WorkSource Office Onboarding Checklist

Please use this onboarding checklist to get your staff and WS office ready for Qtrac. Use this as a step-by-step reference guide to onboard your WS office into Qtrac and information on Qtrac.

[ ]  **Sponsorship**. Ensure you have your WS area leader(s) sponsorship and approval for your WS office using Qtrac for customer scheduling purposes

[ ]  **Training**. Review the Qtrac training material on WPC at <https://wpc.wa.gov/tech/qtrac-training-resources> for the overview of Qtrac and its use

* There are both [standard WS staff training](https://www.yout-ube.com/watch?v=ESdsjaofDl4) and [WS super user training videos](https://www.yout-ube.com/watch?v=WQD6TVxcWrA%20) and training playbook (how-to guides)
* There are also “bite-sized” training clips as well – [Book, Edit, Assign Appointments](https://storemultisites.blob.core.windows.net/media/WPC/tech/Qtrac/Book%2C%20Edit%2C%20%20Assign%20Appointments.mp4), [Check In, Call, Serve appointments](https://storemultisites.blob.core.windows.net/media/WPC/tech/Qtrac/Check%20In%2C%20Call%2C%20%20Serve%20Appointments.mp4)
* There are also [Qtrac desk aids](https://storemultisites.blob.core.windows.net/media/WPC/tech/Qtrac/Qtrac%20Desk%20Aid.docx) for step-by-step tutorial on how to perform basic Qtrac tasks
* Review the [Qtrac Glossary](https://storemultisites.blob.core.windows.net/media/WPC/tech/Qtrac/qtrac-glossary.pdf) for the common terms and features used in Qtrac

[ ]  **Request for additional/edits to Qtrac users** - If you need to request more Qtrac users for your office, please request users at <https://wpc.wa.gov/tech/security>. Please specify if access request is for Qtrac Test or Production, or both

* Overview of the new [Qtrac Add/Update User process](https://wpc.wa.gov/tech/qtrac-report-issues)

[ ]  **Create Qtrac Stations**. Attention Qtrac Super Users – you will need to identify or create Qtrac Stations for any new users you request to use Queue Management. Offices can create as many and named anything that make sense for their Qtrac Stations – some offices use staff names, and others use room names

* [Qtrac Training Playbook for WS Super Users](https://storemultisites.blob.core.windows.net/media/WPC/tech/Qtrac/Worksource%20Super%20User%20Training.pptx) on steps on how to add a new Qtrac Station
* [Super User – Qtrac FAQ](https://storemultisites.blob.core.windows.net/media/WPC/tech/Qtrac/Super%20User%20Qtrac%20QA.docx) on information about Qtrac Stations

[ ]  **Access the Qtrac TEST** environment to practice and get experience with Qtrac. This environment contains the latest users and office setting from the production Qtrac environment. DO NOT USE FOR ACTUAL, REAL APPOINTMENTS

* [Qtrac Test URL](https://ead.sts.wa.gov/adfs/ls/idpinitiatedsignon.aspx?LoginToRp=https://worksourcewa.lavi.com/TEST/mgmt/saml/metadata)

[ ]  **Setting up Qtrac and considerations**. For WS Office Super Users – Things to consider and tips as you plan your office to use Qtrac

* Note: Qtrac does not replace RESEA or group workshops in Trumba, or other program specific tools
* Practice, Practice, Practice some more within Qtrac. The Qtrac test environment is for you and staff to get hands-on with Qtrac, and review the training videos and material in WPC to guide you
* Identify enabled staff(s) that will take the time and effort to learn how to use Qtrac, and how best to modify Qtrac to fit your office model and processes. It is important to have local office experts of Qtrac that can also help their office teammates and train others
* Have a plan for how you will balance and manage your staff workforce at your office and your office details related to customer appointments. Identify the baseline of staff you will always have available for customer appointments and walk-ins, and a plan for staffing dynamics
* Create a tracking sheet of your teams’ concerns, issues, and solutions to be discussed with you team during your staff-meetings, and to follow up with Lavi team for improvements
* Have “After Action Review” meetings on to discuss with staff and leadership on what went well and not well and next steps to be taken

[ ]  **Qtrac Configuration Worksheet**. Use the [WorkSource Office Request for Qtrac Configuration Worksheet](https://storemultisites.blob.core.windows.net/media/WPC/tech/Qtrac/ws-office-request-qtrac-config.docx) to assist with planning your appointment settings in Qtrac

[ ]  **Schedule 1:1 consultation time, if needed,** with the Lavi team to get a deep dive with Qtrac and brainstorm how best to tailor Qtrac for your office. See [Workforce Professionals Center - Qtrac report issues (wa.gov)](https://wpc.wa.gov/tech/qtrac-report-issues) on how to request the consultation or changes

[ ]  **Access Qtrac Production**. If your staff has Qtrac access and reviewed the steps above, in the below page provides different directions on how to log in to production Qtrac

* [Qtrac Production login](https://wpc.wa.gov/tech/qtrac-log-on)

[ ]  **More Qtrac Support**. If you have further questions that were not answered by the resources above, please review the [“How to request changes to appointment settings in Qtrac”](https://wpc.wa.gov/tech/qtrac-report-issues) to submit request tickets for Qtrac. For example, if your office needs further assistances and consulting, and if you would like to schedule time with the Lavi team, please also create a service request ticket.