of terms

- Creating more Job Aids
  - Step by step guides

- Office or Area consultations (1 on 1 Support)

- Additional trainings / make them a requirement

- Communication with Lavi and users

- Examples with scenarios
  - Getting logged in and ready
  - Creating an appointment
  - Rescheduling an existing appointment
  - Checking a customer in
  - Texting a customer in the queue
  - Calling a customer from the queue
  - Completing an appointment
  - Super user configurations
  - General user guide: From scheduling to ending an appointment

Date	Total Appointments Scheduled	In Person	Phone / Virtual	Employment Services	Business Service	Resource Room	Tech Access	Program Counselor	Quick Appointments	Vet Orientation	Work First	UI Info	No Shows	Show Rate
1-Aug														
2-Aug	13	10	3	2		3			3	1	1	1	2	84.6%
3-Aug	10	10	1	3		3			3	1			1	90.0%
4-Aug	14	14	0	5		5		2		1		1	0	100.0%
5-Aug	14	12	2			4		4	2		3	1	0	100.0%
6-Aug	10	7	3			3		1	1			2	3	70.0%
7-Aug														
8-Aug														
9-Aug	12	9	3			4			3	1	1	1	2	83.3%
10-Aug	16	15	1	4		5		1	1	1	1		3	81.3%
11-Aug	17	13	4	3		5		3	3			1	2	88.2%

SAMPLE REPORT

⚒ Continue to create tools that aid offices in set-up and usability

🏢 1 on 1 support/training is available to any offices that **want/need** it

🤝 Lavi is looking at ways to simplify the process and is committed to helping us be successful in Qtrac

📍 Walk-in feature is being piloted in 6 offices and will be rolled out to all offices

📊 **The team is working to create** robust reports that will help **leaders with** data driven decision making

We need you to:

⚙ **Encourage usage and adoption** – we will only get out what we put in (the more we use the tool, the more valuable it will be for us)

Support your teams in this adoption and make it a requirement to attend training and provide time to test

Next Steps

Q&A

WDA 2 and WDA 3

Qtrac Survey Feedback by WDA

WDA 2 - Pac Mountain - Not using Qtrac

of responses - 0

- Pac Mountain is working on setting up their offices and they plan to start using Qtrac at the beginning of September.

WDA 3 - Northwest - Not using Qtrac

of responses - 1

- Northwest has their own scheduler that was created by their office and staff. They have been using it since they began working virtual. They gave feedback that most staff don't like change.

WDA 4 - Snohomish - Partially using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- Not as well as expected.
- Our Office uses SharePoint and RAS to actually schedule. We double schedule into Qtrac. We cannot make changes to Qtrac schedule so cannot use it for the Office as our schedule changes weekly.
- It's stressful
- It has been adding too many steps to our already overloaded tracking system. We have not been able to use it to schedule all of our appointments as it is too complicated with a lot of limitations. At this point we have calculated that it take to a staff member around 3 minutes to check in, start services, etc per customer As we have limited capacity it has been "doable", but once we go back to full capacity we are hesitant if this is going to be something we can keep up. The creation of stations has solved some of the issues, but we need to have multiple screens open and it has been a confusing process for the whole staff

Obstacles

- There has been many challenges as Qtrac is being utilized to assist with scheduling customers and tracking how customers are being served and for how long the service is being performed. From our experience, Qtrac would be a product that is better suited for a business that only runs on tracking appointments only. Qtrac has very little room for flexibility to work the way we need a tracking system to function the way a Resource Room functions. The amount of staff time that is being utilized on determining if Qtrac is a good system is taking away from the core of the services we are trying to provide to customers. Qtrac is adding a new layer of barriers for customers who are already technologically challenged. Qtrac is adding another hoop for a customer to jump through for simple tasks or needs to utilize WorkSource services such as printing, copying, or faxing - which takes very little time. Qtrac is also very cumbersome for our technologically challenged customers - which in turns puts the responsibility back to our staff to utilize Qtrac properly. Qtrac has added another layer of work for the staff to use another system on top of other in house data management systems. To have a system like Qtrac would not work in an open walk-in resource room. In order for Qtrac to work, we would need a full person dedicated to just work on Qtrac alone.
- Qtrac is not flexible as our schedule changes frequently due to trainings, vacation, sick time.
- Remembering the extra steps of not just checking them in (because many do not check themselves in) and then starting service has been tough. So sometimes the start service time is not accurate. Also going to the correct calendar and trying to remember which work station I am on has been hard. I answer the phone and get interrupted in the middle of trying to schedule someone and then it is not easy to tell which station I am on so I often start over.
- The limitation on the flexibility of the creation/ modification of timeslots has made it complicated. Also, customers do not seem to understand how to check in. The population that we are serving at this point generally have some technological challenges, so they have not been able to do it on their end.

Responses/ Strategies

- **Cumbersome/too many steps**: We agree that the partial implementation is too cumbersome and results in duplicating work. Our recommendation is for offices to use our new check list and configurations worksheet to ensure that customers can schedule their own appointments (rather than staff doing this for them) and implementing the walk-in feature, which saves steps for staff.
- **Training:** We recommend that offices and staff review, and review again if necessary, the training material and videos to become familiar with the system.
- **Hands-on Learning:** The test environment is now available.
- **Super user ability to control local changes:** There are detailed steps on how offices can submit requests to change their office settings, which usually results in 1-2 business days turnaround time when received by Qtrac admins. Lavi is currently investigating modifications to permissions, to allow super users the ability to update their office appointment settings and will require contract costs.

