

## Create a Record Checklist

Name \_\_\_\_\_ Seeker # \_\_\_\_\_ Date \_\_\_\_\_

### **ETO System**

- Participant is legally entitled to work in the United States. (If “No”, do not add to ETO)
- Step 1: From the left side of your ETO staff dashboard, click the drop-down menu. Select “Participants” from the menu and click the “Add New Participant” option.
- Step 2: Read the Data Sharing message to the participant.
- Step 3: Complete the required\* fields (first name, last name, DOB), and the SSN. Enter an email and cell phone if the participant is able to provide this information. Stop at the cell phone field as information after the field does not apply. \* *Note: Entering the first name, last name, SSN and DOB ensures this staff-created ETO participant account merges with a WSWA account created by the job seeker at a later time.*
- Step 4: When finished entering information, scroll to the bottom of the page, and read the acknowledgment statement before clicking Save.
- Step 5: Dialogue box appears to inform that record was successfully added. Click OK from this box.
- Step 6: To complete the record creation process, the following Details TPs are required:
  - Demographic Details
  - Disability Details (Only if they answered “Yes” on the Demographic Details TouchPoint)
  - MSFW Details (Only if they answered “Yes” on the Demographic Details TouchPoint)
  - Veterans Details (Only if they answered “Yes” on the Demographic Details TouchPoint)
- Step 7: Adding the Details TP process starts from the participant’s dashboard. Click the Review Seeker/Participants Touchpoints widget at the top of the dashboard.

### **ETO: Demographic Details TouchPoint (Must be entered Separately)**

- Click Take New TouchPoint to add the required “Details” TPs. Always begin by selecting the Demographic Details TP from the dropdown menu.
- Complete all information on all tabs of the Demographic Details TP.

### **ETO: Disability Details TouchPoint (Must be entered Separately if they answered “Yes” only on the Demographic Details TouchPoint)**

- Click Take New TouchPoint to add the required “Details” TPs. Next select the Disability Details TP from the dropdown menu.
- Complete all information on the Disability Details TP. If answer is “No”, additional questions won’t appear.

### **ETO: MSFW Details TouchPoint (Must be entered Separately if they answered “Yes” only on the Demographic Details TouchPoint)**

- Click Take New TouchPoint to add the required “Details” TPs. Next select the MSFW Details TP from the dropdown menu.
- Complete all information on the MSFW Details TP. If answer is “No”, additional questions won’t appear.

### **ETO: Veterans Details TouchPoint (Must be entered Separately if they answered “Yes” only on the Demographic Details TouchPoint)**

- Click Take New TouchPoint to add the required “Details” TPs. Next select the Veterans Details TP from the dropdown menu.
- Complete all information on the Veterans Details TP. If answer is “No”, additional questions won’t appear.

### **Completion**

- The participant now has a record created in ETO. Add a case note detailing the reason the participant was added to ETO without a WSWA account.
- You can now begin adding programs and services to the participant’s record.