



Efforts to Outcomes (ETO)

Staff User Guide

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Training Objectives

Instruction for this training will take approximately 20 - 24 hours.

After completing this training, you will be able to:

- Log in and log out of ETO.
- Manage account settings.
- Perform searches for participant and employer records.
- Access program history and other records for participants.
- Access and customize various dashboards.
- View data created in Job Match (participant and employer information including service activities, case notes, assessments, applications, satisfaction surveys, and more).
- Record data in ETO.
- Support participants and employers with staff-supported services via impersonation.
- Identify and access various types of reporting.

Lesson 1: Getting Started

Compatibility

Hardware

Efforts to Outcomes (ETO) Case Management software runs on Windows computers and is not compatible with Apple computers unless configured to operate Windows.

To prevent potential issues, Windows updates should be conducted on a regular basis. It is recommended that the computer is setup to receive automatic updates for Windows.

Software

ETO software is accessed through the internet and is browser neutral. However, it is highly recommended that staff use Edge as we often see issues with pop-up blockers when using Chrome and other browsers.

ETO in Firefox, Google Chrome, Safari, may appear to function properly, but the system may not function or save properly.

Some features are browser neutral and can be accessed in Safari on the iPad as a mobile option.

Access

Log in


Access ETO's secure website at <https://wa.etosoftware.us/> and enter username and temporary password provided by site administrator. Click 'Log in to ETO'



Tip: Bookmark the site or create a shortcut on your desktop to allow fast and easy system access.

First Login:

1. Complete a registration page.
2. Ensure zip code and time zone are accurate.
3. Create a new **permanent** password.
4. Read and then check the box 'I agree to the Social Solutions Terms of Use'.
5. Click 'Save'.



Please confirm your information and reset your password below. The new password is to be used only if your Single Sign On is unavailable and you need to login through the ETO login page.

FIRST NAME

LAST NAME

ZIP CODE

EMAIL ADDRESS

TIME ZONE

NEW PASSWORD

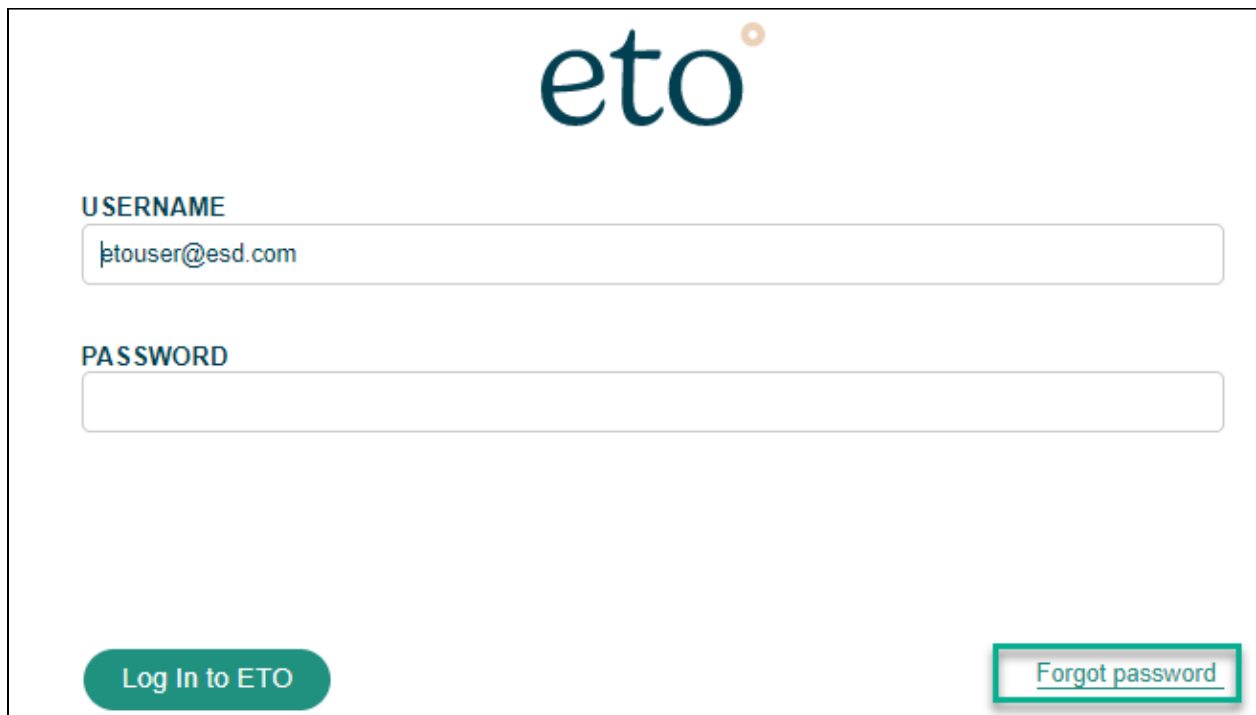
CONFIRM PASSWORD

☒ **I agree to the Social Solutions** [Terms of Use](#) .

All future logins will require the permanent password.

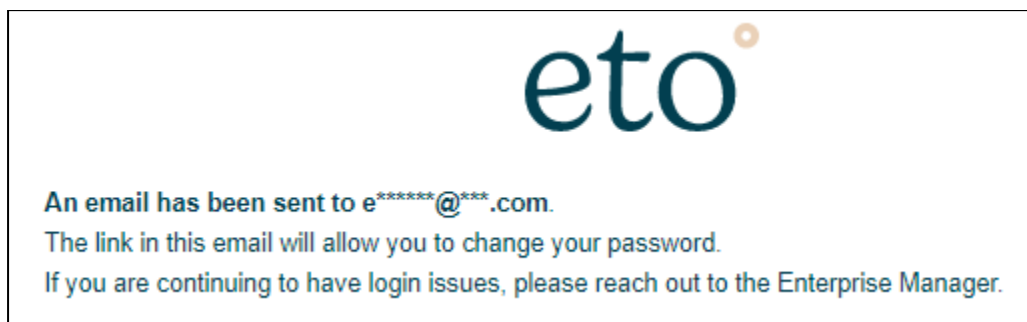
Password Reset

If the permanent password is forgotten, enter your Username and click 'Forgot password.'



The image shows a login form for ETO. At the top center is the ETO logo, which consists of the lowercase letters 'eto' in a dark blue font, with a small orange circle above the 'o'. Below the logo are two input fields. The first is labeled 'USERNAME' in blue text and contains the text 'etouser@esd.com'. The second is labeled 'PASSWORD' in blue text and is empty. At the bottom left is a green rounded button with the text 'Log In to ETO' in white. At the bottom right is a white button with a green border and the text 'Forgot password' in green.

An email will be sent to the staff that includes a link and instructions to reset the password.



The image shows a confirmation message from ETO. At the top center is the ETO logo. Below it is a message in blue text: 'An email has been sent to e*****@***.com. The link in this email will allow you to change your password. If you are continuing to have login issues, please reach out to the Enterprise Manager.'

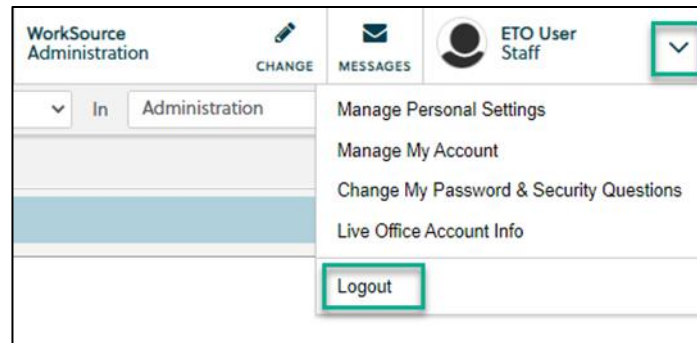
Click the link in the system-generated email.
Enter and confirm a new password and click 'Continue' to complete the process.

All future logins will require the new password.

Log Off

ETO software is a secure website. To keep data secure, users must always log off of ETO when away from the application or device. This practice also secures the integrity of the staff's account.

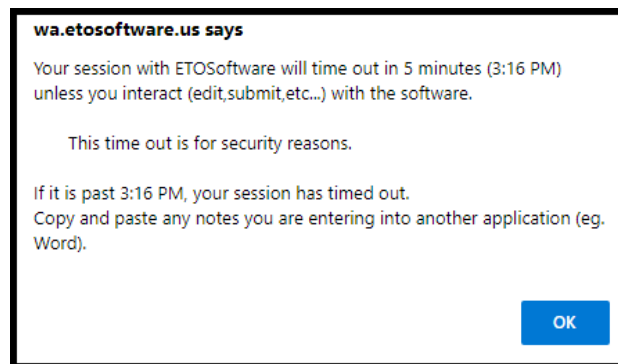
To log off, open the drop-down menu in the top-right corner of the ETO page and click 'Logout'.



Security Timeout

To ensure data security, ETO will timeout after inactive for 30 minutes.

Five minutes prior to timeout a warning message is generated. Click "OK" to continue in ETO.



If the OK button is not clicked prior to the timeout indicated in the message, all unsaved work will be lost even if the system appears to allow staff to complete/save work.

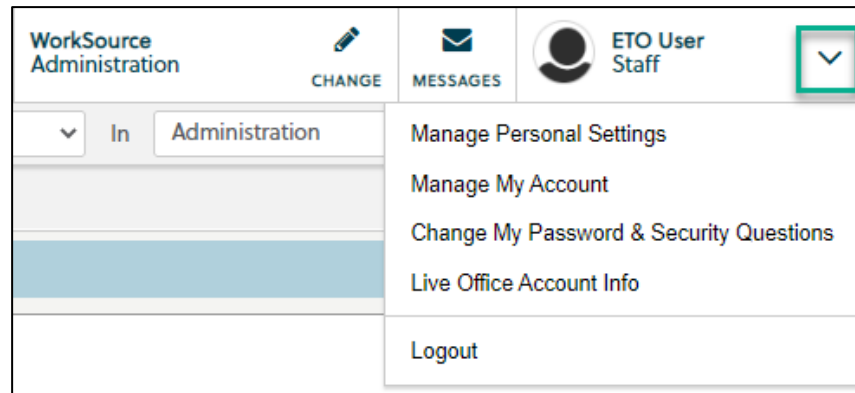
Tip: If timeout does occur, copy any notes/information displayed on the page and paste this information into another application (e.g., Word or Notepad). Log back into the system, and open a new or the existing TouchPoint, and paste the information where appropriate.

Manage User Account Settings

User accounts are self-managed. This feature includes managing personal settings, managing your account, changing password & setting security questions.

You begin by opening the drop-down menu in the top-right corner of the ETO page.

NOTE: We do not use the 'Live Office Account Info' included in the user interface.



Manage Personal Settings

Start by clicking on the link to open the menu so you have the ability to customize these features.

1. Auto Collapse Navigation Bar – sets the Navigation Bar default to be either collapsed or expanded upon login.
2. To Do List Defaults – set to either remember last sort option, or always use a defined sort option.
3. Date of Next Contact Reminder – set to always provide reminder of the date of next contact or never provide a reminder.
4. Retain previous value used to search for participant – set to either remember the last value searched or to not remember last value searched.
5. Quick Search Dropdown - show the quick search dropdown on quick search textbox or hide the quick search dropdown.

Manage My Account

Select 'Manage My Account' to change name, zip code, email address, and time zone.



Manage My Account
Account Settings

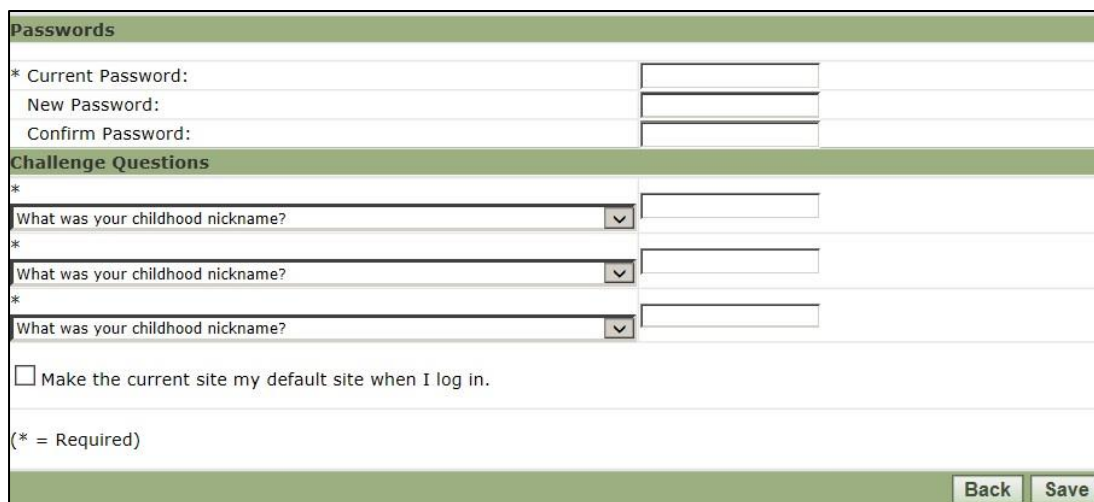
First Name:	WIT
Last Name:	Prod
Zip Code:	98502
Email Address:	witprod@ssg.com
Time Zone:	(UTC-08:00) Pacific Time (US & Canada) ▼

Click 'Save' after changes are made.

Manage Security Settings

Select "Manage Security Settings" to change the current password and set security (challenge) questions to support the self-service password reset option.

- **Passwords:** To change the current password, enter the current password, then enter and confirm a new password. Once the new password is saved, this will be the password used for future logins.
- **Challenge Questions:** Security questions may be set to create two-factor authentication.
- Select one to three challenge questions from a drop-down menu option, then enter an answer in the corresponding text field for each challenge question.
- Click "Save."



Passwords

* Current Password:

New Password:

Confirm Password:

Challenge Questions

*
What was your childhood nickname? ▼

*
What was your childhood nickname? ▼

*
What was your childhood nickname? ▼

☐ Make the current site my default site when I log in.

(* = Required)

Support

WDA local trainers should act as the primary resource for answering users' questions, with the WorkSource Systems Support team as a secondary source.

Submitting Remedy Tickets

All ETO work requests begin by staff submitting a remedy ticket (follow your local process in doing so).

Before you submit a remedy ticket, review the information included in the desk aid, '[Checklist of things to do before submitting a remedy ticket](#)', which includes instructions for clearing your cache. If the issue can't be resolved by following the guidance in the desk aid, submit a remedy ticket [here](#).

Include the following information in the ticket:

1. Include participant or employer name and case ID number (do not include participant SSNs).
2. Screen shots of the entire screen, including browser bar, not just a pinpoint of the TP that isn't correct.
3. Screen shots of error messages and what you were doing when you got the error or 'Robot' message.
4. When submitting a ticket for a Report, include the exact Report name, WDA, office and start and end dates parameters you used to run the problematic report.

Some ETO report issues can be caused by a pop-up blocker, watch this quick pop-up blocker video.

Remember, if you use Chrome and added ETO as a safe site, the next time you clear your cache ETO will be removed. You will get the 'pop-up' blocker and need to add ETO as a safe site.

If requesting support and asked for details on the site, double-click on the 'eto' logo in the top-left corner of the page. This will open the 'Who Am I?' screen. Copy and paste the entire section into a support ticket or an email response.



Lesson 2: Navigating the System

Site and Program

In ETO, the site name is WorkSource and is found at the right side of screen. Directly below the site is the program staff has access to.

