



**State of Washington  
Customer Management**

**Staff Level User Guide - Part 2**

**Version 3**

**March 2016**

DRAFT

## Customer Management

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## Training Objectives

Definition: Staff Level user provides data entry for services

After completing this training, you will be able to:

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

Duration

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

## Lesson 1: Getting Started

### System Requirements

#### Hardware Compatibility

Customer 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 Compatibility

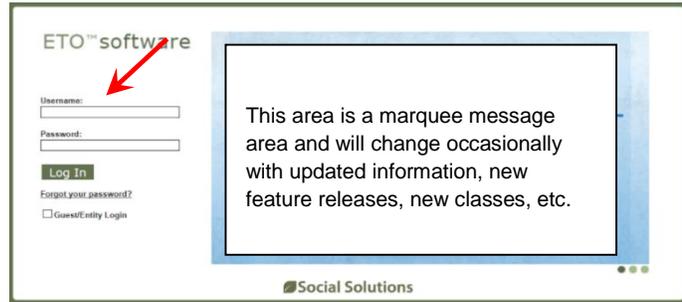
Customer Management software is accessed through the internet. It is highly recommended that Internet Explorer (IE) be used as the browser for the WorkSource solution.

Customer Management software is only compatible with Internet Explorer versions 9, 10 and 11. Other browsers, such as other versions of IE, Firefox, Google Chrome, Safari, may appear to function properly, but the feature may not function or save properly.

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

## Log in

Access Customer Management software's secure website:  
**secure.etosoftware.com.**



Enter user name and temporary password provided by site administrator.

Note: currently, the software is fully compatible on the IE platform only. If using Chrome or Firefox, some features will be blank, or unresponsive. With each new release, new and updated features will be made fully compatible with all platforms.

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

On first login, complete a registration page. Ensure ZIP code and time zone are accurate. Create a new **permanent** password. Check the box "I agree to the Social Solutions Terms of Use." Click "Save."

All future logins will require the permanent password.

Note: After go-live and upon completion of training, users will have access to both the training site and production site.

You have access to the sites below.

Select an enterprise and site below :



If a user has access to both sites, upon login the user will see a page which allows selection of the appropriate site. User will select the appropriate site.

A message will display indicating which site user is logged in to:

You are logged into  
**WorkSourceWA PRODUCTION**

## Password Reset

If the permanent password is forgotten, click “Forgot your password?”

ETO™ software

Username:  
email@something.com

Password:  
[ ]

**Log In**

[Forgot your password?](#)

Guest/Entity Login

An email will be generated to the user that includes a link and instructions to reset the password to the user account.

Click the link in the system-generated email. Enter and confirm a new password, and click “Continue.”

**Forgot Password**

New Password: [ ]

Confirm Password: [ ]

**Back** **Continue**

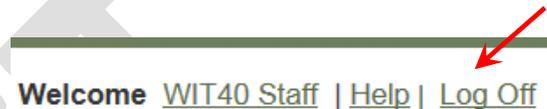
All future logins will require the new password.

## Log Off

Customer Management software is a secure website, similar to online banking.

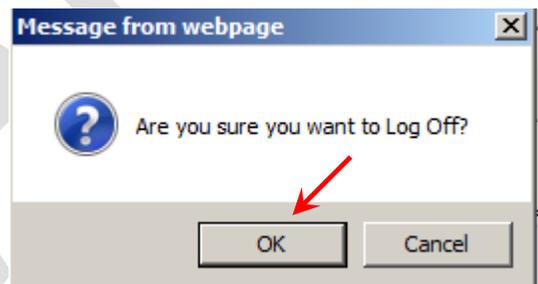
To keep data secure, users must always log off of Customer Management when away from the application or device. This practice also secures the integrity of the user's account.

To log off, click “Log Off” in the top-right corner of the Customer Management page.



Welcome [WIT40 Staff](#) | [Help](#) | [Log Off](#)

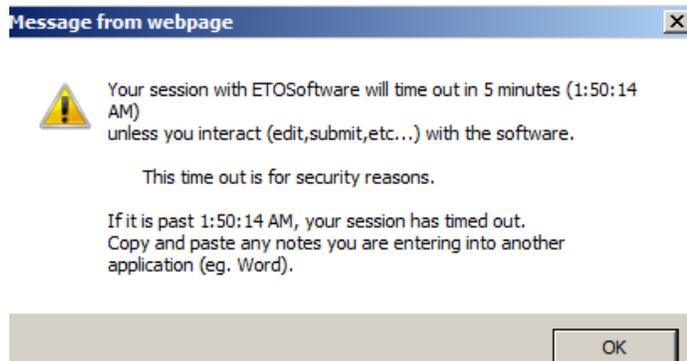
Click “OK” to confirm and complete the log off process.



## Security Timeout

To ensure data security, Customer Management will timeout after a user is inactive in the system for set amount of time. Currently set to 60 minutes, this setting can be changed by an administrator.

Five minutes prior to timeout a warning message is generated. Click “OK” to continue in Customer Management.



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 user 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). Log back in to the system, initiate a new form, and paste the information into the new form.