WDA 5 - King - Partially using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- Getting better everyday. As system updates and proposed adjustments are being made, the system seems to be operating smoother and more efficient for staff.
- Good.
- Smooth operations. There are some challenges like not being able to serve more than 1 customer at a time and difficulty viewing on the 'agenda' view whether the appt is in person or phone call.
- There are a lot of kinks to work out but out team has been giving our input and ideas. The QTrac IT team has been working on fixing the issues promptly.
- It's going well considering we are a pilot location. The support team has been responsive to are concerns and issues.
- It is going well
- Working on flow. Scheduling appointments is easy, checking customers in, has been questionable. Resolving the ability to copy the confirmation number really helped eliminate extra steps
- It's going but QTRAC seems to be very cumbersome...to many steps to set an appointment or provide services or resources.
- GREAT
- It's going okay

Obstacles

- Super users (select staff and supervisors) not having the ability to make on the spot needed changes to individual (folder/ calendars/appointment slots and times).
- See answer in question 5. Plus, when another staff member sets an appointment unfortunately they may not be aware that I have an emergent situation with a client that I have not been able to schedule immediately and it can gravely delay the emergent care / appointment...
- Small glitches and understanding the system. Not the most user friendly but adapting to it

Responses/ Strategies

- **Super user ability to control local changes:** There are detailed steps on how offices can submit requests to change their office settings, which usually results in 1-2 business days turnaround time when received by Qtrac admins. Lavi is currently investigating modifications to permissions, to allow super users the ability to update their office appointment settings and will require contract costs.
- **Cumbersome/too many steps**: We agree that the partial implementation is too cumbersome and results in duplicating work. Our recommendation is for offices to use our new check list and configurations worksheet to ensure that customers can schedule their own appointments (rather than staff doing this for them) and implementing the walk-in feature, which saves steps for staff.
- **Dealing with emergent situations:** We recommend building flexibility into your configurations so that you will be able to handle emergency situations as walk-ins. Staff are able to shift appointments from one staff member to another as needed.

WDA 6 - Pierce - Partially using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- Perfect

Obstacles

- Unable to access through my SAW account that was set up specifically for QTRAC
- Lack of training and understanding of the application.

Responses/ Strategies

- **SAW Accounts:** There have been multiple partner staff set up with SAW access and have been able to access Qtrac. This may be a one-off issue and they would need to report the issue as a ticket. The directions on how to submit are on WPC.
- **Training availability:** There are currently multiple training videos, guides, and desk aids available for all staff to review as needed. To date, the team has provided many opportunities for staff to attend training. Sessions were recorded and shared on WPC. Offices can also request any local training sessions if needed. It is up to the office, and frankly to leadership, to mandate staff review the training. There were 11 staff and super user training sessions sent to all Qtrac staff, 12 one-on-one sessions with offices, and 8 super user open office session.
- **Hands-on Learning:** The test environment is now available.
- **Training:** Please continue to share specific recommendations to help us improve our training materials.

WDA 7 and WDA 8

Qtrac Survey Feedback by WDA

WDA 7 - Southwest - Not using Qtrac

of responses - 0

- N/A

WDA 8 - North Central - Partially using Qtrac

of responses - 5

How is it going?

- Good
- Great
- We are still working on figuring out the details.

Obstacles

- N/A - None noted

WDA 9 - South Central - Partially using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- Haven't had any for business services
- have not been able to use it right now.
- Most of customers in our region are walk-in and it is difficult to add them into the system if they arrive after the hour as it will only let you schedule to the next available hour slot. The majority of the customers do not check in themselves, the staff usually have to check them in.
- there has been confusion when the customer tries to check in when they arrive at Worksource.

Obstacles

- We don't have the foot traffic to really need to. Most people are walk ins. Their services are really quick.
- I do not use Qtrac because I cover 3 offices in three different towns which include Goldendale, White Salmon, and Stevenson. If I book a client from Stevenson or Goldendale they will get a notification that there appointment is at White Salmon office when that is not true and it will create confusion.
- the first time I did the hours I needed to schedule were not a choice. The second time I tried it sent my client a text to wait and I would be with her. She thought it meant wait in her car and overheated.
- The office is run by Partners and they have each chosen to schedule their own appointments.

Responses/ Strategies

Limited foot traffic:
- We are working on alternative configurations to support very small offices (thank you, Columbia Gorge!)

Doesn't meet walk in approach:
- We agree that the partial implementation is too cumbersome and results in duplicating work. Our recommendation is for offices to use our new check list and configurations worksheet to ensure that customers can schedule their own appointments (rather than staff doing this for them) and implementing the walk-in feature, which saves steps for staff.

WDA 10 - Eastern - Partially using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- okay - though I would like more flexibility in terms of being able to edit. I forgot to start an appointment after I checked the customer in (he had no technology and I scheduled him as well). I would like to be able to adjust this as all of our appointments will be scheduled, checked-in, started and completed by the two WS staff in the office.
- Good, still working to get dual appointment schedulers to use qtrac or allow me to enter appointments. That is the main hiccup, otherwise good.
- Great! I think Qtrac is user friendly even though there is a few kinks to iron out. On the most part it serves the needs of our customers both external and internal.
- there are too many steps to set up appt. (should be able to click on the time slot from the appt. calendar tab)
- 18 clicks to make an appointment. So....

Obstacles

- too many steps
- See above. And how they heard about WS (referral) answers are difficult to match with truth-- most of our customers are scheduling due to contact with a WS specialist (OUR agency).

Responses/ Strategies

- **Cumbersome/too many steps**: We agree that the partial implementation is too cumbersome and results in duplicating work. Our recommendation is for offices to use our new check list and configurations worksheet to ensure that customers can schedule their own appointments (rather than staff doing this for them) and implementing the walk-in feature, which saves steps for staff.
- **Super user ability to control local changes:** There are detailed steps on how offices can submit requests to change their office settings, which usually results in 1-2 business days turnaround time when received by Qtrac admins. Lavi is currently investigating modifications to permissions, to allow super users the ability to update their office appointment settings and will require contract costs.
- **Referral answers not relevant:** We can easily change the response options and would love to hear your feedback on what we could add to make this relevant

WDA 11 – Benton Franklin - Partially using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- we are using a basic schedule and working well

Obstacles

- I am hoping that we will be given the ability to create, modify and delete schedules. Example: we submitted a schedule that works and now we have required training (2hrs) and now need to close some of those appointment spots.

Responses/ Strategies

- **Super user ability to control local changes:** There are detailed steps on how offices can submit requests to change their office settings, which usually results in 1-2 business days turnaround time when received by Qtrac admins. Lavi is currently investigating modifications to permissions, to allow super users the ability to update their office appointment settings and will require contract costs.

WDA 12 - Spokane - Partially using Qtrac

Qtrac Survey Feedback by WDA

How is it going?

- Currently Qtrac isn't being used until glitches are figured out.