Critical Note: In this instance, 'Program' indicates an office location. It does not indicate any program enrollments.



The office location shown in this area is the active office location. All work will be recorded to the active office location. A clickable link means the staff account has access to more than one office location. To change to a different office location, click the office location link and select the desired office location from the drop-down list. Reach out to your local Access Requester to submit the change form if you need additional offices added to your profile.

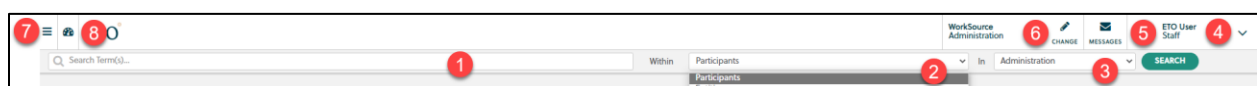
Navigation Methods

There are two common methods for staff to navigate in ETO - 'Quick Search' and the fly-out 'Navigation Bar'. Quick Search is directly below, and Navigation Bar is located [here](#).

Quick Search

The Quick Search bar allows users to search for a:

1. Participant or employer
 - I. Search for a participant by entering their full or partial name, full or partial SSN (without dashes), or the seeker ID.
 - II. Search for employers by company name, recruiter name or their WorkSourceWA ID number.
2. Toggle the menu to select participant or employer (Entity)
3. Select office location (program) or search site wide by toggling menu between local office and WorkSource for site wide search (all offices).
4. Review staff account information
5. ETO message center facilitates messaging between system users
6. Office staff has access to
 - I. Staff with access to multiple offices can click pencil to change offices
7. Open side 'Navigation Bar'
8. Click 'Dashboard' icon to return to staff dashboard

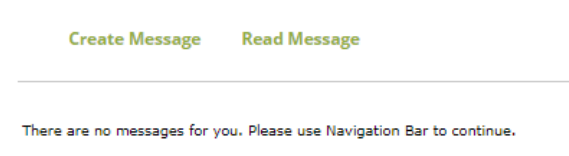


Messages

Messages can be sent to one or more staff within the site, or to all users within the active office location (program). ETO messaging is very similar to the email concept, except the messages are sent and read by users logged in to the ETO system. This messaging system does not allow for file attachments.

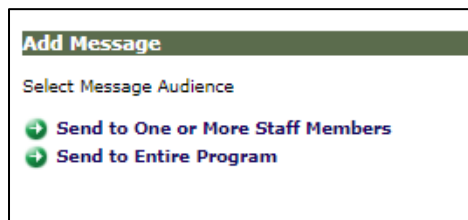
Create ETO Messages

Click the message icon located on the right side of the quick search bar to open the application. From here you will be able to read messages or create a new message.



Click 'Create Message' and select one of the two options available:

1. Send to One or more Staff Members, or
 - a. Select users (CTRL or SHIFT will allow multiple selections). Enter message date, type message and click 'Send Message.'
2. Send to Entire Program
 - a. Sends message to all staff members within the active office location (program). Enter message date, type message, and click 'Send Message.'



Read ETO Messages

The messages icon turns orange when a message is received. Click the icon to view and read your messages. Once read, the orange icon will revert to gray.

Messages remain in the ETO message center until deleted. To delete, check the box to the left of the message, and click 'Delete.' To delete all, check the box in the top right corner labeled Select All, and click "Delete."

Select 'Print all my messages' to print selected messages.

Staff Dashboard

The staff dashboard displays recent activity performed by the staff. The staff dashboard is not geared toward a specific participant or employer, rather it is aimed toward a staff's collective work in the software. Staff dashboard includes recent touchpoints recorded by the staff, links, and shortcuts to record new touchpoints, action links, and a link to the Job Match admin tools.

Dashboard Navigation

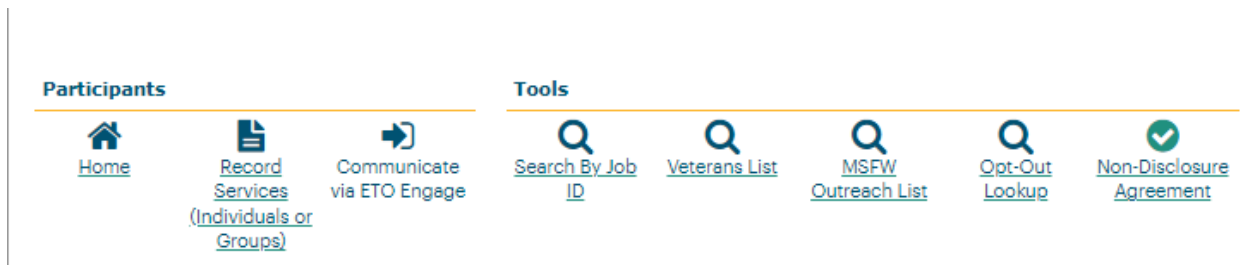
Dashboards are the primary navigation method when working in ETO, providing a quick-glance view of the environment. In addition, all subject types have dashboards including participants, employers, events, touchpoints, and staff.

Using and editing dashboards will be discussed in the dashboard section. The dashboard is the most efficient navigation method because:

- It requires fewer clicks to complete actions than other navigation methods.
- It contains action links - tasks can be completed through links on the dashboard.
- Users can customize dashboards by adding or removing frequently used features (unless disabled by the administrator).
- Dashboards provide an added level of navigation via shortcuts.

Dashboard Shortcuts

Dashboard buttons called 'Widgets' are located at the top of the staff dashboard, the participant dashboard, and the employer dashboard. Click one of the Widget buttons to navigate accordingly. Impersonating a participant or recruiter (discussed in Lesson 8) is achieved through a dashboard Widget.



Tip: Several shortcuts have been created to allow for a quick display of information without the need to run a report.

Participant Dashboard

The participant dashboard displays data and services about a single participant, including General Information, Demographic Details, Disability Details, MSFW Details, Veteran Details, Target Occupation, Guide (UI information), Serving Office, and recent touchpoints (for example, a section labeled Program Management Forms).

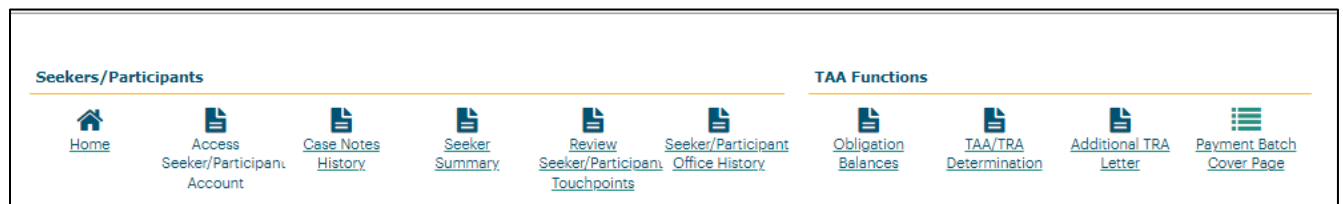
Note: items displayed on the participant dashboard may be customized for different office locations (program).

To access the participant dashboard: Use Quick Search to search for the participant. When located, click the participant's name. If the participant is enrolled in your office a drop-down menu will appear and can decide which page you want to land on, their 'Dashboard', 'View/Edit', 'View/Record TouchPoint', 'Program (office) History' or 'Dismiss from program (office).' If the participant is not enrolled in your office you will automatically land on the 'View/Edit' page.

Note: Records displayed on the dashboard are a synopsis of recent documentation and services. Click dashboard links or access the Review TouchPoints page for more comprehensive records.

The participant dashboard also includes shortcuts to features that can be actioned on for the participant, including impersonating the participant in Job Match, discussed in Lesson 8.

Although the TAA Function dashboard appears for all participant, it is only functional for those enrolled in the Trade Act program and receiving services.



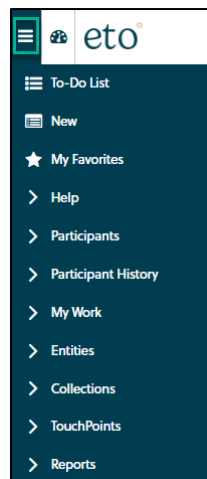
Navigation Bar

There are many ways to perform the same tasks in ETO. While the quick search feature provides links to frequently used features, the Navigation Bar includes **all** features available to a user role.

The Navigation Bar fly out menu can be opened, accessed, or closed by clicking on the triple lines located on the upper left side of the staff dashboard.

Default settings for this feature can be set from the 'Manage Personal Settings' page.

Note: ETO System Administrators manage which features display on the Navigation Bar.



Click the arrows to expand each section of the Navigation menus and view available features. Not all features are available to all staff but are granted by the ETO user role.

To-Do List: The To Do List is a system tool that can be utilized to manage work and provide alert reminders. The To Do list is populated when a touchpoint is recorded, and the Date of Next Contact feature is utilized.

New: This page can be configured by ETO System Administrators to display links for commonly used *new* actions.

My Favorites: Allows users to create a page of links or shortcuts for commonly used system features or reports.

Help: The page contains a help manual, training material and system support for the core product developed by Social Solutions Global, Inc. It does not contain Washington's ETO specific training material or help that is provided by ESD's help desk.

ETO specific training material and links to ESD's ticketing system is found on the [Workforce Professional Center](#) on the 'Technology' page under ETO 'Training resources'.

Participants

Click the arrow to expand the 'Participants' menu to explore all the features available to you depending on your ETO user role. Following is an explanation of the features:

- **Find Seeker** in WorkSource allows staff to conduct a site-wide search for a participant enrolled in any office using last name, SSN or case number
- **Add New Participant** allows staff to add a new participant to ETO following the guidance in [WIN0120](#)
- **Find Seeker in my Office** allows staff to conduct a search for a participant enrolled in staff's active office using last name, SSN or case number
- **Add Seekers to Office** allows staff to add a participant to their active office
- **Dismiss Participant** is a feature we do not use as its only function is to remove them from the staff's active office
- **Participant Eligibility** is a feature that is not functioning in Washington's ETO system

Hands-On Activity – System Navigation

Staff Dashboard

Go to your dashboard and explore all of the sections shown. Note this represents your work in the system.

- Explore all of the Widgets at the top of the staff dashboard.
- Explore all of the sections within the dashboard.

Seeker Dashboard

Search within an office location for a participant using Quick Search and access participant's dashboard. Go to the participant's dashboard and explore the information available.

- Explore all of the Widgets at the top of participant's dashboard.
- Explore all of the sections within the dashboard.
- Note the participant's dashboard represents work done for the participant, regardless of which staff completed the work.

Search within the site for a participant using Quick Search.

- Locate a seeker who is not active in the office location(s) you have access to.
- Do the above activities multiple times, with many different seekers.
- Add a participant who is not active in your active office and add them to your active office.

Messages

- Send a message to two staff members from within the site. Include yourself
- Send a message to all staff in one office location
- Access and read both messages

Lesson 3: Working with Participants

There are 5 ways a participant record is created in ETO.

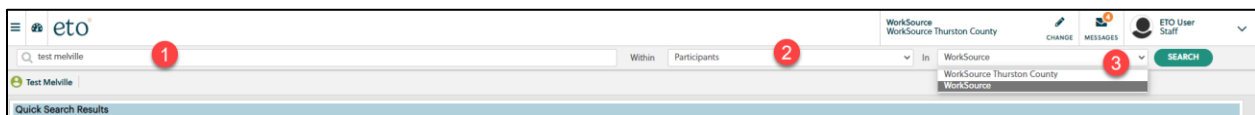
1. Data migration from our previous case management system 'SKIES'
2. Individual creates an Unemployment Insurance claim, and that data interfaces into ETO from UTAB creating an account
3. Participant creates a WSWA account, and the profile moves into ETO and creates an account.
4. In accordance with Workforce Information Notice 0081 known as WIN0081 and is used by those with the ETO Department Head role. WIN0081 provides guidance on how staff with the Department Head roles (Supervisors or MIS staff) can create an ETO participant account for those individuals who don't want to share their Social Security Number
5. Manually created by staff, following the guidance in WIN0120, called 'Add a participant record' for all staff.

Participant Search

ETO offers several different ways to search for participant records as detailed in Lesson Two: Navigating the System.

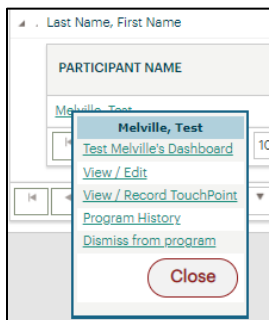
Quick Search

1. Start by entering the participant's name, SSN or case ID number in the quick search
2. Select 'Participants' for the 'Within' field
3. Select office location to search within your local office location or change to WorkSource to search entire site



If you search using 'WorkSource' the result will land you on the participants View/Edit page

If you search using your local office location (the participant must be enrolled in your office to return a result), you will have several options to select from.



Select Dashboard to view participant dashboard
 Select View/Edit to see a view of demographic data.
 Select View/Record TouchPoint to view a comprehensive list of all touchpoints recorded for seeker.
 Select Program History to view office enrollments
 Dismiss from program shows when office affiliation ended

Seeker/Participant Office History Widget

Click the Seeker/Participant Office History widget from the participant dashboard for current and past office location activation.

Test Melville

Program History for Test Melville

View Participant Information

Program History Audit Trail

Program

WorkSource Okanogan - Omak

Enrollment

Program Start Date

Program End Date

Projected End Date

Days in Program

Reason for Dismissal

Staff

Take Action

Currently Enrolled

4/4/2022

276

Staff Aue

WorkSource Pierce

Enrollment

Program Start Date

Program End Date

Projected End Date

Days in Program

Reason for Dismissal

Staff

Take Action

Currently Enrolled

6/6/2022

213

Staff Aue

Information displayed on the Program History page:

1. **Program:** Name of office location
2. **Enrollment:** Status of activation: Currently Enrolled (active) or Past Enrollment (inactive/dismissed); the term enroll or enrollment means when seeker is added to an office location.
3. **Program Start Date:** Date the participant was added into the office location.
4. **Program End Date:** Date the participant exited or was dismissed from the office location.
5. **Projected End Date:** Projected date for end of services/active enrollment.
6. **Days in Program:** Number of calendar days the participant is/was active in the office location.
7. **Reason for Dismissal:** Reason for dismissal (populates for past enrollments).
8. **Staff:** Name of the staff account that added the participant into the office location.
9. **Take Action:** Print past enrollment records, edit a record or delete a record.
10. **View Participant Information:** (top right) to navigate to the participant 'View/Edit' page.
11. **Program History Audit Trail:** (top right) to access an audit report for program history (refers to office location)

Automatic adding participant to office location: When a participant completes the registration process in WorkSourceWA (Job Match), the participant is instantly integrated into ETO and will be automatically added (made active) in the correct WDA office location(s) based on participant's zip code

Manual adding participant to office: Manual adding participant to office is done when a participant needs to be added to an additional office location.

Begin by opening the left side navigation bar, select 'Participant', then 'Add Seekers to Office'. Enter the participants case number or SSN (best way to ensure you are adding the correct participant).

Click search and the search results will display.

Based on the specified search criteria, the results page will display all records for participants that are not active in the current office location. Select the box next to the participant to be made active in the office location, then scroll to the bottom of the page. Program Start Date (refers to date participant is added to the office location) is set to default to the date the action is taken, or you can change the date if needed. Click 'Enroll Job Seeker' to complete process.

Below are all Job Seekers who are not currently enrolled in WorkSource Thurston County with last name like 'test'.