## Manage User Account Settings

User accounts are self-managed. This feature includes setting security questions, passwords, updating account information (e.g., time zone, account name, email) and setting options for the Navigation Bar and To Do List.

Accounts are self-managed through the My Account page. To access the My Account page, click the user's name link located at the **top-right** corner of the software.



Welcome [WIT40 Staff](#) | [Help](#) | [Log Off](#)

The **My Account** page contains four links. Numbers correspond with instructions below:



### 1. Manage Personal Settings

- Auto Collapse Navigation Bar – sets the Navigation Bar default to be either collapsed or expanded upon login.
- To Do List Defaults – set to either remember last sort option, or always use a defined sort option
- Date of Next Contact Reminder – set to always provide reminder if the Date of Next Contact on touchpoint is not filled in, or never provide a reminder.
- Retain previous value used to search for job seeker – set to either remember the last value searched or to not remember last value searched.

## 2. Manage My Account

Select “Manage My Account” to change name, ZIP code, email address, and time zone.

The screenshot shows a form titled "Manage My Account" with a sub-header "Account Settings". It contains the following fields:

- First Name:** WIT
- Last Name:** Prod
- Zip Code:** 98502
- Email Address:** witprod@sbg.com
- Time Zone:** (UTC-08:00) Pacific Time (US & Canada) [dropdown arrow]

Click “Save.”

## 3. 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.

The screenshot shows a form with two main sections:

- Passwords:**
  - \* Current Password: [text input]
  - New Password: [text input]
  - Confirm Password: [text input]
- Challenge Questions:**
  - \* [dropdown menu: "What was your childhood nickname?"] [text input]
  - \* [dropdown menu: "What was your childhood nickname?"] [text input]
  - \* [dropdown menu: "What was your childhood nickname?"] [text input]

At the bottom, there is a checkbox:  Make the current site my default site when I log in.

A note indicates: (\* = Required)

At the bottom right, there are two buttons: "Back" and "Save".

**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.”

#### 4. Live Office Account Info

Live office provides the ability to run reports while in Excel, without the need to be logged in to Customer Management.

Select “Live Office Account Info” to access the live office credentials. Copy this information to setup a live office account.

Click [here](#) for the QuickStart guide.

This is the information you will need to use Live Office:

User Name:	etomonster3_5174e85c-efe5-4308-9562-1e67243d5477	Copy to Clipboard
Password:	24d25e9c-ef3e-434e-a794-cd3cf0e637a8	Copy to Clipboard
Web Services URL:	https://liveoffice.etosoftware.com/dswsbobje/services/session	Copy to Clipboard
Server:	@BOProdCluster2	Copy to Clipboard

Additional information on live office, including installation instructions, can be found in the online Social Solutions Help Manual:

[sites.google.com/site/etosoftwarehelpmanual/additional-add-on-products/live-office](https://sites.google.com/site/etosoftwarehelpmanual/additional-add-on-products/live-office)

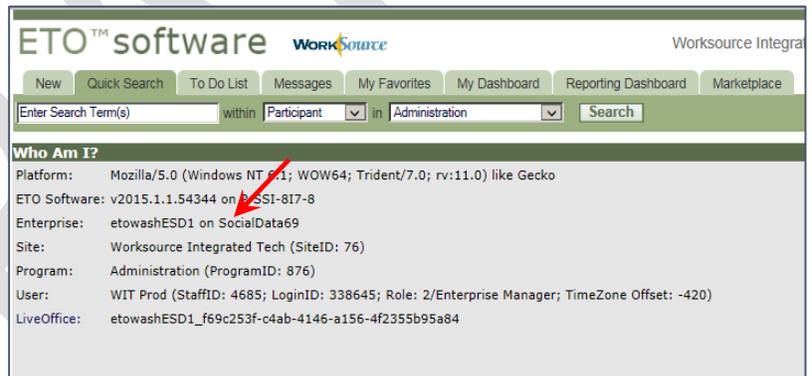
## Support

T3 Trainers should act as the primary resource for answering users' questions, with administrators as a secondary source.

If requesting support and asked for details on the site, double-click on the WorkSource logo in the **top-left** corner of Customer Management.



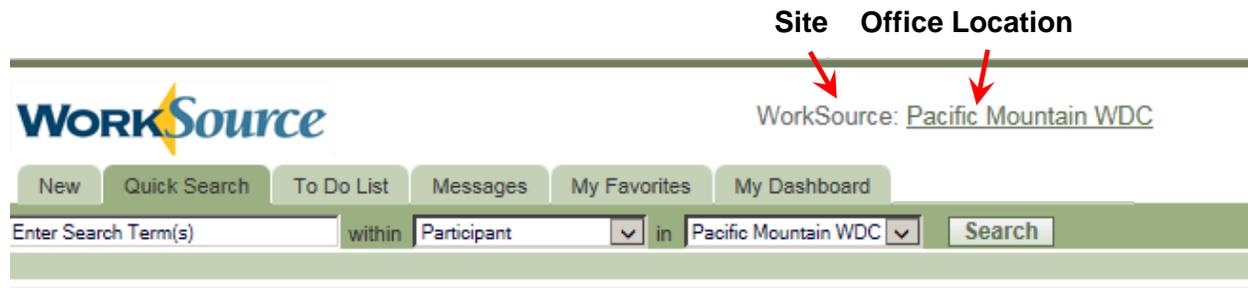
This will open the **Who Am I?** screen. Copy and paste the entire section into a support ticket or an email response.