Obstacles

- Program isn't working properly
- At launch, I determined additional time was needed to modify our business model to comply with the limitations of the Qtrac system. As an example, due to the fact that Qtrac cannot support varying appointment start times and overlapping appointments of the same type without referencing a different service grouping on our website, I felt as if this would be confusing for our customers.
- It is not intuitive whatsoever. Simply setting scheduling someone and checking them in should be a simple enough task that someone with nearly no experience could walk up to the website and do it. Backend workings will, of course, be more complicated. But to start up and use the system is too much with too many fields to potentially fill, and numbers that have to be just right to make the appointment actually happen.
- Waiting for rollout

Responses/ Strategies

- **Cumbersome/too many steps**: We agree that the partial implementation is too cumbersome and results in duplicating work. Our recommendation is for offices to use our new check list and configurations worksheet to ensure that customers can schedule their own appointments (rather than staff doing this for them) and implementing the walk-in feature, which saves steps for staff.
- **Training:** We recommend that offices and staff review, and review again if necessary, the training material and videos to become familiar with the system.
- **Hands-on Learning:** The test environment is now available.
- **Super user ability to control local changes:** There are detailed steps on how offices can submit requests to change their office settings, which usually results in 1-2 business days turnaround time when received by Qtrac admins. Lavi is currently investigating modifications to permissions, to allow super users the ability to update their office appointment settings and will require contract costs.

Other – No WDA Specified

Qtrac Survey Feedback by WDA

How is it going?

- Not well. It's an additional task we have to remember to start/end, record etc.
- Good.... best system ever!

Obstacles

- No local control. We have to submit schedule and changes to the main controllers. We also cannot format things differently because it changes the entire system, like have a 10:30 appointment or make one on the fly. It is not user friendly.

Responses/ Strategies

- **Super user ability to control local changes:** There are detailed steps on how offices can submit requests to change their office settings, which usually results in 1-2 business days turnaround time when received by Qtrac admins. Lavi is currently investigating modifications to permissions, to allow super users the ability to update their office appointment settings and will require contract costs.

Appendix

What can we do now to drive adoption or usage?

What should we do?	Action Items	Owner
1 on 1 touch		
How can we help you – interact with offices		
Newsletter Highlights of center using it	Employment Connection	Jordyn / Anne
Desk aids		
Focus on getting super users – Early adopters	Create Super User Chat Draft messages for super user to send out Create a glossary of words – cross walk Step by step user guide for Super Users	
Ask what obstacles are preventing them from using it	Qtrac Survey	Jordyn / Liane
Highlight results/dashboard of who is using it or – how many appointments offices are doing		
Communicate WIIFM – why should they use the tool? Why is it important for them?		
Qtrac SME / Expertise		
Different approach to training sessions – more module in nature and hands on approach		

ADKAR Example Activities/Tactics
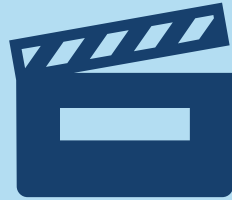
Awareness:

1. Repetitive face-to-face communication of the business reasons for the change and the risks of not changing
2. Use a variety of communication channels, such as team meetings, town halls, emails, articles, etc.
3. Provide employees with ready access to business information, such as external drivers of change
4. Share customer feedback and develop effective responses
5. Surface and address rumors

Desire:

1. Help employees identify the personal benefits of the change (WIIFM)
2. Acknowledge the losses and opportunities associated with the change
3. Address negative history with change – discuss why previous mistakes occurred and how current and future changes can be implemented differently to ensure success
4. Engage employees in the change process at the earliest possible stages of the change
5. Align incentive and performance management systems to support the change

Knowledge:

1. Ensure employees have access to and time to attend training
2. Use job aids to assist employees in the learning process
3. Provide open and ready access to information to support learning
4. Identify employees that others can go to for assistance
5. Provide one-on-one coaching
6. Share problems and lessons learned as a team

Ability:

1. Help employees apply what they have learned to real work situations
2. Ensure that employees have the time and opportunities to develop new skills
3. Provide solutions when the "real work" does not match what they learned in training
4. Be a role model for how to act in the new environment
5. Identify when "more time" is not the answer and external intervention is required

Reinforcement:

1. Celebrate successes
2. Recognize employees for successfully implementing change
3. Gather feedback from employees
4. Identify root causes for low adoption and implement helpful action
5. Build accountability mechanisms into day-to-day business operations