<input type="checkbox"/> JOB SEEKER	AGE	CASE NUMBER	DOB	SSN
<input type="checkbox"/> MEGAN TEST	33	15		
<input type="checkbox"/> REBECCA TEST	41	16		
<input type="checkbox"/> Test Test	22	24		

Add multiple participants to an office location at one time

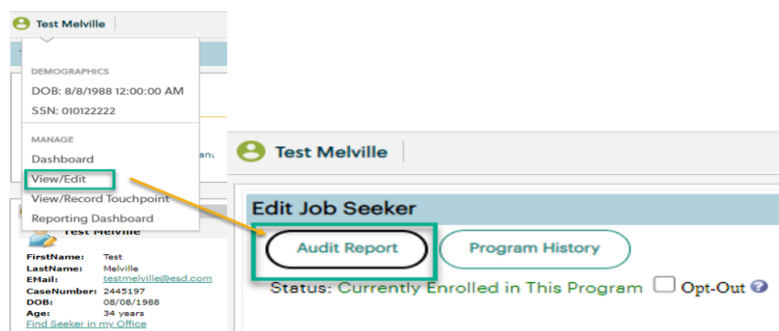
Multiple participants may be added into the same office location at one time.

To add multiple participants, first change to desired office location from the top of the screen (making this location 'active'). Select "Add Seekers to Office" and leave search terms blank. All participants not currently active in the program will display. Check the box next to each participant's name to be added. Scroll to the bottom of the page and complete process as described above.

Audit Report

When demographic data is updated in WorkSourceWA (Job Match), the update is instantly integrated into ETO. Audit tables provide the ability to view the history of changes made to demographic data.

From the dashboard, click on the View/Edit and then select 'Audit Report'



Staff will see a list of changes that have been made to a participant's demographic information.

Program		Modified By	Date Modified
No Filter		No Filter	
WorkSource Thurston County		Aue, Staff	3/9/2022
Demographic	Old Value	New Value	Audit Date
DOB		8/8/1988	3/9/2022 10:34:43 AM
First Name		Test	3/9/2022 10:34:43 AM
Last Name		Melville	3/9/2022 10:34:43 AM
SSN		010122222	3/9/2022 10:34:43 AM
Email		testmelville@esd.com	3/9/2022 10:34:43 AM
OptOut		False	3/9/2022 10:34:43 AM
Referral/Notification		False	3/9/2022 10:34:43 AM
Stid		0	3/9/2022 10:34:43 AM

Opt-In / Opt-Out

There are times when those who work for a WorkSource (WS) partner agencies are unable to find a participant in ETO. Follow these steps to determine if the participant has opted out of sharing data with non-ESD staff.

Participants are by default 'opted in' to sharing data with both restricted and non-restricted staff. Claimants are given the option to opt-out of sharing their data with non-ESD staff when they create an unemployment insurance claim. Those claimants who select to not share their data can only be found in ETO by ESD staff.

1. Type participant name, SSN or ETO customer ID in the Quick Search bar using the office you are logged into and click search. If the Total Participants result shows "0" they are:
 - a. Not enrolled in your office (in this case WSID); or
 - b. Opted Out of sharing data with non-ESD staff

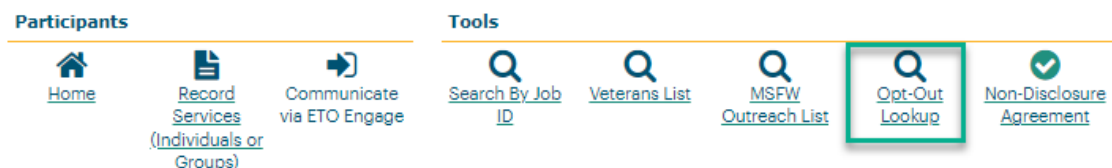
The screenshot shows the ETO Quick Search Results page. The search bar contains 'test test'. The 'Within' dropdown is set to 'Participants', and the 'In' dropdown is set to 'WSID'. The 'SEARCH' button is highlighted with a red box. Below the search bar, the results show 'Matches for test test: 0' and 'Total Participants: 0'. The 'Filtered by' section is empty. The bottom of the page indicates 'No items to display'.

2. To determine if the participant is enrolled in another office, change the "In" field to "WorkSource" to search all participants in ETO to determine if:
 - a. Participant is found, but needs to be [added to your office](#); or
 - b. If you work for ESD and the participant is not found using either search means they are not in ETO.

The screenshot shows the ETO Search Results page. The search bar contains 'test test'. The 'Within' dropdown is set to 'Participants', and the 'In' dropdown is set to 'WorkSource'. The 'SEARCH' button is highlighted with a red box. Below the search bar, the results show 'Matches for test test: 22' and 'Total Participants: 22'. The 'Filtered by' section is empty. A table of results is displayed with columns: Participant Name, SSN, CaseNumber, DOB, SKES Seeker ID, and Site/Enrollment. Two participants are listed: 'TEST, PROCTER, DEVER, FIRST' and 'TEST, TEST'. The 'TEST, TEST' row is highlighted with a red box.

Participant Name	SSN	CaseNumber	DOB	SKES Seeker ID	Site/Enrollment
TEST, PROCTER, DEVER, FIRST	301438	301438	2/24/1981	11853189	Currently enrolled in site
TEST, TEST	436709	436709	1/1/1988	1222070	Currently enrolled in site

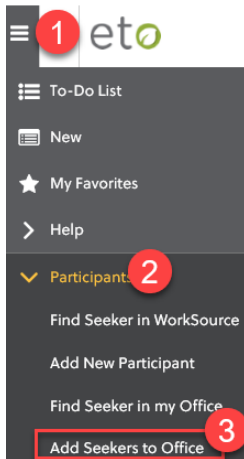
- c. If you work for a non-ESD partner agency and the participant is not found using either search could suggest they opted out of data sharing, and you need to run the '[Opt-Out Lookup](#)' widget found on your dashboard.



ADDING SEEKERS TO OFFICE

If participant is located, but not enrolled in your office, follow these steps:

1. Open the menu on the Navigation bar menu
2. Select "Participant"
3. Add Seeker to Office



1. Add seeker following the directions on the "Enroll Job Seekers into" (office you are logged into) click search
2. Find seeker from the search results, check the box next to their name
3. Click "Enroll Job Seeker"

Enroll Job Seekers into WSID

Search for Participants in WorkSource by last name and/or first name, Social Security Number, case number, or family name. To use all Participants leave the boxes empty.
1. Enter search criteria. 2. Select participant(s) to enroll. 3. Enter enrollment information; if multiple participants are selected with different dates, finish on the following page.

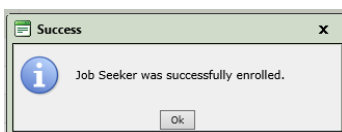
Last Name: First Name:
SSN:
Case Number:
Family Name:

Below are all Job Seekers who are not currently enrolled in WSID with last name like 'test' and first name like 'test'.

Job Seeker	Age	Case Number	DOB	SSN
<input checked="" type="checkbox"/> TEST TEST	32	436709	01/01/1988	
<input type="checkbox"/> Test WorkFirst Test	32	1752671	01/16/1988	
<input type="checkbox"/> Test TestDC	30	2034928	01/01/1990	
<input type="checkbox"/> test test0003	27	2034942	01/01/1993	
<input type="checkbox"/> test test0004	26	2034944	01/01/1994	
<input type="checkbox"/> test test0005	25	2034946	01/01/1995	
<input type="checkbox"/> test test0006	25	2034947	01/01/1995	
<input type="checkbox"/> Testing Tester	53	766489	06/21/1967	
<input type="checkbox"/> Testy Testter	14	2022789	02/12/2006	
<input type="checkbox"/> Testing DOB Tester 9	4	1804092	04/09/2016	

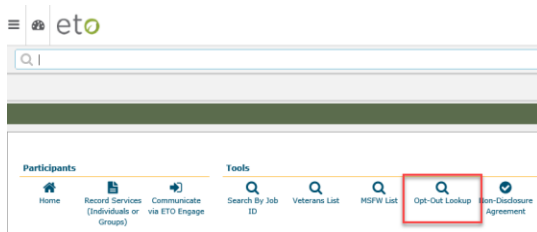
* Progress Start Date: 12/20/2020

When complete click OK. Your participant is enrolled in the office you are logged into.

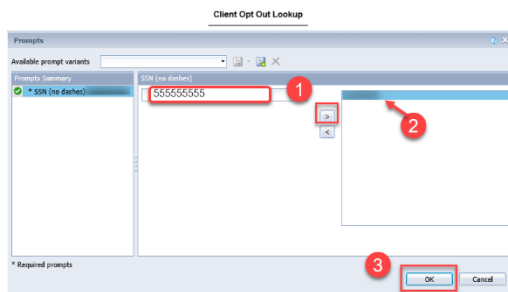


DETERMINING IF PARTICIPANT OPTED-OUT OF SHARING DATA (for non-ESD staff)

From your dashboard click the “Opt-Out Lookup” widget



1. Enter participants SSN
2. Click > to move SSN to prepare search
3. Click OK



If the participant Opted Out of sharing data with non-ESD staff, the search will return the message – **CLIENT OPTED OUT**. Follow your local area’s policy on how to Opt a participant into sharing data in ETO if the participant wants to share data.

Client Opt Out Lookup

Last Name	First Name	SSN	Monster Seeker ID	Offices Currently Serving	As Of Date	Is Opted-Out
TEST	TEST	CLIENT OPTED OUT				Yes

If the above table is blank then there are no participants in the system that match the prompts entered.

Please have the participant create a new account at Worksourcewa.com

If the participant would like to change their Opt In/Out status, please contact the ESD Office.

PROCESS FOR ESD STAFF TO OPT-IN PARTICIPANT TO ENABLE DATA SHARING

ESD staff can view and Opt-In participants who chose to Opt-Out of sharing data with non-ESD staff. Uncheck the Opt-Out box, scroll to the bottom of the page and click “Save”.

On the ‘View/Edit’ participant page, the opt-out feature will show, but only for staff who are **not restricted users**. If a participant changes their mind and wants to share data an ESD staff can make this change. Follow your local office procedure on this process.

TEST TEST

Edit Job Seeker

Audit Report Program History View TEST TEST's Dashboard

Status: Currently Enrolled in This Program ☒ Opt-Out

Do Not Edit Values on this Page - Instead, Navigate to the Job Match System.

First Name
TEST

Middle Name

Last Name
TEST

Suffix
--Select--

Email

SSN

Case Number
436709

DOB
1/1/1988
32 years

Cell Phone
() - -

Assigned Staff
--Select--

Alert

Monster Seeker ID

Office of Referral
--Select--

logoupload Choose File

SKIES Seeker ID
1232070

GO2WS ID

Date Added or Updated By GUIDE

SWV Number

Save

Note: Restricted users cannot make changes to a participant’s opt-in or opt-out selection. Seekers default to Opt-In status when account is created in Job Match. **Opt-out** can be set by editing a participant record via **View / Edit Participant**.

Reminder: The participant has to be added to the office you are logged into or you will not be able to edit this screen and Save will be greyed out. Follow the instructions found above to add seeker to your office.

Dismiss Participant from Office Location (Program)

The Dismiss Participant feature is not utilized in ETO. If a participant exits the system, it will be reflected in Job Match, and the information will flow to ETO.

Hands-On Activity – Search and View Job Seeker Records

Access a participant's dashboard.

In the General Information section, view the Demographic Details touchpoint. Open the Demographic Details dashboard and view information.

From the Seeker/Participant Office History widget, review the office history record of your participant. Note any dismissed or inactive office locations.

Using the participant profile feature, open the menu and access their View/Edit page. Note the demographic details displayed.

Access Review Seeker/Participant TouchPoints page.

Note all touchpoints taken are listed.

Note under staff column whether touchpoint was generated by WIT Integration (Job Match) or by a staff member.

Search within the site for a participant using Quick Search

- Locate a dismissed participant.
- Locate a participant who is not active in the office location(s) you have access to.

Add a participant into your local office. Add 3 participants at the same time to your local office

Repeat all steps above for many participants - repeat many times!

Lesson 4: Working with Employers

Basic employer account details are integrated from Job Match to ETO and can be viewed on the employer/recruiter's dashboard in the Entity Information section or via accessing the employer/recruiter's account page.

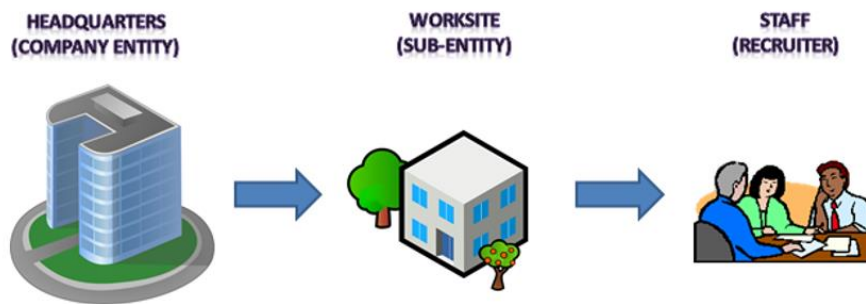
To ensure data integrity, basic demographic information about the employer/recruiter must always flow from WSWA (Job Match) to ETO. Making edits to attribute information in ETO must not occur. Instead, staff will impersonate the employer to make edits in WSWA, which will flow instantly to ETO.

Refer to lesson 8 instructions on impersonation. Refer to the [Workforce Professional Center Job Match](#) guidance manuals on working within WSWA.

Employer Structure

Employers have the ability to create a WSWA account on Employment Security Department's job match website. Creating a WSWA employer account establishes three account types described in the following structure:

- *Company Entity* is the primary record. Think of this as the headquarters building.
- *Sub-Entity* is the next level of record related to the *Company Entity*. Think of this as the worksite. If there is more than one worksite, there can be more than one *Sub-Entity* record under a *Company Entity*
- *Recruiter* represents a person within the company.



FullName	Address1	Zipcode	Show Entity Type	EntitySubType	Show Contact Info
Nikkis Nutella Creations (vw261167374wx)	123 Main St.	98112	Show Entity Type	Sub-Entity	Show Contact Info
Nikkis Nutella Creations (vw261167374wx_parent)			Show Entity Type	Company Entity	Show Contact Info

1 - 2 of 2 items

Employer or Recruiter Search

You can search for an employer by company or recruiter name, company 'X' code or recruiter ID number.

Log into ETO to begin searching by entering information in Quick Search:

1. Enter company or recruiter name, company 'X' code, ID number
2. Toggle the 'Within' field from Participant to Entities
3. Change the 'In' field from your active office to 'WorkSource' to search the entire ETO system for the company or recruiter

The screenshot shows the ETO Quick Search interface. The search bar contains the text 'Nikkis Nutella'. Below the search bar, there are two dropdown menus: 'Within' and 'In'. The 'Within' dropdown is currently set to 'Entities', and the 'In' dropdown is set to 'WorkSource'. A red box highlights the 'SEARCH' button on the right side of the interface.

This search produced the following results.

Quick Search Results				
FULLNAME	ADDRESS1	ZIPCODE	SHOW ENTITY TYPE	ENTITYSUBTYPE
Nikkis Nutella (ovw261167374wp)	123 Main St.	98112	Show Entity Type	Sub-Entity
Nikkis Nutella Creations (ovw261167374wp: parent)			Show Entity Type	Company Entity

Select 'Sub-Entity' to land on the page where you can view company information, twenty most recent employer services, ten most recent job postings, enter or review case notes.