## Lesson 2: Navigating the System

### Site and Program

For the WorkSource solution, the site name is WorkSource and is found at the top center-left of screen. The top center-right indicates an office location.

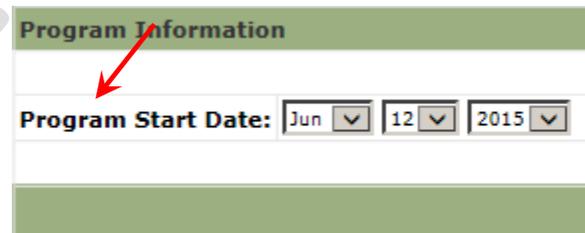


The office location shown at the top center-right is the **active** office location. **All work will be recorded to the active office location.** A clickable link means the user account has access to more than one office location. To change to a different office location, click the office location link and select the desired office location from the drop-down list.

**CRITICAL NOTE:** Customer Management is powered by ETO Software™. ETO Software™ refers to the office location as a “program.” This is **not** a business program within WorkSource.

Example: “Program Start Date.” This is **not** the start date a job seeker enters a business program within Customer Management. It is the date a job seeker becomes **active** in a particular **office location**.

### Office Location



In many places, the term “program” has been changed in the software to office location. Enhancements to the software continue to take place to change the term “program” to office location. This manual will be updated as changes occur.

To determine the difference:

Where the term “program” is hard-coded and still part of the software, it refers to office location. Anywhere a recognizable program (WIOA, Wagner-Peyser) is shown, that is truly a program.

## Navigation Methods

Three common methods for navigation include the Quick Tabs, dashboard navigation and the Navigation Bar. Frequently used features will be available in Quick Tabs or dashboard navigation. All features available to the user will be displayed in the Navigation Bar.

### Quick Tabs

Quick Tabs are displayed across the top of the software.



The numbered items below provide a description of features that can be accessed from each tab:

1. **New:** This page can be configured by administrators to display links for commonly used *new* actions.
2. **Quick Search:** Allows users to search for a job seeker, employer, service provider, report, staff, or event in a specific office location (program) or search site-wide. The Fly-out menu is accessed through this tab when searching in an office location. **This feature is the most common method of searching within the software.**
3. **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.
4. **Messages:** Facilitates messaging between system users.
5. **My Favorites:** Allows users to create a page of links or shortcuts for commonly used system features or reports.
6. **My Dashboard:** Provides access to the user's dashboard. My Dashboard displays a snapshot of recent data entered by the user. This may include aggregate data or data for many different job seekers.
7. **Reporting dashboard:** Redirects user to the reporting dashboard (viewable based on permissions granted)

## Quick Search

**Site Search** – returns **active** and **dismissed** records. Job seeker demographics and employer attributes cannot be edited.

**Office Location (program) search** – returns **active** records. This “active” refers to active within the office location, not a business program. Records are editable. Note: Although records are editable when searching in an office location (program), to maintain data integrity, job seeker and employer records must be edited in Job Match, not in Customer Management.

### To conduct a quick search:



1. Enter search terms in the **first** field. To narrow search terms:
  - Job seekers:** enter full or partial name, full or partial SSN (without dashes), or the seeker ID.
  - Employers:** enter partial or full employer name, type, or sub-type. To search Reports, enter partial or full Crystal Report© name or custom search term.
2. The **second** drop-down field defaults to Participant.
  - Select “Participant” to search for **job seekers**.
  - Select “Entities” to search for **employers** or service providers.
3. The **third** drop-down menu defaults to the office location (program) currently active. Select either the **office location** (program) or the **Site** to conduct a search.
  - For **site** searches, the search terms cannot be left blank. Enter partial or full *last* name. Active and dismissed records will be displayed.
  - For **office location (program)** search, the search terms can be left blank yielding all records currently active in the office location (program), or search terms can be entered to narrow the results. Only active records will be displayed.

Click “Search.”

Note - If the desired office location (program) is not active, change the office location (program) by clicking the office location link at the top of the page, then select the desired office location (program) from the drop-down list.

The results of the quick search will be displayed.

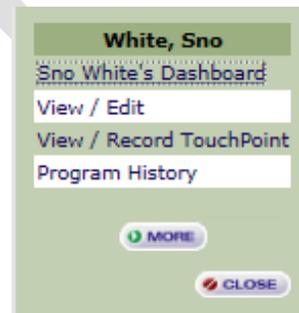
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**Office Location Search:** When an office location (program) search is conducted, and a seeker or employer record is accessed, it means the user has access to the office location and the seeker or employer is active in the office location. To access a specific record, click the green arrow to the left of the record.