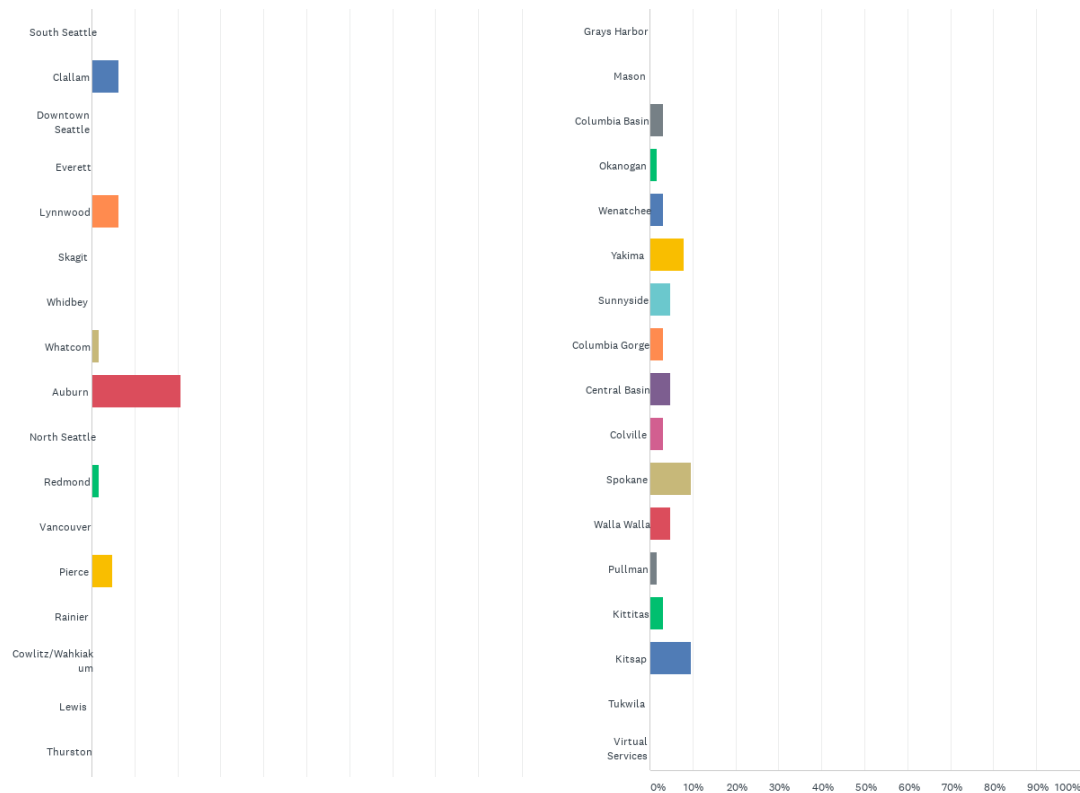# Qtrac User Feedback Survey

Monday, August 09, 2021

71

Total Responses

Date Created: Tuesday, July 27, 2021

Complete Responses: 71

Q1: What office do you work in?
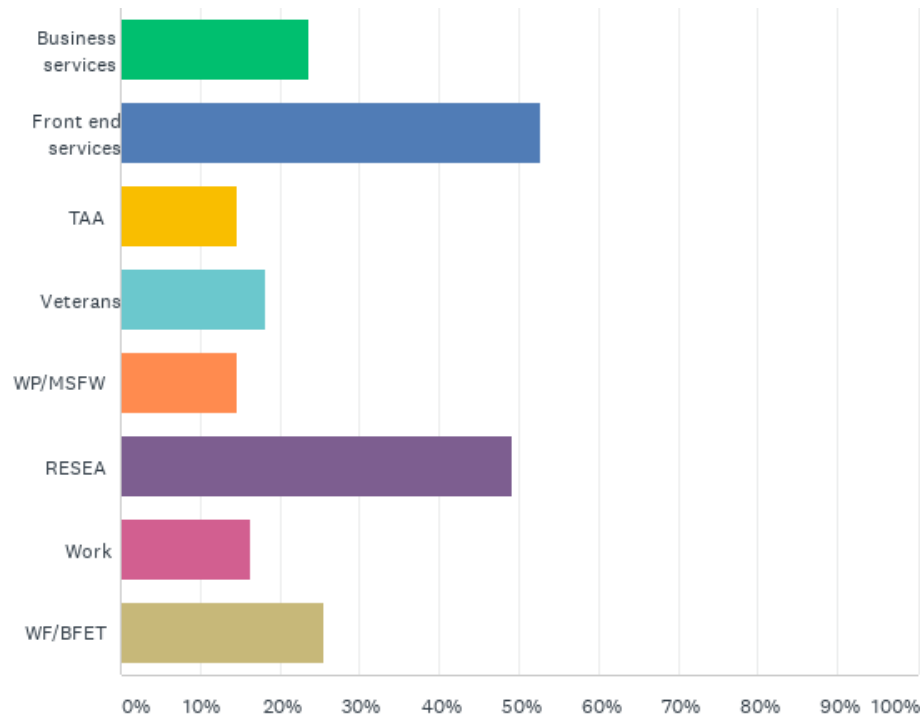
Answered: 63   Skipped: 8

Q1: What office do you work in?

Answered: 63   Skipped: 8

ANSWER CHOICES	RESPONSES	
South Seattle	0.00%	0
Clallam	6.35%	4
Downtown Seattle	0.00%	0
Everett	0.00%	0
Lynnwood	6.35%	4
Skagit	0.00%	0
Whidbey	0.00%	0
Whatcom	1.59%	1
Auburn	20.63%	13
North Seattle	0.00%	0
Redmond	1.59%	1
Vancouver	0.00%	0
Pierce	4.76%	3
Rainier	0.00%	0
Cowlitz/Wahkiakum	0.00%	0
Lewis	0.00%	0
Thurston	0.00%	0
Grays Harbor	0.00%	0
Mason	0.00%	0
Columbia Basin	3.17%	2
Okanogan	1.59%	1
Wenatchee	3.17%	2
Yakima	7.94%	5
Sunnyside	4.76%	3
Columbia Gorge	3.17%	2
Central Basin	4.76%	3
Colville	3.17%	2
Spokane	9.52%	6
Walla Walla	4.76%	3
Pullman	1.59%	1
Kittitas	3.17%	2
Kitsap	9.52%	6
Tukwila	0.00%	0
Virtual Services	0.00%	0
Total Respondents: 63		

Q2: What programs do you work with?

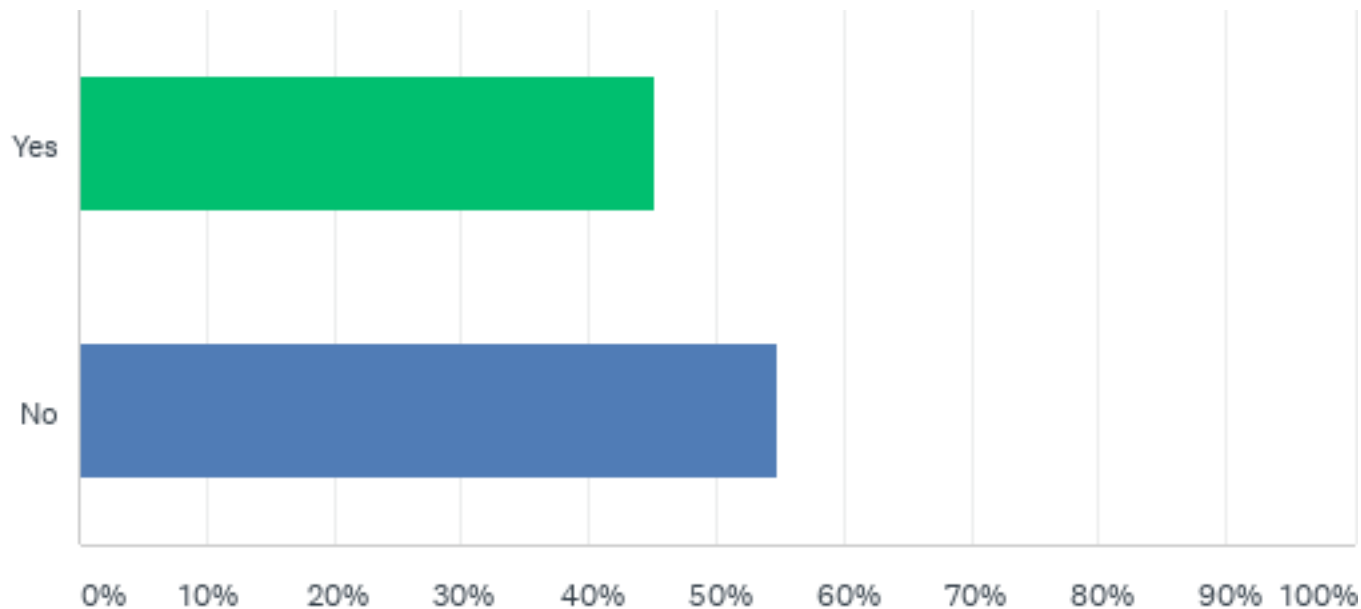Answered: 55   Skipped: 16

Q2: What programs do you work with?