Employer Dashboard

Dashboard of a 'Sub-Entity' employer account

Entity Information:

Entity: Nikki's Nutella (xw261167374wx)

Type: Employer
Sub-Type: Sub-Entity
Contact: 123 Main St, Seattle, WA 98112

Type of Employer: Private Sector
Company Affiliation: Nikki's Nutella Creations (xw261167374wx, parent)
Country: USA
Mail Address 1: 123 Main St
Mail City: Seattle
Mail State: Washington
Mail Zip: 98112
Mail Country: United States
NASIS Code: 31 (89)
Federal Employer ID Number: 43-3333333
Federal Contractor: No
No. of employees: 1 to 9 employees

Action Links:

- [View/Edit Entity](#)
- [Entity Program Information](#)
- [View Employer Touchpoints](#)

Most Recent (20) Employer Services:

Take Action	Date Completed	Type of Service	Employer Services	Completion Status
✖ ✕ ✖	4/20/2022	Order	All other customized services for employers	
✖ ✕ ✖	3/9/2022	Recruitment	Linked job order(s)	
✖ ✕ ✖	8/25/2021	Recruitment	Approaches for hard to fill jobs (Job Order follow-up/maintenance/Linked job order(s))	Successful
✖ ✕ ✖	1/8/2021	Recruitment	Linked job order(s)	
✖ ✕ ✖	1/7/2021	Recruitment	Linked job order(s)	
✖ ✕ ✖	7/30/2020	Recruitment	Linked job order(s)	
✖ ✕ ✖	7/7/2020	Business Assistance	How to avoid layoffs (Shared Work Program)	Successful
✖ ✕ ✖	5/27/2020	Business Assistance	Apprenticeship program creation	Successful
✖ ✕ ✖	2/28/2020	Recruitment	Job Order follow-up/maintenance	
✖ ✕ ✖	2/28/2020	Recruitment	Job Order follow-up/maintenance	

Most Recent (10) Job Postings:

Take Action	Date Completed	Identifier	Job ID
✖ ✕ ✖	12/9/2022	Test Posting - DO NOT APPLY	220861134
✖ ✕ ✖	10/31/2022	System Testing Job - Please Do Not Apply	249089230
✖ ✕ ✖	3/9/2022	Test - job posting	228397792
✖ ✕ ✖	8/18/2021	System Test Job - Please do not apply	228335564
✖ ✕ ✖	8/18/2021	System Test Job - Please do not apply	228335563
✖ ✕ ✖	9/24/2021	Solar Energy Business Engineer	223947278
✖ ✕ ✖	1/8/2021	Apple Retailer - test job posting	223369044
✖ ✕ ✖	1/7/2021	Agricultural Workers, Other	223331531
✖ ✕ ✖	11/6/2020	Test Job - DO NOT APPLY Cashier	221834100
✖ ✕ ✖	7/22/2020	Cashier	219074986

1. Widgets
2. Entity Information: overview of the employer account information, address, number of employee's, FEIN, Sub-Type
3. Action Links: View/Edit, Entity program information, view employer TP's from this screen
4. Most Recent (20) Employer Services: 20 of the employer's most recent services, recruitments, job listings, and follow-up activities
5. Job Postings: includes date completed, job order ID number, position identifier

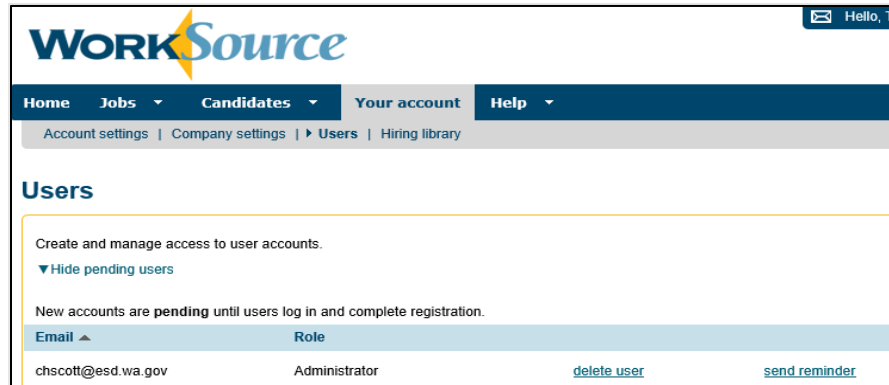
If you need to find the recruiter(s) associated with an employer, click the 'Find Recruiter Match' widget to produce a report with recruiter names. Click on the link to go to the recruiter dashboard.

These are the results for a recruiter search from a sub-entity account

Employer - Recruiter Match			
Name	Role	Company Affiliation	
	Recruiter	Nikki's Nutella (xw261167374wx)	Click here for recruiter dashboard
	Recruiter	Nikki's Nutella (xw261167374wx)	Click here for recruiter dashboard
	Recruiter	Nikki's Nutella (xw261167374wx)	Click here for recruiter dashboard
	Recruiter	Nikki's Nutella (xw261167374wx)	Click here for recruiter dashboard

Impersonation and Error Messages

- 'There was an error in impersonation'
 - The recruiter account was created but the account was not activated. Impersonate an active recruiter, click 'Your Account' tab, 'Users', 'Pending users', select recruiter account and send a reminder.



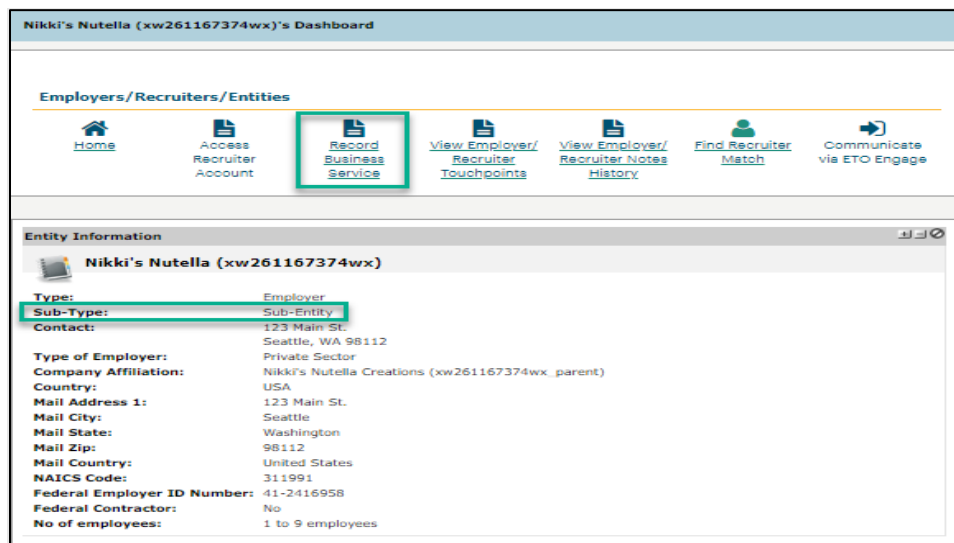
- Refresh session
 - ETO and WSWA are on separate timeout clocks. If you are experiencing problems with impersonation, log out of ETO and back in.

Employer Services and Case Notes

Employer service activity can be documented under the sub-entity or recruiter record. However, when several business services staff work with the same employer or multiple recruiters for a company, it is a best practice to document all activity into the sub-entity record and not in the 'Company Entity' or recruiter record. The benefits of this are services are under a common record.

Entering a Business Services TouchPoint

Start from the 'Sub-entity account, click on the 'Record Business Service' widget and land on the Employer Services tab



Employer Services tab

The TouchPoint opens on the 'Employer Services' tab where you can enter the following:

1. Identifier allows you to enter a description of the service
2. Use the dropdown menu to enter service on behalf of another staff, or leave blank
3. Contact Location/Method menu allows you to select method of service delivery
4. Enter the business contact person
5. Schedule follow-up alerts to add to your 'To-do' list
6. Select how you want to record service

Service Code and Notes tab

Click this tab to select the type of service you provided to the employer.

1. Identifier allows you to enter a description of the service
2. Use the dropdown menu to enter service on behalf of another staff, or leave blank
3. Type of Service (required field which opens interactive menus); once a selection is made:
 - a. A list of Employer Services displays and varies depending on the type of service selected
 - b. Once a selection is made for the employer service, the note displays to add a note
 - c. Service cannot be saved without these required fields
4. *Ignore Deactivated or legacy services code*
5. Upload Documents
6. Select how you want to record service

Review the new service(s) TouchPoint from your ‘Most Recent (20) Employer Services’ dashboard

Most Recent (20) Employer Services				
Most Recent (20) Employer Services				
Take Action	Date Completed	Type of Service	Employer Services:	Completion Status:
	12/5/2019	Recruitment	Approaches for hard to fill jobs Job Order follow-up/maintenance Recruitment of agricultural workers outside WA State	Successful

Dismiss (disable) Employer/Recruiter

When there is a need to disable an employer’s account, an admin will disable in WebAdmin. This action will flow through to ETO. Once disabled in WebAdmin, users can verify the employer is disabled by searching in ETO and noting the employer is not assigned to any office locations.

Employers/recruiter should never be directly disabled from ETO.

Hands-On Activity – Working with Employers

Search for an Employer

Use any employer account

- Search for your employer using quick search. Go to the employer's dashboard and explore all dashboard sections and all shortcuts.
- Explore the options available by searching first within the office location, and then within the site.
- Repeat above activities searching for a recruiter. Note the differences.

Lesson 5: Using TouchPoints

TouchPoints are electronic response forms used for collecting and viewing data. All data into the database is recorded via a touchpoint and can be reported out using ETO reports.

TouchPoints are configured specifically for participants or for entities (employers, recruiters, service providers). Each touchpoint form is assigned security settings. TouchPoint icons to view, edit or delete are viewable only to user accounts that have been granted the specified privilege in the touchpoint's security settings.

Data entered by participant or employer	Data entered by staff
Data entered by the participant or employer in WSWA Job Match is integrated into ETO via touchpoints. The data should be considered view-only in the ETO system and can be accessed through the associated touchpoint response form.	Data such as service activities and events are recorded by staff using a touchpoint form. This data can be edited or deleted based on permissions granted per touchpoint, per user, per program.

Recently recorded touchpoints are accessible through various dashboards in the system. A comprehensive list of touchpoint records can be accessed through the Review TouchPoints page.

TouchPoints can be **recorded** from many places within ETO. Accessing the list of available touchpoints is best done from the dashboard.

Recorded touchpoints can be **viewed** from many places within ETO. Accessing the recorded touchpoints is best done from the dashboard, or the Review TouchPoints page by clicking on the widget.

Workflow

Cross-references:

ETO allows four types of cross-references within a touchpoint form:

Seeker/Employer: allows lookup and selection of seeker or employer record. This is used frequently for selecting an employer or training provider's entity record when recording a service or plan for the seeker.

Demographic/Attribute: reflects the information that is currently present in the participant's demographic record as seen on the view/edit participant screen, or relevant ETO office location information such as program name and start date. (For entity records, the attribute information as seen on the view/edit entity screen.) In ETO, this may be used to document basic information about the participant (e.g., standard demographics of DOB or age) or by which office a touchpoint is being recorded.

Element cross-reference: Reflects the answer given to a specific question in another touchpoint recorded for the subject of the current touchpoint, in a read-only field. In Customer Management, this is used for reflecting basic information relevant to eligibility that was previously recorded in another touchpoint, such as information related to military service that was captured in the veteran details touchpoint.

Response cross-reference: this allows the lookup and selection of a previously recorded response to a specific touchpoint. The list of available responses shown may be automatically filtered on specific criteria. In ETO, response cross-references are used to lookup active contracts for plans and services.

Conditional Rules / Calculations

Many touchpoints in ETO have been configured with conditional rules and calculations to assist in the automatic assessment of eligibility and obligation of funds per training and supportive service plans.


Review TouchPoints

To access a comprehensive list of recorded touchpoints, navigate to the Review TouchPoints page
For seeker, click on the 'Review Seeker/Participant Touchpoints' widget on the seeker dashboard.






For employer or recruiter, click on the 'View Entity Touchpoints' widget on the employer or recruiter dashboard.

The Review TouchPoints page will display. Click the plus icon next to any of the touchpoint response forms listed. This will expand the section display information for each touchpoint recorded (e.g., date completed, last date updated, office location, and who recorded the response). TouchPoints generated via Job Match will be attributed to 'WorkSource WA' under the Staff heading.

TouchPoints recorded by staff will be attributed to a specified staff account.

Demographic Details							
Date Completed	Last Updated	Identifier	Collection	Program	Staff	Status	Take Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	No Filter	<input type="text"/>	
1/24/2015	11/24/2015			Administration	WorkSource WA		 

To work with recorded touchpoints, click the action icon to the far right of the touchpoint record.
Note: Icons will display only if access is granted to user role.

-  Eye icon - view data in touchpoint response form
-  Plus sign icon – record a new touchpoint form
-  Dashboard icon –this icon only is available when the primary touchpoint has been recorded. Clicking the icon will navigate staff to the touchpoint dashboard, where the secondary touchpoint will now be available to record.
-  Pencil icon - edit touchpoint responses
-  Trashcan icon - delete the touchpoint response form

Staff will use touchpoints to record services, activities, and events. TouchPoints are configured for participants or employers. Depending on the type of activity, touchpoints may be completed for a single participant or employer.

Single Participant or Employer TouchPoint

TouchPoint data can be entered from several locations.

1. Within a dashboard, click on the plus sign found in a dashboard part.
2. Click the 'Review Seeker/Participant TouchPoints' widget and click 'Take New' from one of the already used selections, or

The screenshot shows a web interface for 'Test Melville'. The main section is titled 'Review TouchPoints'. Below this, it says 'Review TouchPoints for Melville, Test'. There is a search bar labeled 'TOUCHPOINT NAME' with a dropdown arrow. Below the search bar is a list of touchpoint categories, each with a plus icon and a 'Take New' link:

- Basic Service [Take New](#)
- Case Note [Take New](#)
- Demographic Details
- Disability Details
- Exit
- Individualized Training and Supportive Services [Take New](#)
- MSFW Details
- Outcomes, Program Completion [Take New](#)
- Program Enrollment [Take New](#)
- State Funded Services [Take New](#)
- Tests and Results [Take New](#)
- Veteran Details
- WIOA Eligibility Application [Take New](#)

At the bottom of the list is a button labeled 'Take New TouchPoint'.

3. If the TouchPoint you intend to create is not shown, click 'Take new TouchPoint' and from the drop-down menu, select the name of the touchpoint to be recorded and click 'Continue.'

Complete all pages for each question within a TouchPoint. Pages are displayed via tabs across the top of the touchpoint. Required questions have a red asterisk and must be completed for the touchpoint to be saved. Date field on touchpoint is date contact is made. Date touchpoint is actually taken is time-stamped in the background.

Click one of the save option buttons located at the bottom of the form to save the data. Not all save options may be available for a specific touchpoint.

- **Save** - saves the record and generates a confirmation message.
- **Save and Record Similar** - saves the record and generates a confirmation message. A new blank touchpoint response form will display, ready to be recorded.
- **Cancel** - will not save data. A confirmation message will generate.
- **Save as Draft:** If a touchpoint has time restrictions on editing, save as draft allows updates regardless of the update period restrictions imposed by administrators. Some reports will not include touchpoints that are still in draft mode as they indicate that data entry is not yet complete.
 - *This feature is not available in all TouchPoints*

The recorded touchpoint can be viewed on the participants or employer's dashboard.

