

# My Caseload

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ETO Staff Dashboard Tool

“Favorites List”

# My Caseload Desk aid

The My Caseload Dashboard tool provides a way of tracking participant cases in a “Favorites” list on your Staff Dashboard in ETO. My Caseload allows staff to pull participants into a unique list that they can access quickly from their own staff dashboard. It is a great tool to use when you are working with participants that you did not enroll in a program. While it does not replace the Case Management Report it does provide an alternative way to view and access your participants.

- Staff will be able to add and remove participants to their individual My Caseload Dashboard without impacting program status or service delivery.
- Supervisors will be able to view staff caseloads. If necessary, it also allows supervisors to add to staff caseloads or quickly transfer the list of participants to a new staff member.
- My Caseload does not list participants by office of enrollment in the way that the Case Management Report does. Using My Caseload is a time-saver for staff that typically serve participants that were enrolled at a different office and have difficulty tracking their participants.

# How to add a Participant to My Caseload

1. From the staff dashboard - click the **+Add** in My Caseload
2. Locate your participant – Check the box to select them
3. Fill out your details – Caseworker relationship, Caseload Status (These fields are optional)
4. Click Save and then Return to Dashboard

**My Caseload**

**+ Add**

PARTICIPANT	CASEWORKER RELATIONSHIP	CASELOAD STATUS	START DATE	TAKE ACTION
TEST LINDER	TAA	My Customer	12/19/2022	✕
Test Student	TAA	My Customer	12/19/2022	✕

**My Most Recent (35) TouchPoints**

Take Action	TouchPoint	Dashboard	Program	Name	Date Last Updated	Identifier
	WorkFirst Activity Log		WorkSource Thurston County	WorkFirst@17_Test	12/2/2022	
	WorkFirst Participant		WorkSource Thurston County	WorkFirst@17_Test	12/2/2022	
	Non-Disclosure		WorkSource Thurston County	WorkSource Thurston County	9/7/2022	
	Non-Disclosure		WorkSource Thurston County	WorkSource Thurston County	9/1/2022	

**Add Caseload**

**Note:** Once there is an end date on a caseload, the participant will no longer be visible to the caseworker if caseload security is enabled, regardless of whether or not the end date is in the future. This page saves dynamically. Once a participant is selected or unselected, they will be added or removed from the caseload without the need to save.

Staff: Donetta McCormack

**Use filters to search**

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Name	SSN	DOB	Zip Code	Caseworker Relationship	Caseload Status	Caseworker
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--Select--	--Select--	--
<input type="checkbox"/> .melody .				--Select--	--Select--	
<input type="checkbox"/>				--Select--	--Select--	

**Check the box to select the participant**

# Get Directly to the Participant Dashboard from My Caseload

From My Caseload, click on the **Participant name** – You will be taken to the Participant’s dashboard

**My Caseload**

**My Caseload**

+ Add

PARTICIPANT	CASEWORKER RELATIONSHIP	CASELOAD STATUS	START DATE	TAKE ACTION
<a href="#">Test Student</a>	TAA	My Customer	12/19/2022	X

**Test Student**

**Test Student's Dashboard**

**Seekers/Participants**

**TAA Functions**

**Caseworkers**


**Test Student's Caseworkers**




Take Action	Staff	Start Date	End Date	Caseworker Relationship
	Staff MacLennan	9/2/2022	Pending	
	Donetta McCormack	12/29/2022	Pending	TAA
	Rebecca McGinnis	10/31/2022	Pending	VETS

# How to modify an item in My Caseload

1. From My Caseload, click on your participant's name to go to their dashboard
2. In the Caseworkers section, click the pencil next to your name
3. Edit as needed
4. Click Save

Caseworkers

Test Student's Caseworkers  Edit

Take Action	Staff	Start Date	End Date	Caseworker Relationship
	Staff MacLennan	9/2/2022	Pending	
	Donetta McCormack	12/29/2022	Pending	TAA
	Rebecca McGinnis	10/31/2022	Pending	VETS

**Caseworker**

Staff: **Site McCormack**

Start Date: \*  

End Date:  

Caseload Status:

Caseworker Relationship:

Dismissal Reason:

# How to Remove a participant from My Caseload

1. Click on the participant's name in My Caseload to go to their dashboard.
2. In the Caseworkers section, click the pencil next to your name in the **Take Action** column.  
**Note:** There may be more than one caseworker.
3. Enter an **End date** and a **Dismissal reason**.  
**Note:** End Date cannot be in the future. Caseload Status and Caseworker Relationship are optional fields.
4. Click **Save** to complete the step

PARTICIPANT	CASEWORKER RELATIONSHIP	CASELOAD STATUS	START DATE	TAKE ACTION
Test Student	TAA	My Customer	12/19/2022	X

Caseworkers

Test Student's Caseworkers

Take Action

Staff

Staff McCormack

Test Student

Caseworker

Staff: Donetta McCormack

Start Date:\* 12/29/2022

End Date:

Caseload Status: My Customer

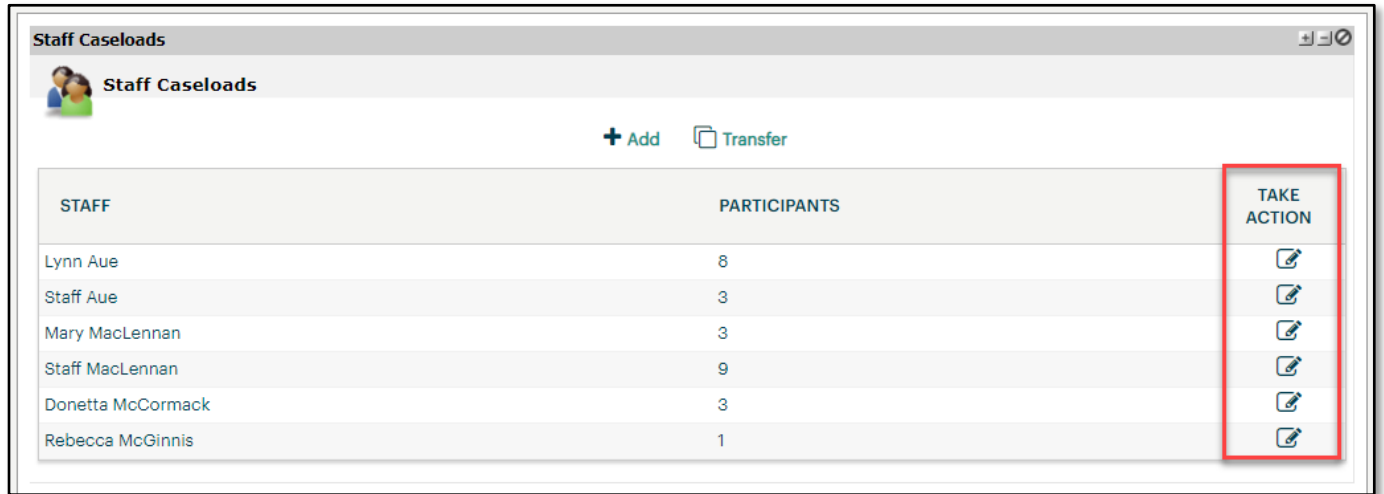
Caseworker Relationship: TAA







Dismissal Reason: --Select--

Cancel Save

# How to view Staff Caseloads

Available to ETO roles: Program Manager & Above



STAFF	PARTICIPANTS	TAKE ACTION
Lynn Aue	8	
Staff Aue	3	
Mary MacLennan	3	
Staff MacLennan	9	
Donetta McCormack	3	
Rebecca McGinnis	1	

1. On your staff dashboard, Locate the Staff Caseloads dashboard Tool
2. You are able to view:
  - A list of staff who are using My Caseload from the **office** that you are logged into.
  - How many participants they are managing
3. Actions you can take:
  - Add to another's Caseload
  - Modify/remove from another's Caseload
  - Transfer another's ENTIRE Caseload

# How to add a participant to another's My Caseload

Available to ETO roles: Program Manager & Above

1. Locate the Staff Caseloads dashboard tool and click on **+Add**
2. Click the **Staff** dropdown and choose a staff member from the list.
3. Add participants
  - Use search filters to find the participant that you want
  - Click the box next to the name of the participant to select it

STAFF	PARTICIPANTS	TAKE ACTION
Lynn Aue	8	
Staff Aue	1	
Mary MacLennan	3	
Staff MacLennan	9	
Donetta McCormack	6	
Rebecca McGinnis	1	

**Add Caseload**

**Note:** Once there is an end date on a caseload, the participant will no longer be visible to the caseworker if caseload security is enabled, regardless of whether or not the end date is in the future. This page saves dynamically. Once a participant is selected or unselected, they will be added or removed from the caseload without the need to save.