Answered: 55   Skipped: 16

ANSWER CHOICES	RESPONSES	
Business services	23.64%	13
Front end services	52.73%	29
TAA	14.55%	8
Veterans	18.18%	10
WP/MSFW	14.55%	8
RESEA	49.09%	27
Work	16.36%	9
WF/BFET	25.45%	14
Total Respondents: 55		

Q3: Are you a super user?

Answered: 62   Skipped: 9

Q3: Are you a super user?

Answered: 62   Skipped: 9

ANSWER CHOICES	RESPONSES	
Yes	45.16%	28
No	54.84%	34
TOTAL		62

Q4: Are you using Qtrac to schedule appointments?

Answered: 70   Skipped: 1
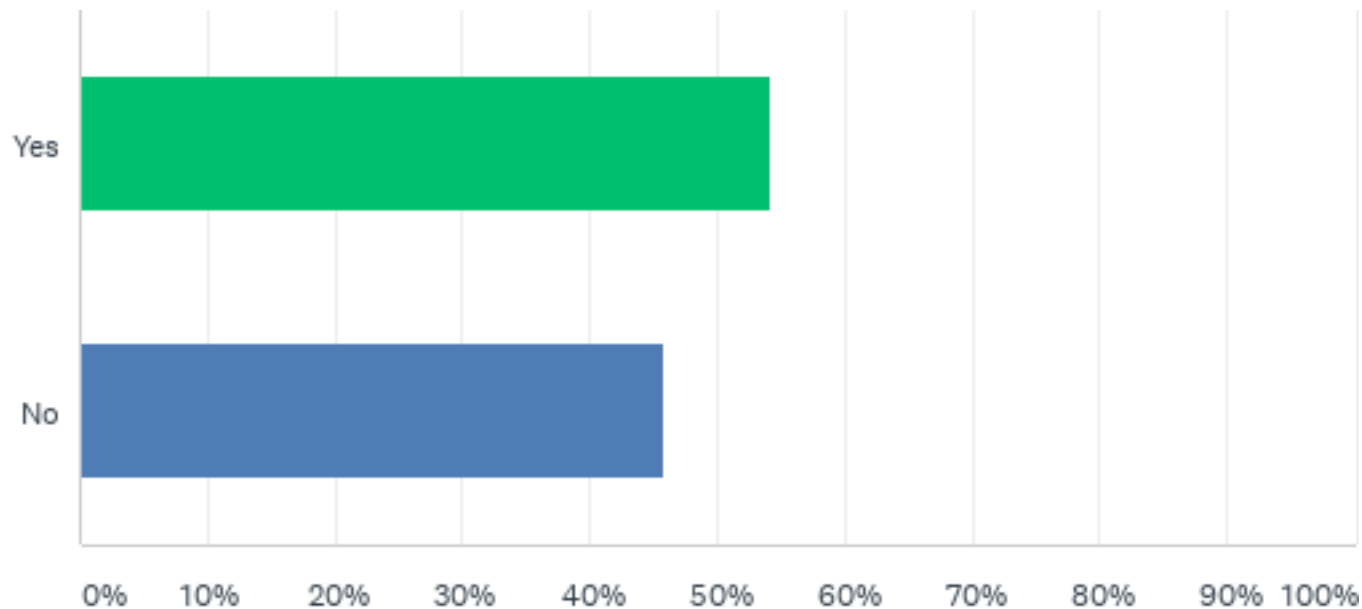
Q4: Are you using Qtrac to schedule appointments?

Answered: 70   Skipped: 1

ANSWER CHOICES	RESPONSES	
Yes	54.29%	38
No	45.71%	32
TOTAL		70

How is it going?

Open ended Response

we are using a basic schedule and working well
Currently Qtrac isn't being used until glitches are figured out.
Not well. It's an additional task we have to remember to start/end, record etc.
Getting better everyday. As system updates and proposed adjustments are being made, the system seems to be operating smoother and more efficient for staff.
Perfect
Good
Not as well as expected.
Our Office uses SharePoint and RAS to actually schedule. We double schedule into Qtrac. We cannot make changes to Qtrac schedule so cannot use it for the Office as our schedule changes weekly.
havent had any for business services
Good.
We have not been able to use it right now.
Most of customers in our region are walk-in and it is difficult to add them into the system if they arrive after the hour as it will only let you schedule to the next available hour slot. The majority of the customers do not check in themselves, the staff usually have to check them in.

| |
|---|
| They are great! |
| Smooth operations. There are some challenges like not being able to serve more than 1 customer at a time and difficulty viewing on the 'agenda' view whether the appt is in person or phone call. |
| There are a lot of kinks to work out but out team has been giving our input and ideas. The QTrac IT team has been working on fixing the issues promptly. |
| It's going well considering we are a pilot location. The support team has been responsive to are concerns and issues. |
| okay - though I would like more flexibility in terms of being able to edit. I forgot to start an appointment after I checked the customer in (he had no technology and I scheduled him as well). I would like to be able to adjust this as all of our appointments will be scheduled, checked-in, started and completed by the two WS staff in the office. |
| It's stressful |
| it is going well |
| Good, still working to get dual appointment schedulers to use qtrac or allow me to enter appointments. That is the main hiccup, otherwise good. |
| Working on flow. Scheduling appointments is easy, checking customers in, has been questionable. Resolving the ability to copy the confirmation number really helped eliminate extra steps |
| It's going but QTRAC seems to be very cumbersome…to many steps to set an appointment or provide services or resources. |
| there has been confusion when the customer tries to check in when they arrive at worksource. |
| GREAT |
| Great! I think Qtrac is user friendly even though there is a few kinks to iron out. On the most part it serves the needs of our customers both external and internal. |
| there are too many steps to set up appt. (should be able to click on the time slot from the appt. calendar tab) |
| Great |
| It has been adding too many steps to our already overloaded tracking system. We have not been able to use it to schedule all of our appointments as it is too complicated with a lot of limitations. At this point we have calculated that it take to a staff member around 3 minutes to check in, start services, etc per customer As we have limited capacity it has been "doable", but once we go back to full capacity we are hesitant if this is going to be something we can keep up. The creation of stations has solved some of the issues, but we need to have multiple screens open and it has been a confusing process for the whole staff |
| It's going okay. |
| 18 clicks to make an appointment. So…. |
| We are still working on figuring out the details. |
| Good…. best system ever! |

Q6: Are there obstacles affecting your ability to schedule appointments?