Schedule Date of Next Contact Alert

To show up in staff 'To-Do' list.

Some touchpoints will be configured with a Date of Next Contact element. If filled out, **and the touchpoint is saved**, an action will appear in the staff's 'To-Do' list.

Select within the 'Date of next contact' (to-do list reminder) feature:

- **Schedule Follow-up Alert** to show up on staff's To- Do list – or –
- **Schedule Follow-up Alert** to show up on Other Staff To Do List. When this option is chosen, choose the office location and staff account for the alert to appear.

Date of Next Contact:

☒ **Schedule Follow-up Alert** to show up on your To-Do list

☐ **Schedule Follow-up Alert** to show up on Other Staff's To-Do list

Alert Date: 7/7/2015 [+1](#) | [+7](#) | [+30](#) | [+60](#) | [+90](#)

Alert Type: ☒ Reminder to complete this TouchPoint
☐ Reminder to take a new TouchPoint

Alert Notes: Awaiting confirmation on data to complete this TouchPoint.

Indicate an alert date, either manually, or select the days out options (+1, +7, etc.). Days out can be combined: +60 twice will set the date 120 days.

Indicate the purpose of the To Do List Alert:

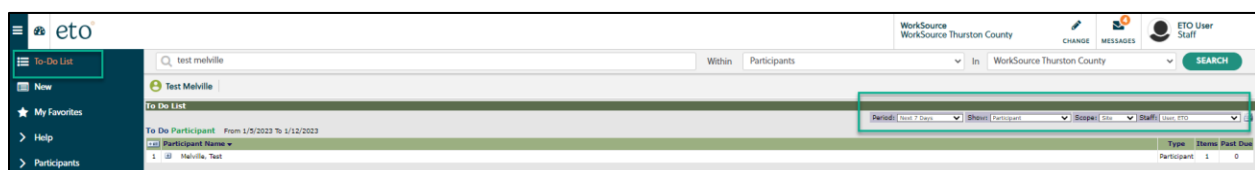
- A reminder to complete this TouchPoint - or –
- A Reminder to take a new TouchPoint. Select touchpoint to be taken.

Fill in alert notes. The touchpoint may also have a notes field. Alert notes are for staff's benefit and will not show up in the participant/employer's record. The regular notes field in the touchpoint will show up in the participant/employer's record.

Complete touchpoint with one of the Save options.

Review 'To-Do' items

Open the left side navigation and select 'To-Do List' to review your tasks. The list is filterable to help you manage your workflow. Tasks will remain there until action is completed.











Primary / Secondary TouchPoint

Some touchpoints will have a Parent/Child relationship, where the child touchpoint cannot be recorded unless the parent has been recorded. (Child touchpoints are often referred to as sub-forms.)

In a scenario where a Parent/Child relationship exists and the parent touchpoint has been recorded, locate the parent touchpoint on the dashboard to record a child touchpoint.




On the General Information participant dashboard, the touchpoint will be an underlined link. Click the link to be directed to the touchpoint dashboard.

General Information					
General Information					
Take Action	TouchPoint	Dashboard	Program	Date Completed	Date Last Updated
 	Demographic Details	Demographic Details Dashboard	WorkSource Thurston County	3/9/2022	3/9/2022
 	Disability Details		WorkSource Thurston County	3/9/2022	3/9/2022
 	Veteran Details		WorkSource Thurston County	3/9/2022	3/9/2022
 	MSFW Details		WorkSource Thurston County	3/9/2022	3/9/2022
+ New					

This opens the primary touchpoint's dashboard. Click '+ New' to record the desired secondary touchpoint.

To access an employer's primary touchpoint dashboard, and as an alternate way to access the primary touchpoint's dashboard for seekers:

Click 'Review Seeker/Participant Touchpoints' located on the participant dashboard. Locate the recorded parent and click the dashboard icon to the far right of the recorded touchpoint to be directed to the child touchpoint dashboard.

Demographic Details							
DATE COMPLETED	LAST UPDATED	IDENTIFIER	COLLECTION	PROGRAM	STAFF	STATUS	TAKE ACTION
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	No Filter	<input type="text"/>	
3/9/2022	3/9/2022			WorkSource Thurston County	Staff Aue		 

Recorded child touchpoints can be viewed on the **parent touchpoint dashboard** in one of the recent touchpoints sections.

Remember, the parent touchpoint dashboard is visible only when the parent touchpoint has been recorded. A parent touchpoint may have multiple child touchpoints. A child touchpoint can never be a parent touchpoint.

Note: A child touchpoint is not visible to record unless the parent touchpoint has been recorded. Once a child touchpoint is recorded, it will **not** show up anywhere except in the parent touchpoints dashboard.

Recording a Group Service TouchPoint

Recording a group service is a feature of ETO which is used to record basic services provided to a group of participants at an event or workshop.

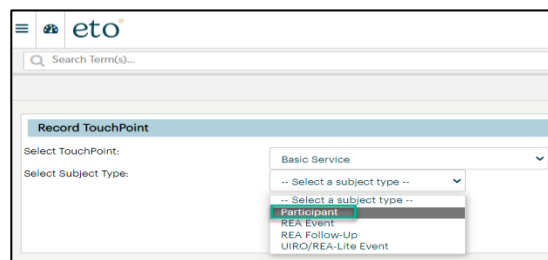
NOTE: Prior to recording a group service, each participant must be attached to your office. If a participant is not attached, you must first add to your office before recording the service.

You begin the process by:

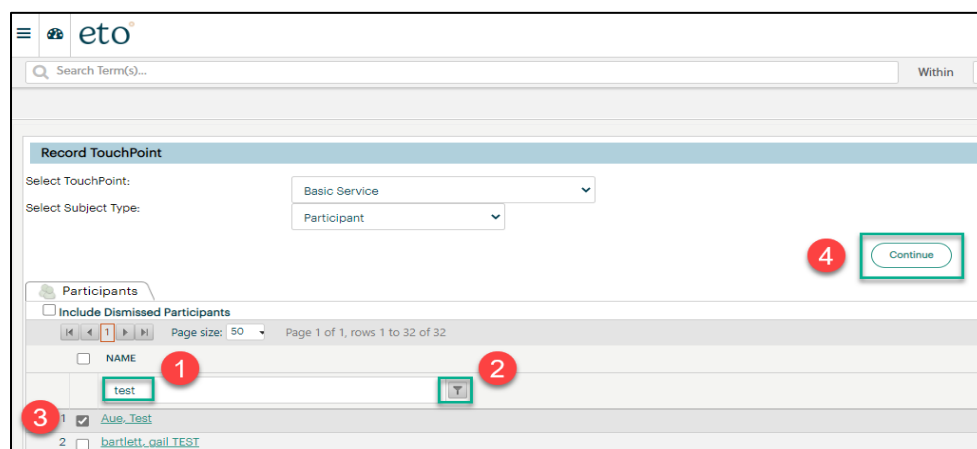
1. 'Click Record Services (Individuals or Groups)' from the staff widget menu, or
2. Open the left side navigation menu and select 'TouchPoints>Record New TouchPoints'

After the Touchpoint opens select the 'Record TouchPoint' screen, click the dropdown arrow, and select 'Basic Service' TouchPoint (TP). Note: *Although there are other services available from the menu selection, the only service allowed to take as a group is 'Basic Service'.*


After selecting 'Basic Service' the 'Subject Type' menu opens, select 'Participant'. *Although there are other subject types available from the menu selection, the only subject type allowed to take as a group is participant.*

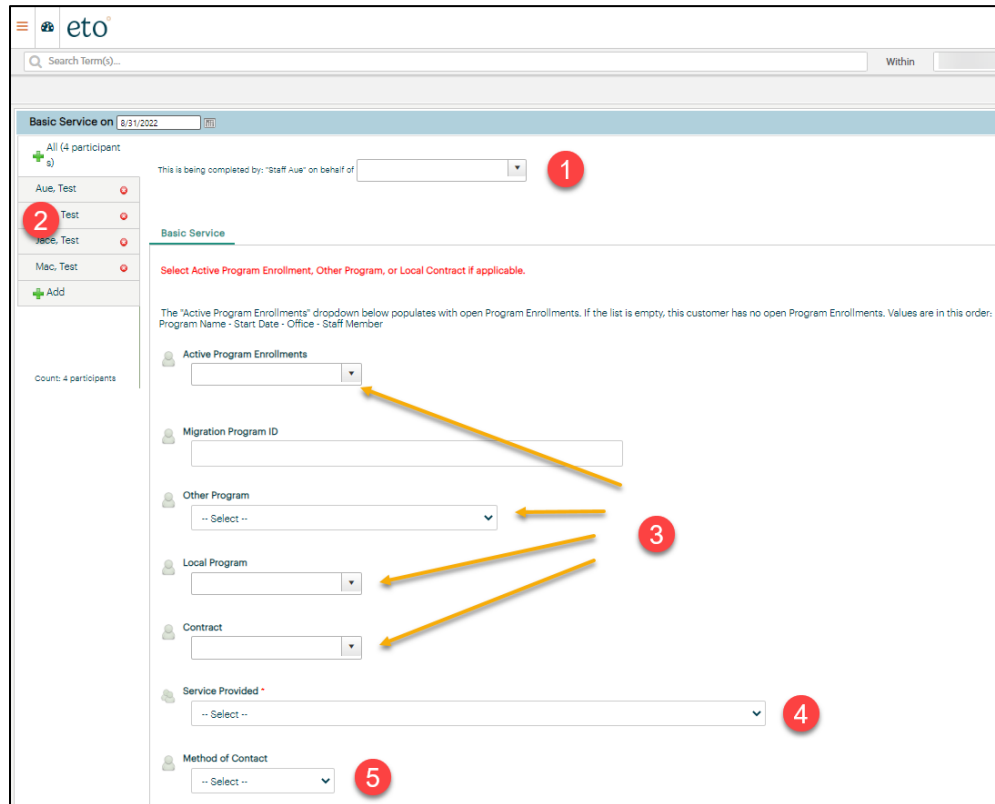


You are now ready to build your collection for those who attended your event from the 'Participant' menu by typing the participant's name, clicking the filter icon and click the box next to their name. Continue process 1-3 until you build the collection containing all the event or workshop participants. When finished click 'Continue'.



Steps to record a 'Basic Service' for a group of participants:

1. Services can be taken on behalf of another staff.
2. Participants in your group service collection.
 - a. Clicking the +Add allows you to add more participants.
 - b. Clicking the  allows you to delete participants.
3. If all participants are enrolled in the same Program Enrollments, Other Program, Local Program and Contract you can add it from this screen. If they are not enrolled in the same program or contract you add them individually by opening each participant record from the collection in step 2 and select the program or contract from the menus.
4. Select the required 'Service Provided' by clicking the arrow and opening the menu.
5. Select the Method of Contact by clicking the arrow and opening the menu.



The screenshot shows the 'eto' Basic Service form. On the left, a sidebar lists participants: 'All (4 participants)', 'Aub. Test', 'Test', 'Jesse. Test', 'Mac. Test', and an '+Add' button. A red circle with the number '2' is next to the 'Test' participant. The main form area has a header 'Basic Service on 8/31/2022' and a dropdown for 'This is being completed by: Staff Aue on behalf of'. A red circle with the number '1' is next to this dropdown. Below this is a section titled 'Basic Service' with a red instruction: 'Select Active Program Enrollment, Other Program, or Local Contract if applicable.' A note explains that the 'Active Program Enrollments' dropdown populates with open Program Enrollments. The form contains several dropdown menus: 'Active Program Enrollments', 'Migration Program ID', 'Other Program' (with '-- Select --'), 'Local Program', 'Contract', 'Service Provided' (with '-- Select --'), and 'Method of Contact' (with '-- Select --'). Red circles with numbers 3, 4, and 5 are placed next to the 'Other Program', 'Service Provided', and 'Method of Contact' dropdowns respectively. Yellow arrows point from these numbers to their respective dropdown menus.

Steps to record a basic service for a group of participants, continued:

6. If applicable, open drop-down menu and select a 'Provider'.
 - a. If not in drop-down menu you can type in provider name and course name.
7. Enter 'Activity Date'.
8. A 'Basic Service' is a transactional service so the start date autofills the end date (end date is locked).
9. Enter up to 2000-character note.
 - a. The case note displays on the participants record within the collection.
 - b. The case note does not display from the participants account 'Basic Service' TP.
 - c. Note is included in the 'Case Notes History' report run from the participant dashboard.
10. If applicable, upload any supporting documents.
11. Schedule follow-up appointments that will be added to your 'To Do' list.
12. Click 'Save and record similar' if you have more than one 'Basic Service' TP to record for this collection.
 - a. You will have the ability to add or remove participants from the original collection at this time
13. Click 'Save' if you are done adding services to this collection

The screenshot shows a web form titled "Provider and Course Details". It contains the following fields and controls, each marked with a red circle and a number:

- 6**: A dropdown menu for "Provider".
- 7**: A date input field for "Activity Date" with a calendar icon.
- 8**: A date input field for "Activity End Date" with a calendar icon.
- 9**: A large text area for "Notes".
- 10**: A "Select" button for "Uploaded Document".
- 11**: A checkbox for "Date of next contact (to-do list reminder)".
- 12**: A "Save and Record Similar" button.
- 13**: A "Save" button.

Additional text in the form includes "Provider Name (if not listed above):", "Course:", and a red warning at the bottom: "Select Active Program Enrollment, Other Program, or Local Contract if applicable."

After saving your work you will see the new TPs on the staff dashboard under 'My Most Recent (35) TouchPoints. Consider the following when accessing group services:

1. The screen shot shows the collection and all the participants are connected to one another
2. Clicking on any of the icons will open the entire collection
3. Eye opens the collection for view only
4. Pencil opens the collection for editing. This is where you can add or delete individual participants, add a program or contract and a case note
5. + opens the collection to add individuals
6. The 'garbage can' deletes the entire collection

Note: You will get a warning that this action will delete all members of the collection

Edit TouchPoint Responses

Some touchpoint response forms may allow specified user roles to edit the data collected in the form. These permissions are granted in the touchpoint's security settings. If the user role has editing privileges for a touchpoint response form, a pencil icon will display next to the touchpoint response form.

Most Recent (25) Basic Career Services				
 Most Recent (25) Basic Career Services				
Take Action	Program	Date Completed	Date Last Updated	Last Updated By
   	WorkSource Thurston County	1/5/2023	1/5/2023	ETO User

To edit data in touchpoint response forms click the pencil icon next to the touchpoint response form, complete all necessary updates in the form and click save.

Hands-On Activity – Using TouchPoints

Participants

- Explore the components and what your ETO role allows you to do with the Touchpoints (TP) on a participant dashboard:
 - Program enrollments
 - General Information
 - Most Recent Basic Career Services
 - Program Management Forms
 - Most Recent Individualized and Training Services
- Try to view, edit, delete, or take a new a TP from the participant dashboard
- Click the participant dashboard widget ‘Review Seeker/Participant Touchpoints’ and review a TP or take a new TP
- Add a new TP from the ‘Take New TouchPoint’ menu
- From inside a TP, explore the different ways you can save a TP
- Schedule a date of next contact to add to your ‘to-do’ list
- Review Primary/Secondary TP guidance above and find an example on the participant dashboard
 - Now find one by using the ‘Review Seeker/Participant TouchPoints’ widget
- Record a group service

Employers

- Explore the components and what your ETO role allows you to do with the Touchpoints (TP) on an employer dashboard.
 - Most recent Employer Services
 - Most recent Job Postings
- Click the employer dashboard widgets and review a TP or take a new TP
 - Record a service
 - Review Employer/Recruiter Touchpoints
 - View Employer/Recruiters Notes History






Lesson 6: Dashboards






ETO utilizes dashboards to view the system, view recent activity and take action or record services.