Quick Search Results			
Name	SSN	Monster Seek	
Matches for: <a href="#">Show All Participants</a>			
1.	Jones Spok	xxx-xx-xxxx	xxxxxxx
2.	Smith Sea	xxx-xx-xxxx	xxxxxxx
3.	White Sno	xxx-xx-xxxx	xxxxxxx

### Fly-Out

The **Fly-Out** menu will display. The Fly-Out menu is found only after conducting a quick search on job seekers or employers. The short menu is applicable to the record selected.



Select the first item, “*Subject’s Dashboard*” to go to the job seeker or employer dashboard.

Select “View / Edit” to go directly to the job seeker’s demographic page or employer’s account page. Fields will be editable, however to maintain data integrity, job seeker and employer records must be edited in Job Match, not in Customer Management.

Select “View / Record TouchPoint” to view **all** touchpoints recorded for the job seeker or employer.

**Site Search:** To search across the site, enter partial name in the search criteria, and select WorkSource in the third field. Click “Search”. From the returned list of names displayed, click “Go” to the left of the record to access a specific record.

Matches for: <b>LName</b>					
1.		<a href="#">Seeker Sally</a>	xxx-xx-xxxx	xxxxxxx	Currently Enrolled
2.		<a href="#">Seeker Colton</a>	xxx-xx-xxxx	xxxxxxx	Currently Enrolled
3.		<a href="#">Seeker Jan</a>	xxx-xx-xxxx	xxxxxxx	Currently Enrolled
4.		<a href="#">Seeker Jim</a>	xxx-xx-xxxx	xxxxxxx	Currently Dismissed

A site search is useful to locate a dismissed record. Action can be taken to re-add subject to office location if needed.

In cases where a seeker or employer is not active in the office location where the user has access, user can conduct a site search to access the subject’s dashboard and determine where seeker or employer is active.

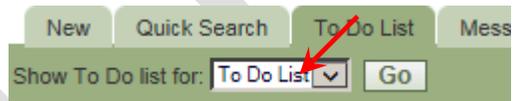
## To Do List

The To Do List feature provides a means 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. Full instructions for adding an item to the To Do List are detailed in the touchpoint section. Defaults for the To Do List sort options are set on the Manage Personal Settings page.

To access the To Do List, locate the Quick Tabs across the top of Customer Management, and select “To Do List.”



Choose “To Do List” from the “Show To Do list for” drop-down menu, and click “Go.”

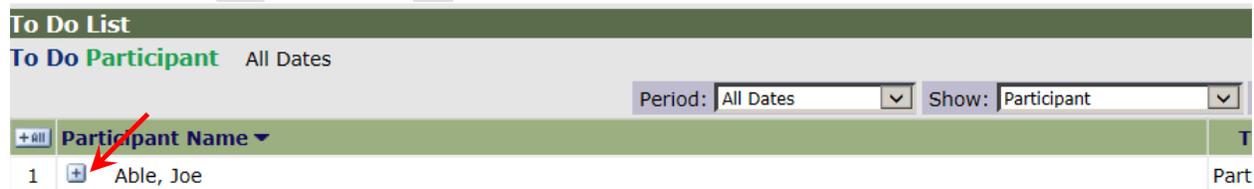


Items displayed on the To Do List can be filtered:



1. **Period:** The desired date range.
2. **Show:** Select how the To Do items should be organized: by participant name (job seeker), entity (employer), calendar, etc.
3. **Scope:** office location (program) or site.
4. **Staff:** If configured, program managers and site administrators can view the To Do lists of users with lower roles
5. **Print:** Prints the To Do list.

Click the plus icon next to an item to expand information displayed.



Past due items on the To Do List will display in red font.

Complete the action (**update or record touchpoint**) and click “Save.” Item will no longer show in the To Do list.

## Messages

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

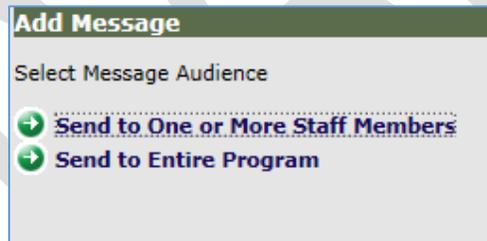
### Create Customer Management Messages

Locate the Quick Tabs across the top of Customer Management, and select “Messages.”

Click “Create Message.”



Select one of two options:



**Send to One or More Staff Members within Site:** Select users (CTRL or SHIFT will allow multiple selections). Enter message date, type message and click “Send Message.”

**Send to Entire Program:** Sends message to all staff members within the active office location (program). Enter message date, type message and click “Send Message.”

Messages sent with a future date will not appear in the recipient’s inbox until the designated date.

## Read Customer Management Messages

The Messages tab turns orange when a message is received.

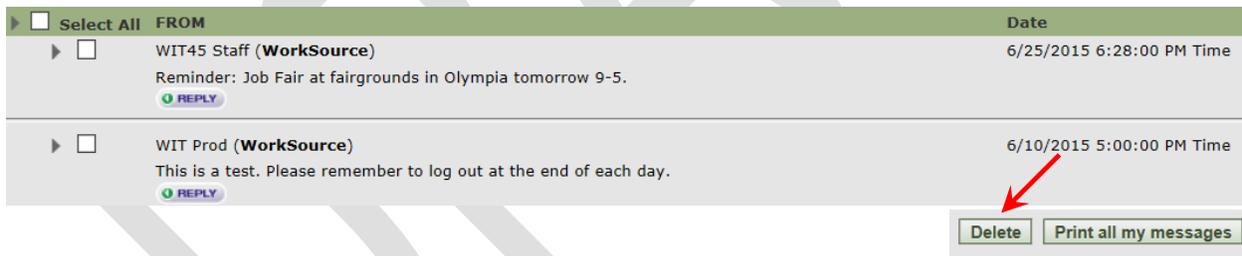


To read message(s) in Customer Management, click “Read Message.”