Answered: 29   Skipped: 42
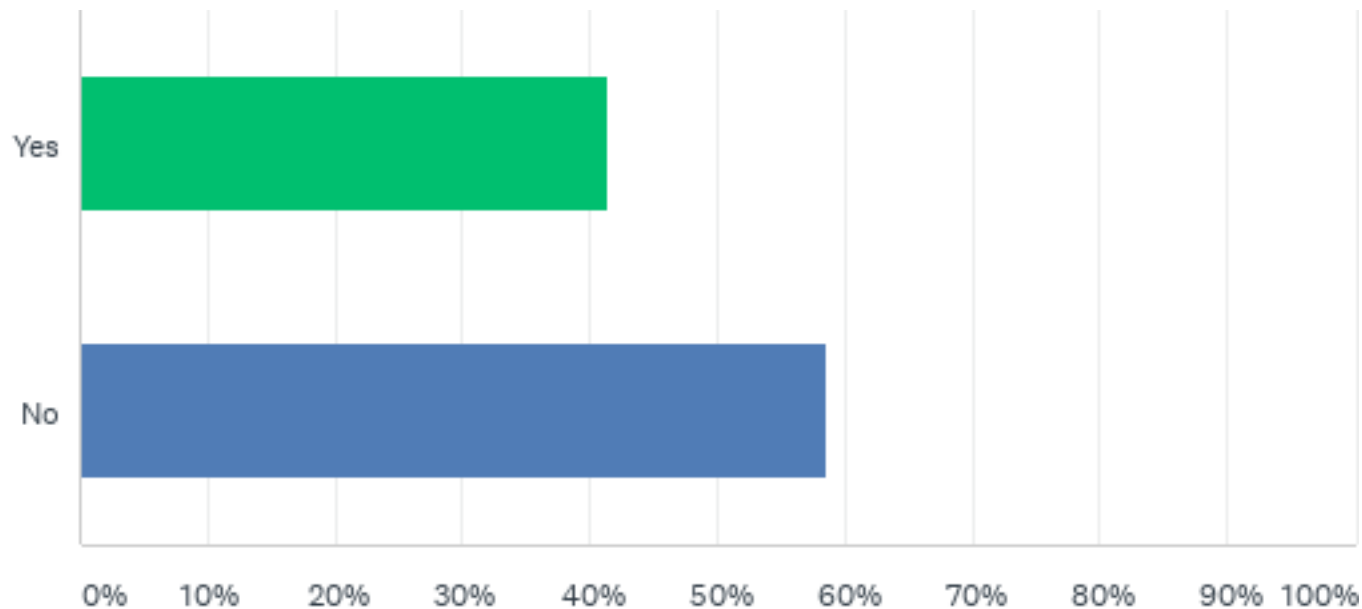
Q6: Are there obstacles affecting your ability to schedule appointments?

Answered: 29   Skipped: 42

ANSWER CHOICES	RESPONSES	
Yes	41.38%	12
No	58.62%	17
TOTAL		29

Why not?

Open Response

We don't have the foot traffic to really need to. Most people are walk ins. Their services are really quick.

I am a partner and don't have occasion to do so.

Unable to access through my SAW account that was set up specifically for QTRAC

Implementation is set for Monday, August 9th

I'm using outlook calendar and email to schedule appointment.

Because we have our own scheduler that created by the office and staff. We have been using it since we've been working virtual. Most staff doesn't like change.

I have extremely limited staff with only opportunities for appointments 2 days a week and staff are making their own appts based on their availability. We are using a shared calendar to track appts.

I'm leaving the agency next Friday.

At launch, I determined additional time was needed to modify our business model to comply with the limitations of the Qtrac system. As an example, due to the fact that Qtrac cannot support varying appointment start times and overlapping appointments of the same type without referencing a different service grouping on our website, I felt as if this would be confusing for our customers.

It is not intuitive whatsoever. Simply setting scheduling someone and checking them in should be a simple enough task that someone with nearly no experience could walk up to the website and do it. Backend workings will, of course, be more complicated. But to start up and use the system is too much with too many fields to potentially fill, and numbers that have to be just right to make the appointment actually happen.

I am a supervisor

I have not use it yet.

Waiting for rollout

Lack of training and understanding of the application.

I do not use Qtrac because I cover 3 offices in three different towns which include Goldendale, White Salmon, and Stevenson. If I book a client from Stevenson or Goldendale they will get a notification that there appointment is at White Salmon office when that is not true and it will create confusion.

Kitsap opted out for now.

No linkage with case manager calendars, means that there's no way to ensure that double booking doesn't happen. Also, case managers need to have only select clients able to set appointments with them

First time hearing about QTrac

the first time I did the hours I needed to schedule were not a choice. The second time I tried it sent my client a text to wait and I would be with her. She thought it meant wait in her car and overheated.

We have our own way of scheduling that works much better for us.

I don't schedule front-end appointments in our office. I only schedule appointments for customers on our case load

It requires too much input to utilize compared to current process for scheduling appointments

The office is run by Partners and they have each chosen to schedule their own appointments.

Are there obstacles affecting your ability to schedule appointments?

Q6 – Open Response

I am hoping that we will be given the ability to create, modify and delete schedules. Example: we submitted a schedule that works and now we have required training (2hrs) and now need to close some of those appointment spots.
Program isn't working properly
No local control. We have to submit schedule and changes to the main controllers. We also cannot format things differently because it changes the entire system, like have a 10:30 appointment or make one on the fly. It is not user friendly.
Super users (select staff and supervisors) not having the ability to make on the spot needed changes to individual (folder/ calendars/appointment slots and times).
There has been many challenges as Qtrac is being utilized to assist with scheduling customers and tracking how customers are being served and for how long the service is being performed. From our experience, Qtrac would be a product that is better suited for a business that only runs on tracking appointments only. Qtrac has very little room for flexibility to work the way we need a tracking system to function the way a Resource Room functions. The amount of staff time that is being utilized on determining if Qtrac is a good system is taking away from the core of the services we are trying to provide to customers. Qtrac is adding a new layer of barriers for customers who are already technologically challenged. Qtrac is adding another hoop for a customer to jump through for simple tasks or needs to utilize WorkSource services such as printing, copying, or faxing - which takes very little time. Qtrac is also very cumbersome for our technologically challenged customers - which in turns puts the responsibility back to our staff to utilize Qtrac properly. Qtrac has added another layer of work for the staff to use another system on top of other in house data management systems. To have a system like Qtrac would not work in an open walk-in resource room. In order for Qtrac to work, we would need a full time person dedicated to just work on Qtrac alone.