ETO has several different dashboards for various purposes. The two main dashboards in the system are the staff dashboard and the participant dashboard. (Reference dashboard navigation section for instructions on accessing staff and participant dashboards.)

Links are found throughout dashboards to facilitate easy navigation through the system.

When working with recent touchpoints (for example, a section labeled Program Management Forms) or specific services or activities, the dashboard will display various icons used to perform different actions. The following describes the function for each icon:

Program Management Forms					
 Program Management Forms					
Take Action	TouchPoint	Dashboard	Date Completed	Date Last Updated	Last Updated By
   	Basic Service		1/5/2023	1/5/2023	ETO User

- | | | |
|---|----------------|--|
|  | Eye icon | - View recorded data in touchpoint response form |
|  | Plus sign icon | - Record a new touchpoint form |
|  | Dashboard icon | - Access touchpoint dashboard, if applicable |
|  | Pencil icon | - Edit touchpoint responses |
|  | Trashcan icon | - Delete the touchpoint response form |

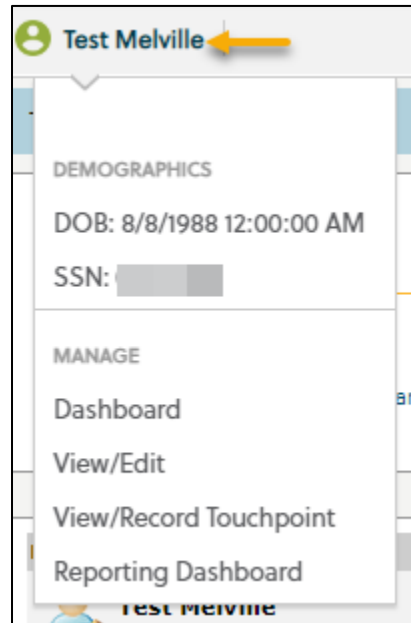
Note: icons display based on user permissions.

Standard dashboards

Staff Dashboard – Displays recent information recorded by staff for participants, employers, or service providers. Information is not specific to a subject type; it is the collective work of staff.

Participant Dashboard – Displays General Information and recent data recorded for participants. Access to additional information provided via links displayed on dashboard.

Participant Profile Quick View-- Click the participant's name to display the Fly-Out menu for a quick view of some important demographics and links to take further actions.



Employer Dashboard – described in **Working with Employers – Employer/Recruiter Dashboard**. Displays recent information recorded for the selected employer, e.g., employer services, job postings, quick link widgets, etc.

TouchPoint Dashboards - When touchpoints are created in a parent/child scenario, the parent touchpoint must be recorded first and only then is the child touchpoint available. TouchPoint dashboards are viewable once the parent touchpoint has been recorded. From the touchpoint dashboard, the child touchpoints is accessible to be recorded.

To access a touchpoint dashboard:

1. From the main dashboard, click the link in the dashboard column next to the applicable touchpoint form.
2. From the Review TouchPoint page, click the dashboard icon.

Hands-On Activity Dashboards

Review

- Navigate and investigate the sections of a participant dashboard
- Navigate and investigate the sections of an employer dashboard
- Navigate and investigate a touchpoint dashboard.
 - Access the touchpoint dashboard via the Participant dashboard
 - Access the touchpoint dashboard via the Review Seeker/Participant TouchPoints page
- Investigate the shortcuts on a participant and employer dashboards. Open each one.

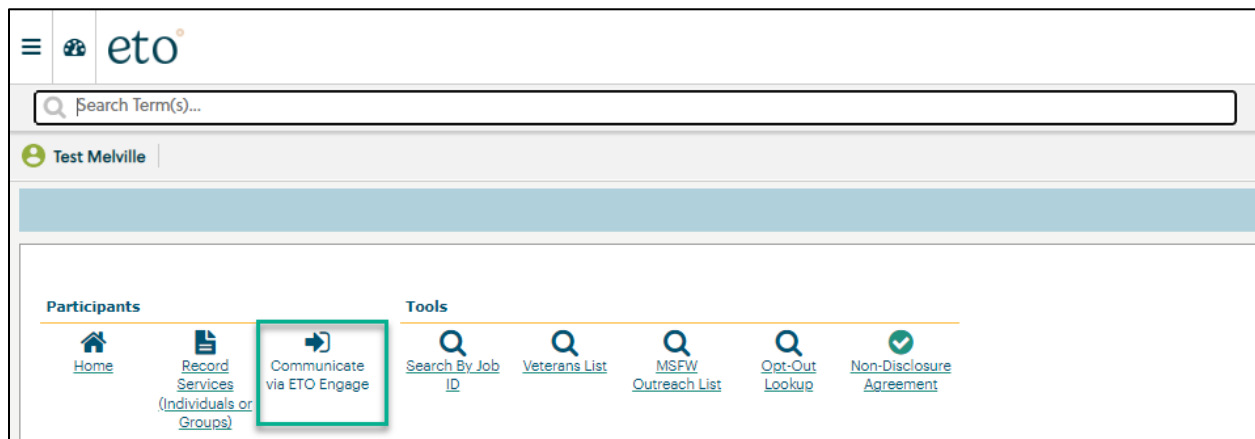
Lesson 7: ETO Engage

ETO Engage

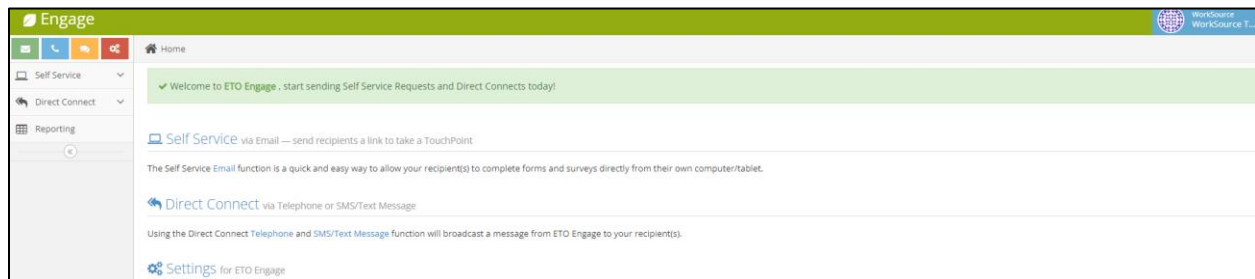
This provides two-way communication tools to participants and/or employers to provide reminders, deliver messages, schedule appointments, collect feedback, and initiate action.

ETO Engage can be used to schedule weekly email reminders to take a touchpoint in ETO, alert staff of an emergency issue with a text message or deliver a direct phone call.

To access ETO Engage, click 'Communicate via ETO Engage' from the staff dashboard



Note: ETO Engage and ETO cannot be open simultaneously. When the ETO Engage link is clicked, the ETO Engage software is opened.

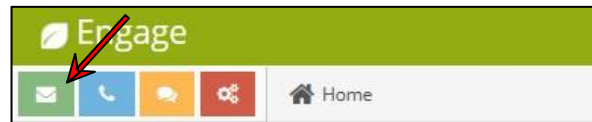


Self Service (Email)

To send an email, the email field must be completed with a valid email address for all participants. For employers, the email field must be completed within the employer contact(s).

A general email can be sent, or a link can be sent to complete a touchpoint. The recipient does not need a login to ETO and does not need an ETO account to complete the touchpoint.

To send email: Click the envelope icon at the top left of the engage page.



Select the recipients for the email. There are two options:

- **Participant** – Select ‘Participant.’ Type in the first or last name of a participant, select the appropriate name from the results displayed, and repeat to add additional seekers as necessary.
- **Employer** - By selecting entity as the recipient, the email will be sent to all the contact records associated with an employer. Select ‘Entity’, type the employer’s name (not the contact name) and a list of matches will auto-populate. Select the appropriate name from the results displayed and repeat to add additional employers as necessary.

A staff may select a combination of recipient subject types. For example, the same email can be sent to several participants and several employers. The different subjects will be highlighted with different colors and icons in the “To:” field.

Create the subject and message of the email.

The subject field is required and must be completed.

The body of the email is set to a default message designed to send a touchpoint link. Edit the body of the message to send a **general** email.

Email » send a link to your participant(s) to take a TouchPoint

To:

TestCompany (xw242609913wx) ✕

Seeker, Jim ✕

Seeker123, Test ✕

Participant: ▾
Search for Participants

Subject

Reminder: Job Fair July 8

Message

Dear {FirstName},

A Job Fair has been scheduled at Westin Community Center July 8, 9am-4pm.

Regards,
Your Case Worker

Use curly brackets to pull the subject's first and last name to personalize the message. Curly brackets can be added around a number of phrases to customize the content of the email. Below are the available commands (commands are case sensitive):

{FirstName} The first name of the participant or employer contact

{LastName} The last name of the participant or employer contact

{TouchPoint} NOTE: This functionality should not be used

Schedule or Send the email.

Schedule Email

Send Now

Select "Send Now" to send message immediately.

If no email address is attached to a participant or employer contact, a message will display: "Email address for recipient cannot be found." If an invalid email is attached to the seeker or entity contact record, the status will display as Sent.

- or -

Select “Schedule Email” to display the schedule rules. Select desired schedule and click “Save.”

Schedule » define delivery schedule for Self Service Request

Schedule this Self Service Request to be sent according to the rules below:

Schedule for
 05/06/2014 at 6:00 AM (UTC-05:00) Eastern Time (US & Canada)

Repeating
☐ Do not repeat
☒ Daily
☐ Weekly
☐ Monthly
☒ Every 1 day(s)
☐ Every weekday


Ending
☒ Do not end
☐ End after 10 occurrences
☐ End by 05/13/2014

After the email has been scheduled, check the scheduled email log by clicking the “Schedule” link under Self Service. This page displays the details of all scheduled emails. To cancel scheduled emails, click the blue box underneath the Action header.

Self Service » 1 self service request(s)

via Email
Schedule
Direct Connect
Reporting

✓ Your Self Service Request is now scheduled and listed below!

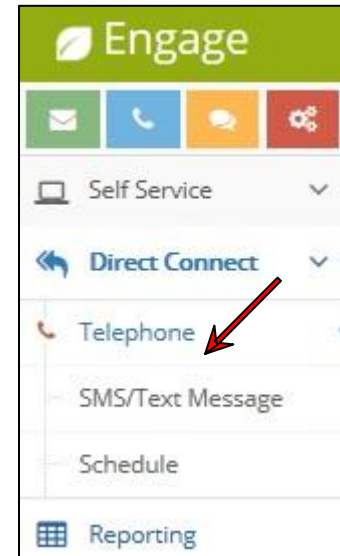
Recipient(s)	Created	Scheduled	# Sent	Recurrence	Action
Seeker123, Test	07/01/2015 2:06 PM	07/01/2015 2:15 PM	0	None	

Direct Connect (Phone Calls & Text Messages)

Use Direct Connect to send recipient(s) a pre-recorded phone message or text message.

Send a Pre-Recorded Message

Click Direct Connect from the left side of the screen and select 'Telephone.'



Select the recipient(s).

A standard phone demographic field must be completed with a valid U.S. formatted telephone number for all participants. For employers, the phone field must be completed in the employer contact(s). The system will always look at the home phone first. If there is no number in that field, it will look at the cell phone number field.

Select the type of Audio Message.

A. New Audio Message:

- Record Message via computer's microphone. Click 'Start Recording.' Review message under the 'Existing Audio Message' tab. Refresh the page if newly recorded message is not displayed.
- Record Message via Telephone: Enter the phone number associated with the phone to be used to record the message. An automated call will generate, requesting staff to record message. Record the message and press # when the message is complete. Once recorded, the message can be found under the 'Existing Audio Message' tab. Refresh the page if newly recorded message is not displayed.

B. Existing Audio Message: Select an existing (previously recorded) audio message to send to participants or employers. Note that these cannot be deleted once saved.

C. Text-to-Speech Messages: A call will be made to the selected recipient(s) using a text-to-speech engine. Type in the message to be delivered, and ETO Engage will translate from text to speech in the phone call. Be sure to test the text-to-speech message before sending.

There is a 4,096-character limit on the text that can be spoken.

Punctuation such as commas and periods will be interpreted as natural pauses by the speech engine.

When saying numbers, '12345' will be spoken as 'twelve thousand three hundred forty-five.' Whereas '1 2 3 4 5' will be spoken as 'one two three four five.'

The screenshot shows the ETO Engage interface for sending a message. At the top, there's a 'To:' field with a dropdown menu showing 'Tennis Clinic'. Below this is a 'Class:' dropdown. There are three tabs: 'New Audio Message', 'Existing Audio Message', and 'Text-to-Speech', with the last one being selected. Below the tabs, there's a text area for the message. The message text is: 'Hello! This is a reminder to bring an extra set of clothes for today's activity. Thanks and we'll see you later!'. At the bottom, there are two buttons: 'Schedule Call' and 'Start Call'.



Schedule or Start Call.

If the recipient does not pick up an ETO Engage call, ETO Engage will leave a voicemail for the recipient.

Selecting Schedule Call will display the schedule rules. Select desired schedule and click 'Save.'

The screenshot shows the 'Schedule' form in ETO Engage. The title is 'Schedule' with a subtitle 'define delivery schedule for Direct Connect'. Below this, it says 'Schedule this direct connect to be sent according to the rules below.' There's a 'Schedule for' section with a date field '05/19/2014', a time field 'at 1:00 PM', and a time zone dropdown '(UTC-07:00) Mountain Time (US & Canada)'. Below this is the 'Repeating' section with radio buttons for 'Do not repeat', 'Daily', 'Weekly' (selected), and 'Monthly'. There's a 'Recur every' field with '1' and a 'week(s) on:' section with checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. Below this is the 'Ending' section with radio buttons for 'Do not end', 'End after' (selected) with a field '4' and 'occurrences', and 'End by' with a date field '05/26/2014'.

After a Direct Connect phone call has been scheduled, check the scheduled call log by clicking the Schedule link under Direct Connect. This page displays the details of all scheduled calls. To cancel scheduled calls, click the blue box underneath the Action header to stop further calls from being sent.

Scheduled » 2 direct connect(s)						
✔ Your Direct Connect is now scheduled and listed below!						
Recipient(s)	Type	Created	Scheduled	# Sent	Recurrence	Actions
Smith, Jenni	Telephone	05/06/2014 12:09 PM	06/03/2014 12:22 PM	1	Monthly	
Abraham, Alba	Telephone	05/19/2014 12:45 PM	05/19/2014 1:00 PM	0	None	

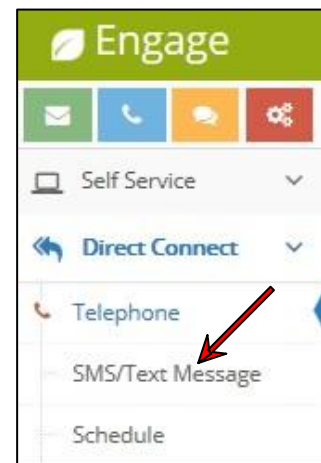
Send a Text Message

Select Direct Connect from the left side of the screen and click 'SMS/Test Message.'