Messages will display on the page without the need to “open” the message. Once read, the orange tab will revert to green.

Messages remain in the Customer Management 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 all messages.

## My Dashboard

The My Dashboard tab is the *user's* dashboard (aka a staff dashboard). My Dashboard displays recent activity performed by the user. My Dashboard is not geared toward a specific job seeker or employer, rather it is aimed toward a user's collective work in the software.

When logging in to Customer Management, or navigating to a different office location (program), navigation is set to default to "My Dashboard."

To access My Dashboard: Locate the Quick Tabs across the top of Customer Management, and select "My Dashboard."

The screenshot shows the WorkSource interface with the 'My Dashboard' tab selected. The top navigation bar includes 'Quick Search', 'To Do List', 'Messages', 'My Favorites', and 'My Dashboard'. Below the navigation bar is a search bar with the text 'Enter Search Term(s) within Participant in Pacific Mountain WDC'. The main dashboard area is divided into several sections:

- Participants:** Includes links for Home, Record Non-Federal Service, and Communicate via ETO Engage.
- Search:** Includes links for Search By Job ID, Search By Service Code, Veterans List, and MSFW List.
- Dashboard Search:** A search box with the text 'Dashboard Search'.
- Recent TouchPoints:** A table showing recent activity. The table has columns for Take Action, TouchPoint, Dashboard Collection, Program, Name, Subject Type, Status, and Date Completed. One entry is visible: 'Case Note' for 'Anderson, Chad' in the 'Pacific Mountain WDC' program, with a status of 'Participant' and a date of '11/29/2015'.
- Recent Participants/Entities:** A section for 'Recent Participants'.

Links are displayed throughout My Dashboard to access features, lookup, search and record data. Rectangular sections called ETO Parts contain system data at a glance. My Dashboard includes recent touchpoints recorded by the user, 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 Customer Management, providing a quick-glance view of the environment. In addition to My Dashboard, all subject types have dashboards including job seekers, employers, events, touchpoints, and staff.

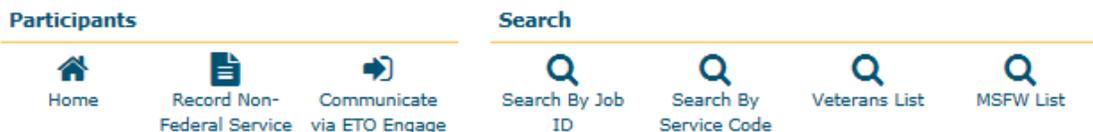
Using and editing dashboards will be discussed in the dashboard section.

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).
- ETO Insights and other reports can be added to dashboards to illustrate change and progress.
- Dashboards provide an added level of navigation via shortcuts.

## Dashboard Shortcuts

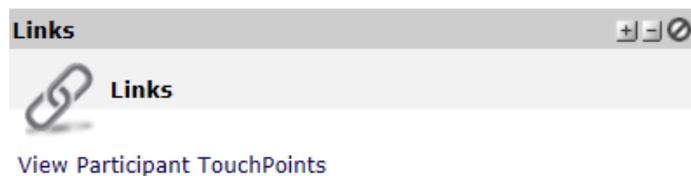
Shortcut buttons are located at the top of the user dashboard, the job seeker dashboard and the employer dashboard. Click one of the Shortcut buttons to navigate accordingly. Impersonating a job seeker or recruiter (discussed in Lesson 8) is achieved through a dashboard shortcut.



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

## Action Links

Links provide quick navigation to frequently used features. Unless disabled by administrators, users can add and remove links to this section.



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## Job Seeker Dashboard

The job seeker (participant) dashboard displays data and services about a single job seeker including General Information, Demographic Details, Serving Office, and recent touchpoints (for example, a section labeled Program Management Forms).

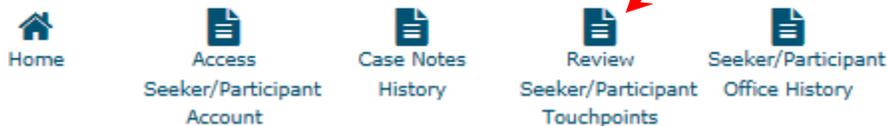
Note: items displayed on the job seeker dashboard may be customized for different office locations (program).

**To access the job seeker dashboard:** use Quick Search to search for the job seeker. Click the green arrow next to the job seeker's name. The Fly-Out menu will display. Select the job seeker's dashboard link.

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 job seeker dashboard also includes shortcuts to features that can be actioned on for the job seeker, including impersonating the job seeker in Job Match, discussed in Lesson 8. Note the Review Seeker/Participant TouchPoints shortcut.