Qtrac is not flexible as our schedule changes frequently due to trainings, vacation, sick time.
Remembering the extra steps of not just checking them in (because many do not check themselves in) and then starting service has been tough. So sometimes the start service time is not accurate. Also going to the correct calendar and trying to remember which work station I am on has been hard. I answer the phone and get interrupted in the middle of trying to schedule someone and then it is not easy to tell which station I am on so I often start over.
See answer in question 5. Plus, when another staff member sets an appointment unfortunately they may not be aware that I have an emergent situation with a client that I have not been able to schedule immediately and it can gravely delay the emergent care / appointment...
too many steps
The limitation on the flexibility of the creation/ modification of timeslots has made it complicated. Also, customers do not seem to understand how to check in. The population that we are serving at this point generally have some technological challenges, so they have not been able to do it on their end.
Small glitches and understanding the system. Not the most user friendly but adapting to it
See above. And how they heard about WS (referral) answers are difficult to match with truth-- most of our customers are scheduling due to contact with a WS specialist (OUR agency).

Are there any terms or processes that you don't understand or need additional clarification on?

Open Text

At this time, No
Who assigns staff to the customer.
Not at this time
No
No
Not at this time.
Not yet.
none at this time
Stations being able to serve multiple customers at the same time.
No
Actual hands on training would have been nice.
No
No
no
No
I believe I have a clear understanding now. When checking in customers I experienced 2 separate times, where I followed the process, somehow it did not check them out once services were provided. Called Darius to review, ensuring the process was correct. Since conversation, he shared with programmer and it appears to be resolved.

Most of them. However, if the system isn't intuitive to begin with, having a wall of written text and instructions doesn't help, it just makes it more complicated to process the process (at least for me).
Will hold off on this currently but time will tell.
yes
no
No, not at this time. As a super-user I am more familiar with the process
Super user ability restored so we can make changes as needed.
No.
Just getting familiar with the process - remembering how
No
No
Why isn't the scheduler prominent on the WorkSource Home Page? Most of our customers needing in-person services will struggle to find it buried in the links.
No. The process is fairly intuitive to ue.
n/a
I need a glossary of terms

Q10: What types of resources or support would be most helpful?
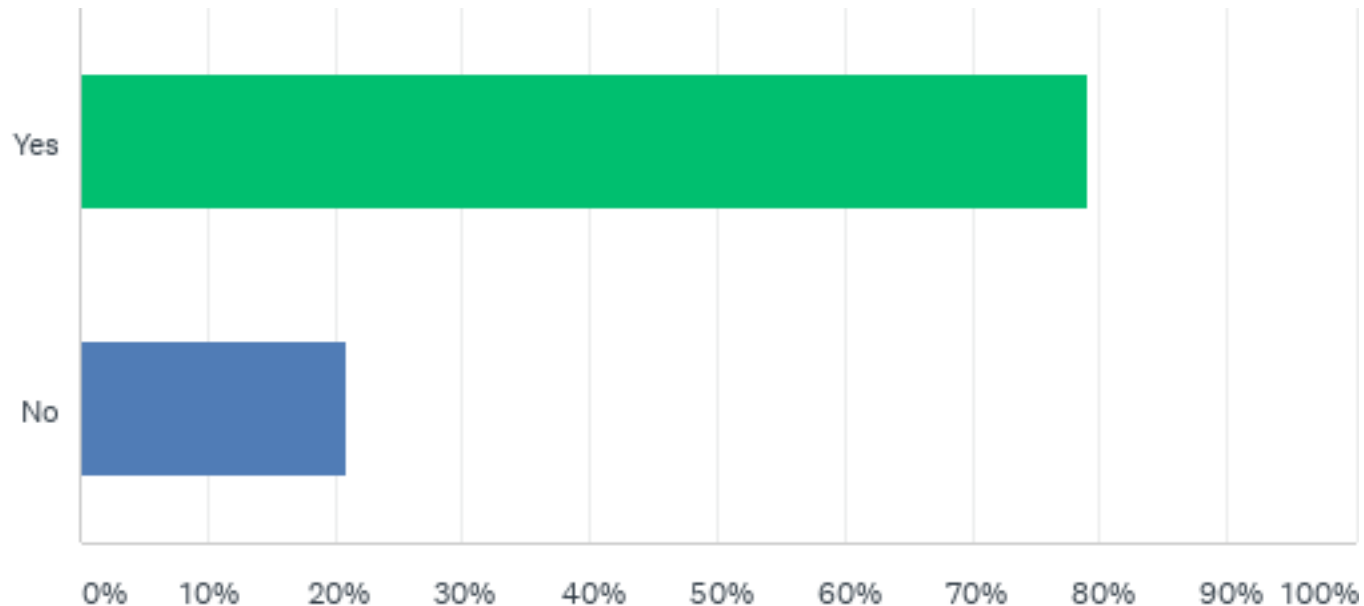
Answered: 43   Skipped: 28
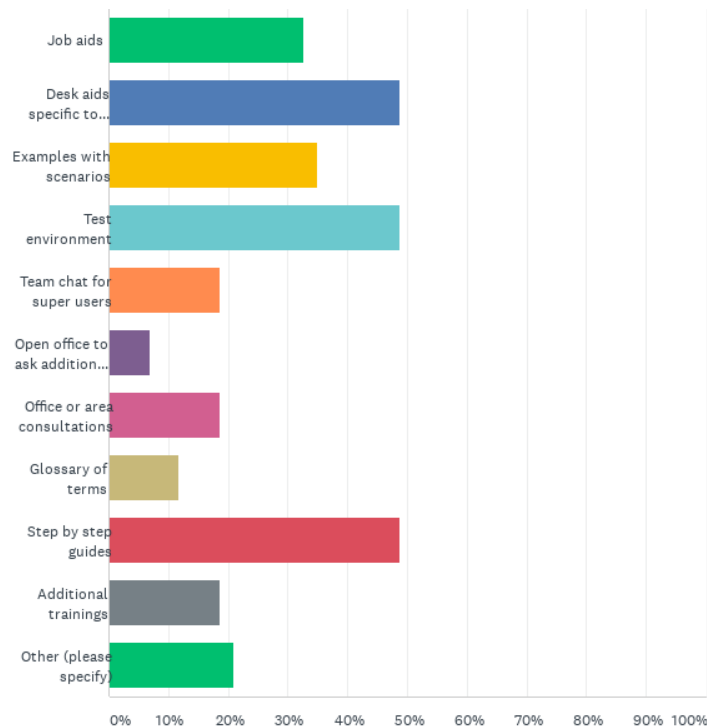
Q10: What types of resources or support would be most helpful?