Select the recipient(s).

The cell phone field must be completed with a valid U.S. formatted telephone number for all participants.

For employers, the cell phone field must be completed in the entity contact(s). Standard messaging rates will apply.



Compose message in text field.

SMS/Text » direct connect via mobile phone text message

To:

Resume Building A ✕
Jaime Smith ✕

Q Entity: ▾ search for recipient(s)

Using the form below, type the message you would like broadcast to your participant(s). A SMS/text message will be sent to each participant's *Cell Phone* number in ETO Software.

Message

Hello! Today's Resume Building Class has moved its location to Room 251.This message was sent from a notification-only number that cannot accept incoming messages. Please do not reply. Thank you.

Schedule Message

Send Message

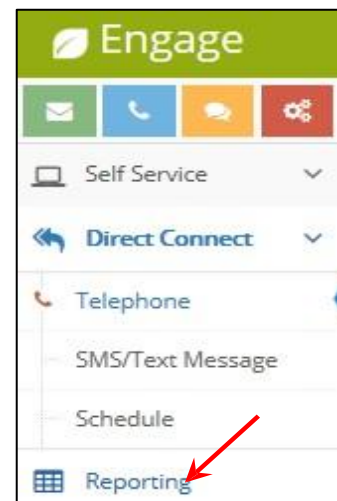
Schedule or send the Text Message

- Send Message will send your text message immediately. The details will be available to review after submission. If a cell phone number is not attached to a participant or employer contact, an error message will display. If an invalid cell phone number is attached to the participant or employer contact record, the status will display 'sent.'
- Selecting Schedule Message will display the schedule rules. Select desired schedule and click 'Save.'

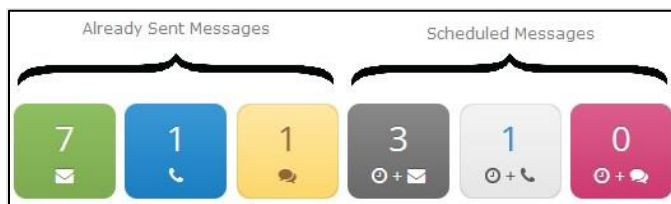
After a Direct Connect text message has been scheduled, check the scheduled text messages log by clicking the 'Schedule' link under Direct Connect. To cancel scheduled text messages, click the blue box underneath the Action header to stop further text messages from being sent.

Tracking & Reporting

To track all outgoing messages, click the reporting tab.

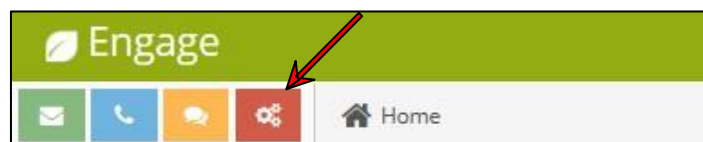


View the number of text messages, emails and phone calls sent.



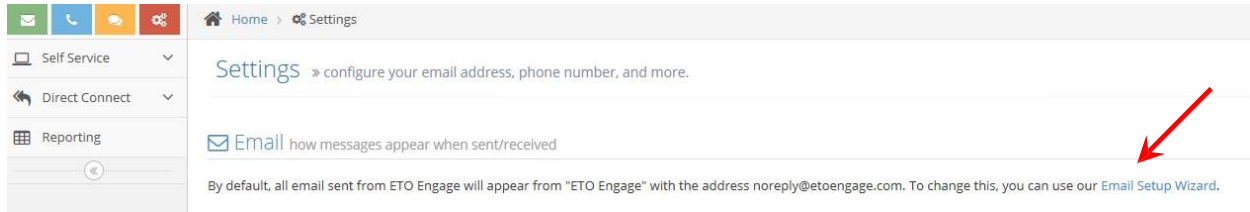
Settings

To change the settings, click the red gears icon on the top left



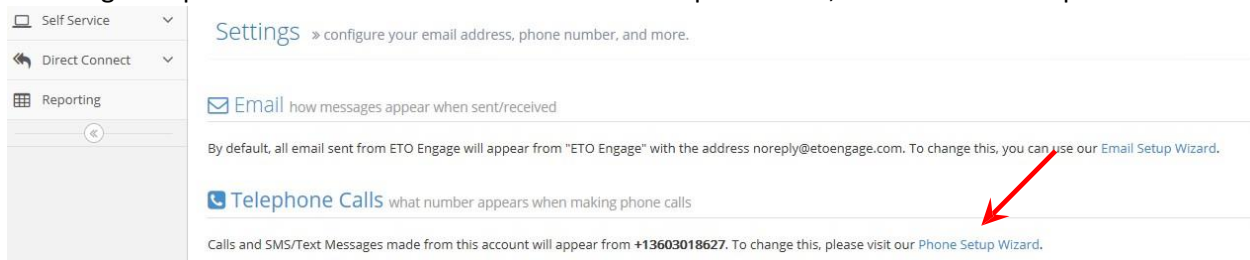
Self Service Settings

To change the email address and name that appear when a self-service email is sent, select 'Email Setup Wizard.'



Direct Connect Settings

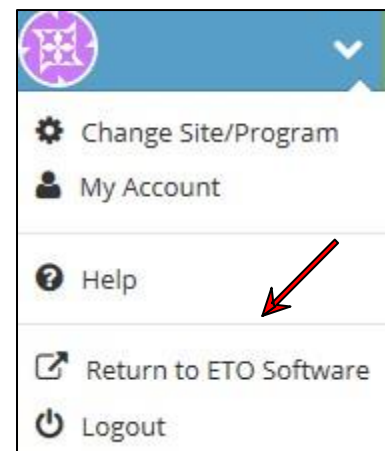
To change the phone number used for direct connect telephone calls, select 'Phone Setup Wizard.'



NOTE: SMS/Text Messages are sent from a generic number and cannot be changed at this time. In addition, incoming messages cannot be accepted from the SMS/Text Message number.

Returning to the ETO System

Currently, ETO Engage and ETO cannot be open simultaneously. If there is a need to return back to ETO software while in ETO Engage, click the blue bar in the top right-hand corner and click "Return to ETO Software."



Lesson 8: Impersonating Participants and Employers

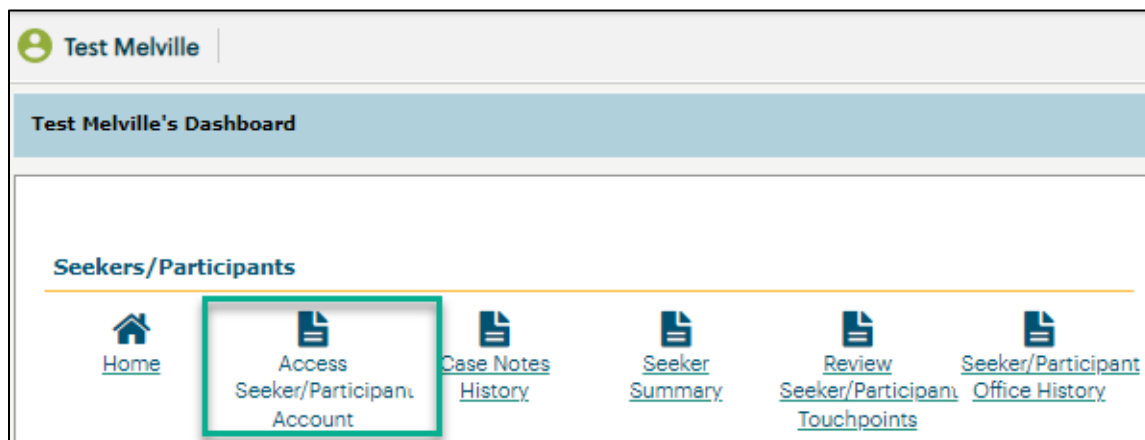
Single Sign-On Feature

Staff can assist a participant or recruiter in WSWA (Job Match) by impersonating them while logged in to ETO. No additional sign-on to WSWA is necessary.

Remember, it is always best to ask participants and employers to update their WSWA accounts themselves but if that is not possible, you must ask them for permission before impersonating them in WSWA. Edits made in WSWA will immediately integrate into ETO.

Impersonate a Participant

From the participant dashboard, select 'Access Seeker/Participant Account' widget to update profile information, offer resume support, conduct job searches and provide other support services available in WSWA.



NOTE: If a participant does not have a WSWA account profile, a message displays when you click the widget:

There was an error while accessing the participant's Job Match account.

Details:

The participant you are trying to access has not registered in Job Match. Please have that person directly access MyWorkSourceWA.com to complete their registration. Please close this window and return back to ETO.

Event reference: MID349254

Tip: A participant must have an email address in order to have a WSWA account profile. If no email address exists, a profile will not exist.

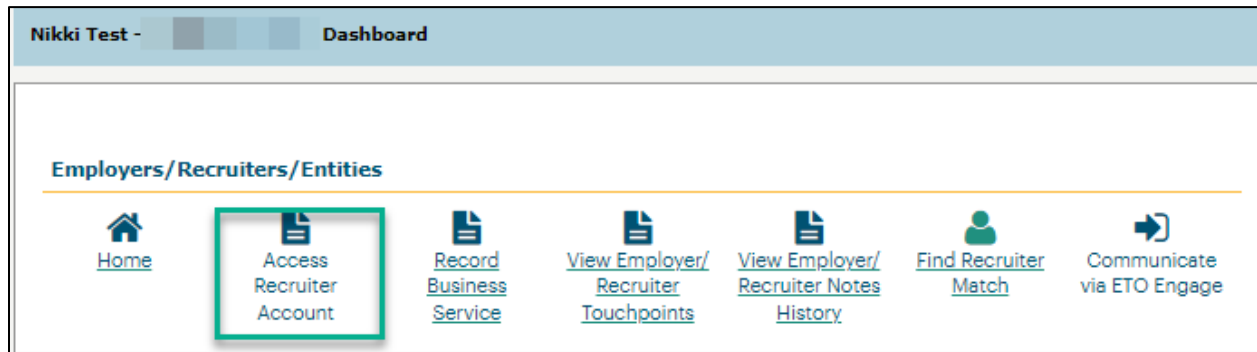
Follow the Workforce Professional Center (WPC) [Job Match guidance](#) for working in WSWA

IMPORTANT: To end the WSWA impersonation session, click 'End Session' in upper left corner.

Impersonate a Recruiter

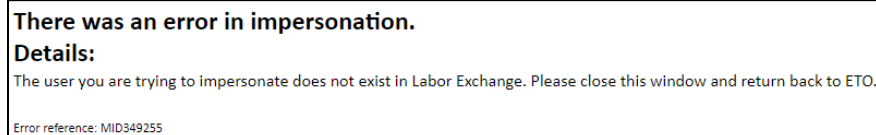
To edit data in an employer account, impersonate the recruiter (a person who enters data on behalf of the employer).

From the recruiter dashboard, select 'Access Recruiter Account' widget to update profile information, offer resume search support, manage job postings, and provide other employer-related support services.



Follow the Workforce Professional Center (WPC) [Job Match guidance](#) for working in WSWA

NOTE: If a recruiter does not have a WSWA account profile, a message displays when you click the widget:



IMPORTANT: To end the WSWA impersonation session, click 'End Session' in upper right corner.

Business Practice: Notify employers of any change/work done on their behalf.

Lesson 9: Utilizing Reports

Helpful hints for reports:

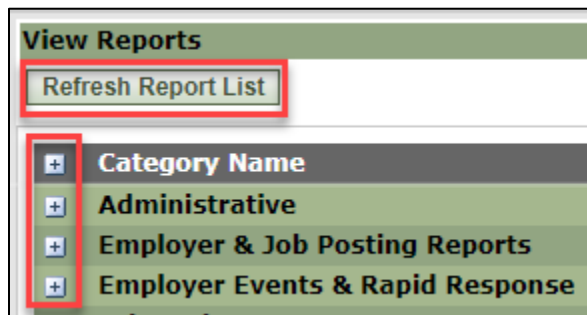
- **Always** click the 'Refresh Report List' every time you access the reports menu. Failure to do so means you could be pulling an older version of a report, or your report may time out.
- If you click on a report, and your screen flashes and goes back to the menu, you most likely are receiving a pop-up blocker. See [Pop-up Blocker guidelines](#) in this document below.
- Some reports pull a large amount of data, which can cause the report to time out. While some of the smaller reports allow for running a larger start/end date parameter, it is best to try and run the larger reports for a smaller start/end date parameter.

Accessing Reports

To run a report, open the left-side navigation bar, click on 'Reports' and then 'View Reports Menu'.

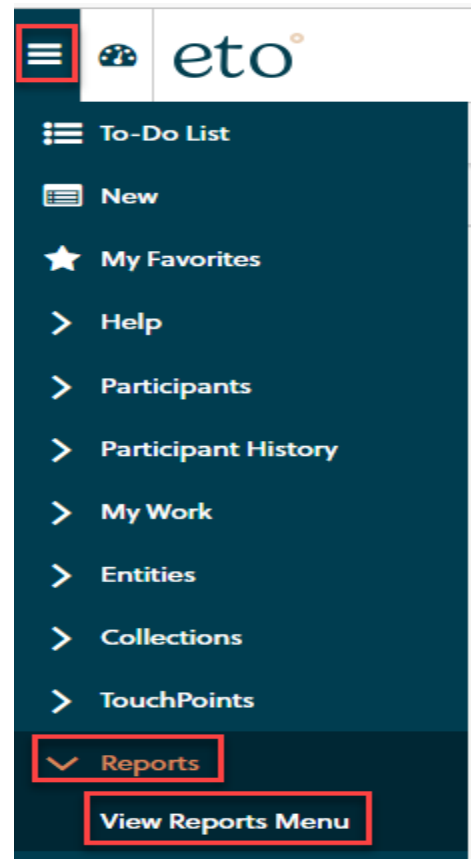
When the report menu opens, click the 'Refresh Reports List' button.

After clicking on the button, click on the '+' in front of the category for which you wish to run a report.



Locate the report and click on the report.

NOTE: If the screen flashes and goes back to the menu, remember to check for a pop-up blocker.



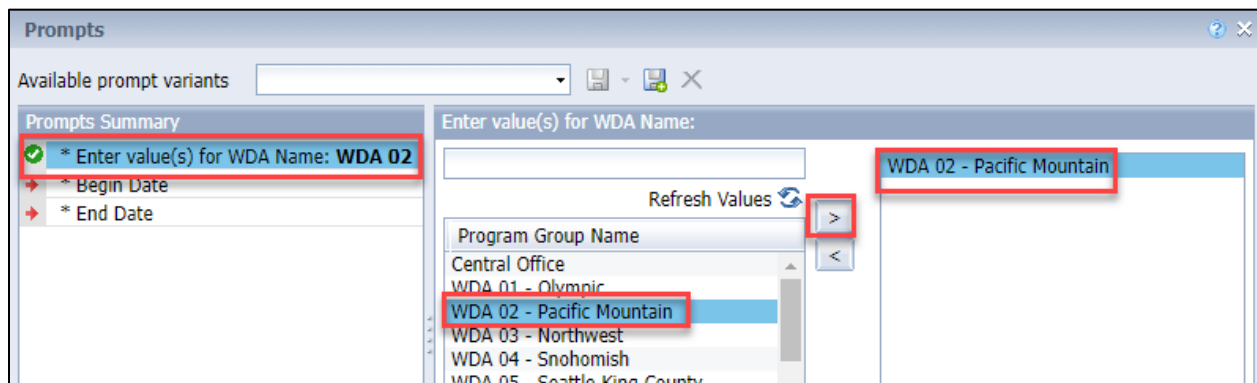
Initial Prompts

The Initial Prompt window for the select report opens.