### Seekers/Participants

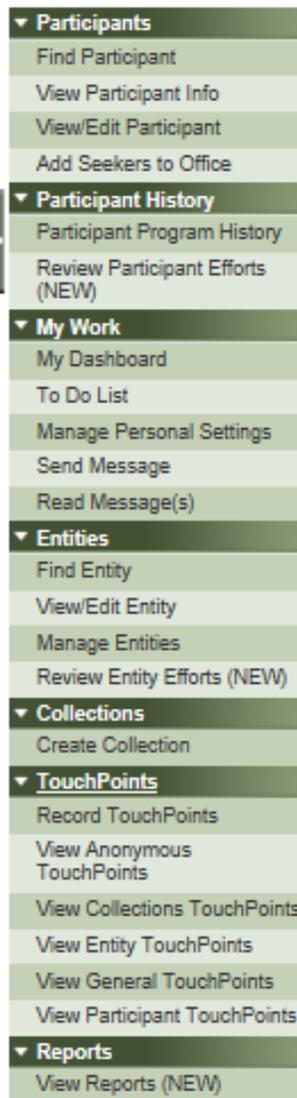


## Navigation Bar

The Navigation Bar is the green menu located on the right-side of the page. Default settings for this feature can be set from the Manage Personal Settings page. Administrators manage which features display on the Navigation Bar.

While the quick search provides links to frequently used features, the Navigation Bar includes **all** features available to a user role.

To expand or collapse the Navigation Bar, click the vertical green arrow found to the immediate left of the Navigation Bar.



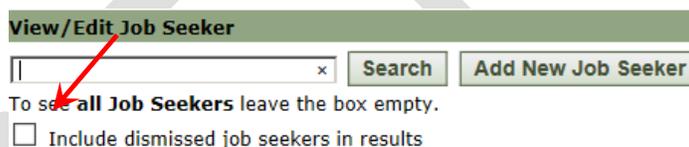
Click the dark green menu bar to open each section and view available features. Only features granted to the user role will be listed.

## View/Edit Participant



The View/Edit Participant search is a search for a job seeker within an office location (program). To conduct the View/Edit Participant search, click “View/Edit Participant” located in the Participants section of the Navigation Bar.

This feature is similar to searching for a job seeker via the quick search, however there is also an option to check the box “Include Dismissed Participants in results.” This will pull dismissed participants into the search results. Leave the check box unchecked to search on active job seekers (active in the office location). Regardless if the check box is checked or not the search criteria will only pull job seekers who **are or once** were active in the office location (program) currently active.



Type the job seeker’s full or partial name, full or partial SSN (without dashes), or the Job Match ID in the search box.

Click “Search.” The results of the search will be displayed.

Select the name of the job seeker. The View/Edit demographic page will be displayed.

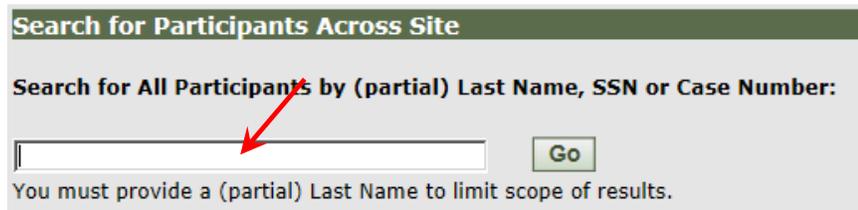
Note: Although records are editable when searching in an office location (program), to maintain data integrity, job seeker and employer records must be edited in Job Match, not in Customer Management.

Top center of page: Click “View *job seeker’s* dashboard” to be redirected to the job seeker’s dashboard.

## Find Participant

The Find Participant feature is a search for a job seeker **site** wide, and is similar to searching across the site via the quick search. To conduct a site wide search for job seekers, click “Find Participant” located in the Participants section of the Navigation Bar.

The search terms cannot be left blank.



**Search for Participants Across Site**

Search for All Participants by (partial) Last Name, SSN or Case Number:

You must provide a (partial) Last Name to limit scope of results.

Enter search terms and click “Go.” Both active and inactive job seekers will be displayed. Select the name of the job seeker. The demographic data will be displayed, however, data will be greyed out.

Top center of page: Click “View *job seeker’s* dashboard” to be redirected to the job seeker’s dashboard

## Hands-On Activity – System Navigation

### My Dashboard:

Go to your dashboard (My Dashboard on Quick Tabs). Explore all of the sections shown. Note this represents **your** work in the system.

Explore all of the shortcuts at the top of My Dashboard.

Explore all of the sections within the dashboard.

### Seeker Dashboard

- Search within an office location for a job seeker using Quick Search and access seeker's dashboard. Go to the job seeker's dashboard and explore the information available.
  - Explore all of the shortcuts at the top of seeker's dashboard.
  - Explore all of the sections within the dashboard.
  - Note the seeker's dashboard represents work done for the seeker, regardless of which staff completed the work.
  
- Search within the site for a job seeker using Quick Search.
  - Locate a dismissed seeker.
  - 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.