Return to Dashboard Save

Staff: Donetta McCormack

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<input type="checkbox"/>	Name	SSN	DOB	Zip Code	Caseworker Relationship	Caseload Status	Caseworker
<input checked="" type="checkbox"/>	AMBER		1/20/		TAA	Pending	Donetta McCormack; Lynn Aue; Staff MacLennan; Rebecca McGinnis
<input checked="" type="checkbox"/>	EDDY		9/23/		TAA	Follow Up	Donetta McCormack; Staff MacLennan
<input checked="" type="checkbox"/>	KENNETH		1/21/		TAA	Enrolled	Donetta McCormack; Lynn Aue; Staff MacLennan

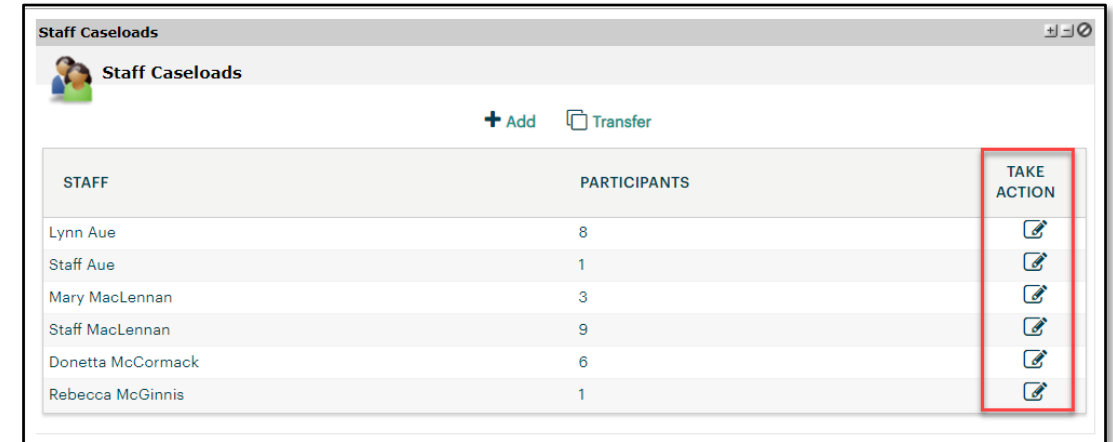
Don't forget to save! 😊



# How to Remove (or Modify) a participant from another's My Caseload

Available to ETO roles: Program Manager & Above

1. On the Staff Caseloads dashboard tool, click the Pencil in the **Take Action** column next to the staff member whose participant you want to remove
2. Locate the participant you want to remove;  
**Note:** Use search filter in the Caseworker column to easily locate all participants for that case manager
3. Scroll to the right - add an **End Date** and **Reason for Dismissal**  
**Note:** If making changes, skip this step. Adding an end date will remove the item from the list.
4. Click **Save**, then **Return to Dashboard**



Staff Caseloads

+ Add Transfer

STAFF	PARTICIPANTS	TAKE ACTION
Lynn Aue	8	
Staff Aue	1	
Mary MacLennan	3	
Staff MacLennan	9	
Donetta McCormack	6	
Rebecca McGinnis	1	

Start Date	End Date	Reason for Dismissal
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	--Select--
<input type="text"/>	<input type="text"/>	--Select--
<input type="text"/>	<input type="text"/>	--Select--
11/16/2022	<input type="text"/>	--Select--
<input type="text"/>	<input type="text"/>	--Select--
11/16/2022	<input type="text"/>	--Select--
11/30/2022	<input type="text"/>	--Select--
11/30/2022	<input type="text"/>	--Select--

# How to transfer another's Caseload

Available to ETO roles: Program Manager & Above

1. On the Staff Caseloads dashboard tool, Click **Transfer**
2. Choose a staff person in the drop down – transfer caseload **FROM**
3. Choose a person to transfer the caseload **TO** by clicking the box next to their name
4. **Note:** clicking in the box will IMMEDIATELY start the transfer – There is no way to back out or reverse this process.

## Pro Tip:

Take a screenshot of the list before transferring. If you make a mistake, you will be able to identify the records you transferred.