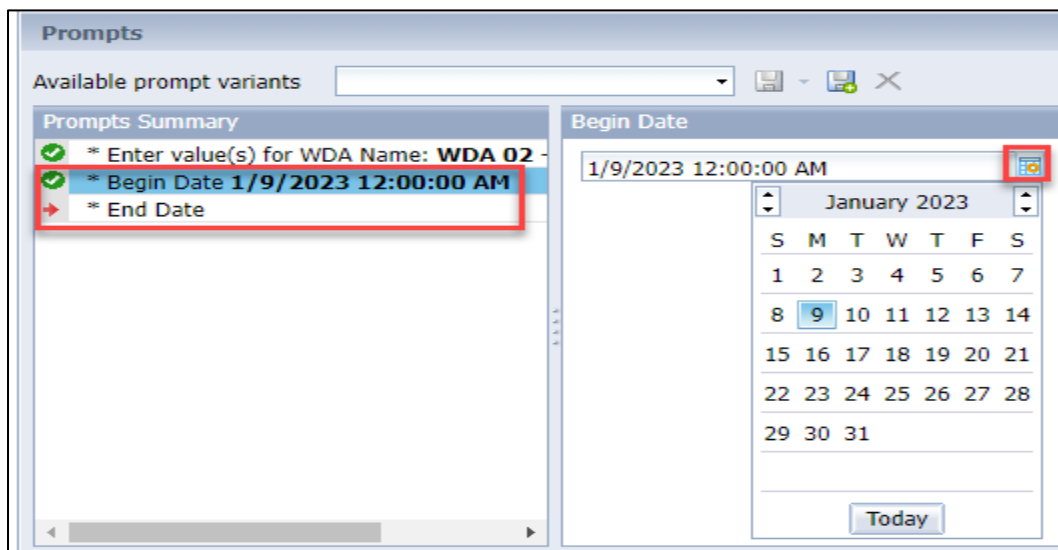
NOTE: This window is different for various reports; however, some standard prompts are:

- WDA
- Start Date
- End Date
- Office – this is typically an optional field and not required; however, it may be required on certain reports.

The way you select certain prompts also varies; sometimes you just get a WDA drop-down to select from, while other times you must select the WDA and click the > arrow to move into the open window to the right as shown in the example below.





You then select the Begin and End date parameters by clicking each of the fields, and then click on the calendar icon to navigate to the date you wish to run for both Begin and End:



Running a Report

After entering initial prompts, click OK. After clicking OK, you will see a 'Retrieving Data' window with a 'spinning circle' which means the system is working on pulling the data into your report.

Once this pop-up window disappears, the report data displays.

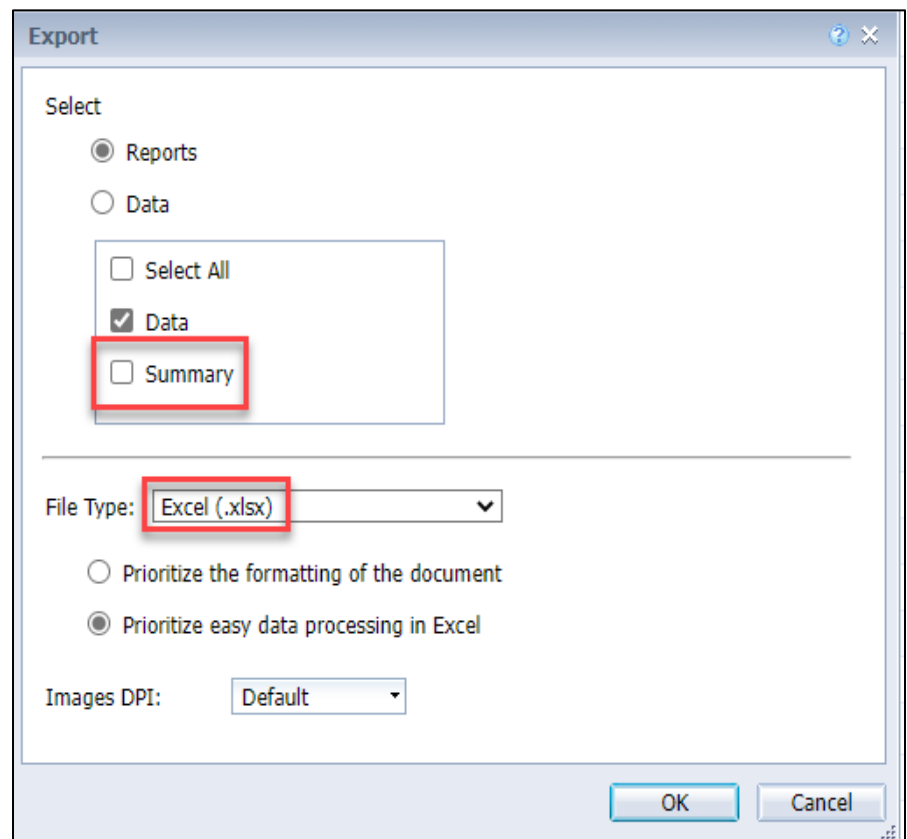
- If you realize you selected the incorrect prompts or wish to run a new WDA or start/end date, click on the Refresh icon -- .
- To export the report to Excel for filtering and sorting, click on the Export icon -- .

Exporting a Report

Once you click on the Export icon, a new pop-up window displays.

Some reports have just one tab, while others have multiple tabs that can contain various for the report, and others include a 'Query' or 'Summary' tab. If you do not wish to export the Query or Summary tab, uncheck the box as show below.

For filtering and sorting your report, click in the 'File Type' dropdown and select Excel (.xlsx); click OK.



The report will export and be available in your 'Download' folder on your computer.

Pop-up Blocker

When running reports in ETO, you might experience an issue where you click on a report in the menu and the report menu refreshes and doesn't open the actual report you selected.

This happens because you are receiving a pop-up blocker.

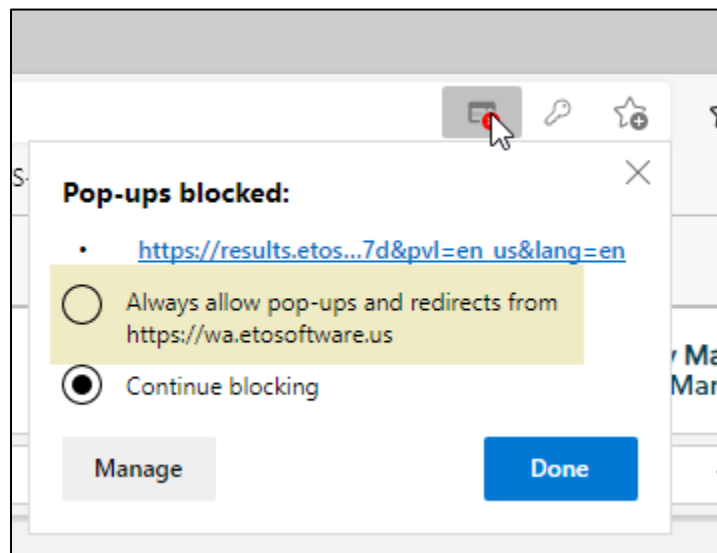
- Click on the mp4 icon below to watch a video; when you get the 'Open Package Contents' pop-up, click 'Open'.

NOTE: When the report is selected, look up in the upper right corner of the address bar to see the 'pop-up blocker' message.



Report_Pop-up_Blocker.mp4

- Once the message disappears, you will see a red 'x'.
- Click on the red 'x' and click on 'Always allow pop-ups and redirects from <https://wa.etosoftware.us>' to allow the pop-up blocker.



Hands-On Activity Reports

From the reports menu:

1. Click 'Refresh Report List'
2. Open the categories and explore the reports
3. Find and run a report that is critical to the work you perform
4. After running your report, export it to Excel, apply filters and play with the data you pull

Addendums

Review Staff To Do

From the left-side Navigation bar, select Program Administration, Review Staff To Do

This functionality allows managers to review their staff's To Do Today, To Do Participant, To Do Entity and To Do General lists.

- Select this option and choose which staff member's To Do list you want to view.

This option is also available through your own To Do List by selecting another staff name at the top of the list. This is set up on the Manage Programs page.

Review Staff Efforts

From the left-side Navigation bar, select Program Administration, Review Staff Efforts

This functionality allows managers and supervisors to review their staff's work. This option is available on the left-side Navigation bar under 'Program Administration'.

- Select this option and choose which staff member's work efforts you want to view.

See the [desk aid](#) for additional instruction.

View Confidential Case Notes

The Confidential Case Notes touchpoint has been configured to allow Staff Supervisors to view recorded data. Locate recorded touchpoint for participant and click the "eye" icon to view.

Glossary - Customer Management Terms

Active

A term used to define a participant's status in an Office Location (identified as a "program" in the system.) An "active" participant within a date range is someone who has an Office Location (program) start date before or within the selected date range and either no end date in the Office Location or an end date between the date ranges selected.

Add Seekers to Office (program) – also known as enroll or make active.

To bring a participant that exists in ETO into the selected Office Location (program) and enter an Office Location (program) start date. When a participant registers in Job Match, the seeker will automatically be added to an Office Location (program) based on the seeker's zip code. A manual add is done only in special circumstances.

Attribute

Characteristics of employers (Entities) that are not expected to change as a result of service (e.g., address, phone number, benefits provided, Special Hiring Features, Public Transportation Available, Affirmative Action plan, etc.). ETO comes with Standard Attributes; additional Attributes are created with the Attribute Wizard. Attributes are to employers (Entities) what demographics are to participants. Attributes appear on the Add New Entity and View/Edit Entity screens.

Collection

A Collection is a grouping tool that will be utilized for scheduling events and mass scheduling.

Certified ETO Administrator

An ETO software Administrator who has successfully completed the certification exam.

Custom Report

A query that is saved and shared on the Manage Queries screen so that it appears on the Custom Reports page, accessed below Reports on the Navigation Bar.

Dashboard

A dashboard provides a comprehensive view of recent activity or services. Dashboards are available for users (My Dashboard), participants, employers, TouchPoints and Collections. The staff is able to view, edit, or record data from the dashboard.

Demographics

Characteristics of participants that are not expected to change as a result of service (e.g., Name, Date of Birth, Race,). Participants enter their demographics during the registration process via Job Match: the data is then updated in real time into ETO and recorded via TouchPoints.

Dismiss

Term used when a participant is no longer active in an Office Location (program). When a participant is dismissed, the function requires a dismissal date. The dismissal date serves as the participant's "Program End Date" on the Program History page (where program refers to Office Location). Once a participant is dismissed, recording data for the participant will cease until the participant is re-added to the program.

Enroll – refer to **Add Seekers to Office**

Entities

A subject (typically third party) that impacts participants (e.g., employers or service providers.)

Efforts to Outcomes (ETO®) software

Software solution developed and distributed by Social Solutions Global (SSG), the leading provider of outcomes management software for human services. SSG's mission is to help people transform lives. Efforts are the intentional actions of the agency to support the participant within the design or logic model of the program. Outcomes are the participant-based measure that shows significant change in the situation or behavior in correlation to the efforts. The ETO portion of the WorkSource solution is powered by ETO® software.

ETO – see **Efforts to Outcomes**

ETO Results

An incredibly robust tool used to create custom reports utilizing Web Intelligence.

ETO Engage

ETO Engage equips users with two-way communication tools to provide reminders to participants or employers, deliver messages, schedule appointments, collect feedback, and initiate action.

Feeder Table

Drop-down menu choices found throughout features in ETO. The names of feeder tables are hardcoded (e.g., "Reason for Dismissal"), however options are populated by the Administrator (e.g., "Hard Exit.")

Links (aka Action Links)

The "Links" section located within the participant's dashboard is used to navigate to other parts of the system.

Log In

Term used to describe the process a user initiates when accessing the ETO system. From the login page, users will provide a username and password to access the system.

Log Off

Term used to describe the user-initiated process for exiting the ETO system. The link to log off the system is located in the upper right corner of ETO. For security purposes, users should be trained to log off of the system after work in the system is complete or at any time the user's device in which the software is running will be left unattended by the user. All users should log off of the ETO system before closing their browser to ensure data integrity.

Manage

Refers to the features in ETO used by Administrators to make additions and modifications to ETO, (e.g., Manage User Accounts). The majority of these features are found under the “Site Administration” component of the Navigation Bar.

Navigation Bar

The Navigation Bar (green panel located along the right-side of the ETO screen) is a comprehensive menu that can be utilized to navigate the system. Administrators can customize the content of this bar by adding or removing features based on business need. The Navigation Bar can be hidden or made visible by the user.

Office Location (identified as “Program” in the system)

Location where services are provided. A participant must be active in an Office Location (program) to record data/services for the participant. The Start Date, (the date a participant becomes active in the Office Location) and End Date (the date a participant is dismissed from an Office Location) is recorded for all participants.

Outcome

The “O” in ETO, outcomes can be tracked to measure and increase or decrease in attitude, performance, knowledge, etc. Assessments that include weighted elements that are completed more than once allow for comparative analysis, and outcome tracking.

Output

TouchPoint elements that are tracking neither an increase nor decrease and are used for counting.

Participant

Member of the target population; a recipient of service, known as participant in WorkSource.

Program

Office Location. A participant must be active in an Office Location (program) to record data/services for the participant. The Start Date, (the date a participant becomes active in the Office Location) and End Date (the date a participant is dismissed from an Office Location) is recorded for all participants.

Program Group

A component used to group Office Locations based business requirements.

Program History

Refers to the start date and end date history of a participant in an Office Location.

Program Start Date

Date a participant is made active (added) to an Office Location.

Program End Date

Date a participant is dismissed, or exits, from an Office Location.

Projected End Date

Date used to project when a participant will be dismissed, or exits, from an Office Location.

Query

A request for information from ETO that can only be completed by a user who has been assigned a Department Head role or above. Queries appear in a grid that can easily be copied and pasted into Excel. Queries can be built and saved and shared to be accessible to lower user roles.

Quick Search Menu

One of the Quick Tabs, located across the top of ETO that is used to search and navigate to a participant's or employer's record for viewing or recording data.

Quick Tabs

The green tabs located along the top of the ETO screen that serve as a means for quick navigation of the system.

Reason for Dismissal

Drop-down menu field that is required to be completed when a participant is dismissed from an Office Location (program.) This component is populated from a feeder table and is customizable by Administrators.

Reports- Insights

A mini-graph that displays on a dashboard, an Insight provides at-a-glance information about TouchPoint outcomes (an element that is either numeric or a weighted list.)

Reports- ETO Results Reports

Web-intelligence reporting tools used to visualize and report on outcomes and other measures.

These reports display in a typical reporting format that can be downloaded to other formats (e.g., Excel, PDF, and Word).

Reports- Standard Reports

A "pre-written" report included with ETO. Administrators have the ability to make these reports accessible to users.

TouchPoints

A touchpoint is an electronic form for collecting data in ETO. Data entered by participants and employers in Job Match is integrated in real time into ETO via touchpoint forms. Staff will also use touchpoints to capture data details for a variety of reasons, e.g., to record case notes, goal plans and progress, attendance, pre and post exams, as well as other types of information. All touchpoint data is reportable.

User Account

A unique login that is associated with a "User Role" and grants a user access to specific features and Office Locations in ETO. User Account credentials include a username and password.