### 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 Job Seekers

A job seeker record is created in Customer Management once the job seeker completes a registration in Job Match. Basic demographic details are integrated from Job Match to Customer Management and can be viewed on the job seeker's dashboard, either in the Participant Information section or by viewing the Demographic Details touchpoint in the General Information section.

TouchPoints are response forms that are accessible through various dashboards in the system. All data in the system can be reported out using ETO Results (SAP Business Objects).

To ensure data integrity, basic demographic information about the job seeker **must** always flow from Job Match to Customer Management. Making edits to demographic information in Customer Management is discouraged. Instead, staff will impersonate the job seeker to make edits in Job Match, which will flow instantly to Customer Management. (Refer to lesson 8 for instructions on impersonation.)

### Job Seeker Search

Customer Management offers several different ways to search for job seeker records as detailed in Lesson Two: Navigating the System.

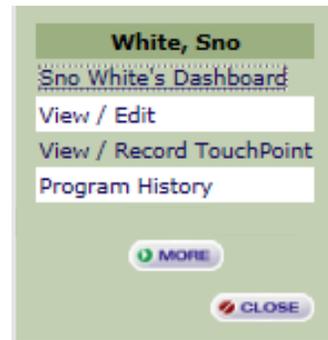
Quick Search – Select office location - searches within office location

Quick Search – Select WorkSource - searches entire site

Using quick search within office location will display the fly-out.  
Select subject's dashboard to view 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.



Navigation Bar - View/Edit Participants – within office location (program)

Navigation Bar - Find Participants – within Site

## Serving Offices

The job seeker dashboard contains an ETO Part titled “Serving Offices” that provides a quick view of offices where the job seeker is currently active.

Click “Review All” to be directed to the Program History page. In this context, “program” is referring to an office location.

Program Name	Start Date	End Date	Reason for Dismissal
Administration	6/2/2015	Pending	
Spokane	6/1/2015	Pending	

[Review All \(2\)](#)

The Program History page displays information for current and past office location activation. This page can also be accessed by searching for a job seeker via quick search, selecting the job seeker’s name, and from the Fly-Out menu, select “Program History” (office location).

1 Enrollment	2 Program Start Date	3 Program End Date	4 Projected End Date	5 Days in Program	6 Reason for Dismissal	7 Staff	8 Take Action
2 Past Enrollment:	3 6/20/2015	4 6/2015	5	6 13	7 Soft Exit	8 San Larsen	9
<b>Bellevue Workfirst (Disabled)</b>							
1 Enrollment	2 Program Start Date	3 Program End Date	4 Projected End Date	5 Days in Program	6 Reason for Dismissal	7 Staff	8 Take Action
Currently Enrolled:	5/19/2015			41		WIT Prod	

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), where the term enroll or enrollment means when seeker is added to an office location.
3. **Program Start Date:** Date the job seeker was added into the office location.
4. **Program End Date:** Date the job seeker 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 job seeker is/was active in the office location.
7. **Reason for Dismissal:** Reason for dismissal (populates for past enrollments).
8. **Staff:** Name of the user account that added the job seeker into the office location.
9. **Take Action:** Print past enrollment records, edit a record or delete a record.

Select “View Participant Information” (top right) to navigate to the job seeker demographic page.



Select “Program History Audit Trail” (top right) to access an audit report for program history (refers to office location)

## Add a Job Seeker into an Office Location

**Automatic adding seeker to office location:** When a job seeker completes the registration process in Job Match, the job seekers will instantly be integrated into Customer Management and will be automatically added (made active) in the correct office location(s) based on seeker's ZIP code

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

To manually add a seeker into an office location, first ensure user is active in the desired office location at the top of the screen. Select "Add Seekers to Office" located in the Participants section of the Navigation Bar.

The search page will display.

Enter the job seeker's search criteria. Click "Search."

**Enroll Job Seekers into Clover Park Community College**

Last Name:

First Name:

SSN:

Case Number:

Family Name:

Based on the specified search criteria, the results page will display all records for job seekers that are **not** active in the current office location. Select the box next to the job seeker to be made active in the office location, then scroll to the bottom of the page.

Below are all Job Seekers matching 't' who are not currently enrolled in Clover Park Community College.

<input type="checkbox"/>	Job Seeker	Age	Case Number	DOB	SSN
<input checked="" type="checkbox"/>	Allison Test Test	44	12830	06/16/1971	003789087
<input type="checkbox"/>	Test Test	28	12852	06/23/1987	111111111
<input type="checkbox"/>	Prime Testcase	30	12862	01/01/1985	545123456
<input type="checkbox"/>	Prime TestCase	30	12866	01/01/1985	545543210
<input type="checkbox"/>	SameName Testcase	30	12863	02/02/1985	545098765
<input type="checkbox"/>	QAX2 Tester205	40	12752	05/01/1975	444332222
<input type="checkbox"/>	Allison Thompson	24	12787	08/30/1990	009900990
<input type="checkbox"/>	Paul Tweeter	25	12802	01/01/1990	444331212

\* Program Start Date:

Enter a Program Start Date (refers to date seeker is added to the office location), then click "Enroll Job Seeker" to complete the process.