Answered: 43   Skipped: 28

ANSWER CHOICES	RESPONSES	
Job aids	32.56%	14
Desk aids specific to your office's processes	48.84%	21
Examples with scenarios	34.88%	15
Test environment	48.84%	21
Team chat for super users	18.60%	8
Open office to ask additional questions	6.98%	3
Office or area consultations	18.60%	8
Glossary of terms	11.63%	5
Step by step guides	48.84%	21
Additional trainings	18.60%	8
Other (please specify)	20.93%	9
Total Respondents: 43		

Q11: Would an example or resource document be helpful?
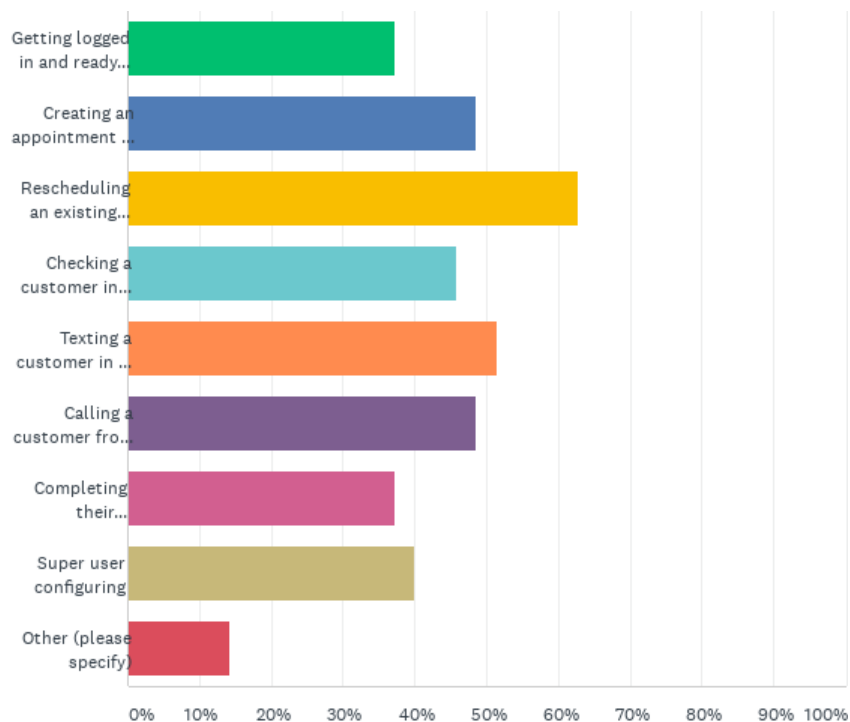
Answered: 48   Skipped: 23

Q11: Would an example or resource document be helpful?

Answered: 48   Skipped: 23

ANSWER CHOICES	RESPONSES	
Yes	79.17%	38
No	20.83%	10
TOTAL		48

Q12: If yes, what examples or scenarios would you like to see?

Answered: 35   Skipped: 36

Q12: If yes, what examples or scenarios would you like to see?

Answered: 35   Skipped: 36

ANSWER CHOICES	RESPONSES	
Getting logged in and ready to serve customers	37.14%	13
Creating an appointment on behalf of a customer	48.57%	17
Rescheduling an existing appointment	62.86%	22
Checking a customer in when they can't do it themselves	45.71%	16
Texting a customer in the queue	51.43%	18
Calling a customer from the queue	48.57%	17
Completing their appointment	37.14%	13
Super user configuring	40.00%	14
Other (please specify)	14.29%	5
Total Respondents: 35		

Do you have any additional comments of feedback you'd like to provide?

Open Response

Not at this time
There needs to be the ability to have more local control and not have to wait for others to change our schedule when we know our office schedule best.
NO
I don't think the text feature should be an option.
Would appreciate one scheduler that encompasses RAS, LEX, and Partners as we utilize 2-3 schedules for one appointment. Not lean.
None.
Not at this time.
none at this time
It would be nice if we are able to make changes to times as superusers instantly instead of having to go through a process to make that change.
Basically Qtrac and Cisco Finesse phones are great for a large office or call center, but very hard to manage with a small office.
I am anticipating being ready to pilot Qtrac within two weeks. I have also signed up to participate in the customer walk-in pilot.
I understand how to use it, there are just some limits that the system poses on our operations as mentioned earlier. We also need a notes section to write some details for the person who will be serving the customer after we schedule the appt.
Have patience with the system and create a spreadsheet noting your concerns/issues and your suggested "fixes". Don't be afraid to try the features and become well rounded with Qtrac. Determine and develop a team within your office to track issues/concerns and suggested fixes. Relax and be open to change. It's just another system and it will become more efficient and effective with your help.
none, thank you

Adding the name of the workstation you are using within EVERY page of Q-Trac in case you get interrupted (we use multiple for computer work stations that customer use in my office), adding a line for extra notes when creating an appointment, and changing the colors of the briefcases to signal different calendars so you can make sure you click on the right one (not just all yellow with a checkmark in them).
It seems with this system there should be 2 "modes"- A 'Super User Scheduler' mode where appointment times for the facility can be altered and added, and a 'Normal Scheduler' mode where appointments are simply filled and checked in. If your response to reading that is, "But that's what 2 modes we currently have" then you need to realize, that is not what the program feels like when using it and it is too convoluted for everyday use.
Find an simpler system or go back to what was being used previously that was very effective.
no
I do believe it's a system that can work for some offices but not all.
I think there should be a link to be able to add Qtrac to project to the TVs. Busy season, people can see who is next and so can staff
I believe simpler is better. This QTrac system is way too complicated when something simpler works so much better.
Many of us do other jobs in the office. We understand the need for data. Overload is still overload. This is written with a smile on my face. Thank you.
I think the Qtrac system is great in concept and I'd like to see it used on a larger scale.