## **Add multiple job seekers to an office location at one time**

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

To add multiple job seekers, 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 job seekers not currently active in the program will display. Check the box next to each job seeker's name to be added. Scroll to the bottom of the page.

Choose either:

Enroll selected job seekers with different program start dates

– or –

Enroll selected job seekers with same program start date.

Click "Continue."

Enter a Program Start Date (refers to date seeker is added to the office location), then click "Enroll job seeker" to complete the process.

## Audit Report

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

Access the View/Edit page for the Job Seeker: From the dashboard, click on the View/Edit Participant link or if searching for the seeker via quick search, select View / Edit

**Participant Information**

**Moses Adams**

**Case Number:** 14499  
**DOB:** 5/8/2000  
**Age:** 15 years  
**Contact:** mosesadams@esd1.com  
9162765767 (Cell)

[View/Edit Participant](#)

**Name**

Matches for: **FName**

1. Adams Moses

**Adams, Moses**

Moses Adams's Dashboard

View / Edit

View / Record TouchPoint

Program History

[MORE](#)

[CLOSE](#)

## Select Audit Report

**Edit Job Seeker**

[Audit Report](#) [Program History](#) [View Moses Adams's Dashboard](#)

Status: **Currently Enrolled**

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

First Name

Middle Name

Last Name

The user will be able to see a list of changes that have been made to a seeker's demographic information

Administration				Monster, WIT	9/30/2015
Demographic	Old Value	New Value	Audit Date		
HasRows		False	9/30/2015 2:06:10 PM		
CaseNumber		14499	9/30/2015 2:06:10 PM		
CellPhone		916276571	9/30/2015 2:06:10 PM		
DOB		5/8/2000	9/30/2015 2:06:10 PM		
FName		Moses	9/30/2015 2:06:10 PM		
LName		Adams	9/30/2015 2:06:10 PM		
SSN		560918181	9/30/2015 2:06:10 PM		
ClientGUID		00000000-0000-0000-0000-000000000000	9/30/2015 2:06:10 PM		
EmailAddress		mosesadams@esd1.com	9/30/2015 2:06:10 PM		
SiteId		0	9/30/2015 2:06:10 PM		
User name		moses	9/30/2015 2:06:10 PM		
Answer to Security Question		Moses Lake	9/30/2015 2:06:10 PM		
Monster Seeker ID		242610974	9/30/2015 2:06:10 PM		
Type of Security Question		Where were you born?	9/30/2015 2:06:10 PM		

Administration				Monster, WIT	10/23/2015
Demographic	Old Value	New Value	Audit Date		
HasRows		False	10/23/2015 5:42:00 PM		
CaseNumber		14499	10/23/2015 5:42:00 PM		
CellPhone		916276571	10/23/2015 5:42:00 PM		
DOB		5/8/1995	10/23/2015 5:42:00 PM		
FName		Moses	10/23/2015 5:42:00 PM		
LName		Adams	10/23/2015 5:42:01 PM		
SSN		560918181	10/23/2015 5:42:01 PM		
ClientGUID		00000000-0000-0000-0000-000000000000	10/23/2015 5:42:01 PM		

DRAFT

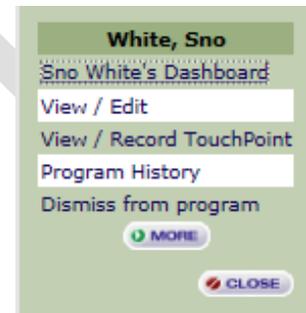
## Opt In / Opt Out

Seekers are by default “opted in” which means both restricted and non-restricted users will see their information.

On the Add Participant or Edit Participant page, the opt-out feature will show, but only for users who are **not restricted users**.

- Restricted users cannot make changes to a participants 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**

Using Quick Search, search for the participant that you would like to opt-out, and from the fly-out menu, select View / Edit.



There will be an option at the top of the page for Opt-Out. Check this box to opt the participant out of sharing their information with partner users.

Click **Save** at the bottom of the screen.

This seeker’s data will now be hidden from restricted users.

**Dismiss Job Seeker** from Office Location (program)

The Dismiss Job Seeker feature is not utilized in Customer Management. If a seeker exits the system, it will be reflected in Job Match, and the information will flow to Customer Management.

DRAFT

## Hands-On Activity: Search and View Job Seeker Records

Use any seeker, or use one of the accounts provided in training.

### Search for a Job Seeker:

- Access a job seeker's dashboard. In the General Information section, view the Demographic Details touchpoint. Open the Demographic Details dashboard and view information.
- View the Serving offices record of your job seeker. Click on the Review All link at bottom of section. Note any dismissed or inactive office locations.
- Using quick search, access the View/Edit page for seeker. Note the demographic details displayed. Note it is possible to make edits when searching on an office location, however user **MUST NOT** make edits in customer management. To maintain data integrity, user will instead impersonate the seeker (lesson 8) to make edits.
- Using quick search, access Review TouchPoint page (Quick Search, View/Record TouchPoint). Note all touchpoints taken are listed. Note under staff column whether touchpoint was generated by Job Match or by a staff member.
- Access same page by going to seeker dashboard, then clicking on the shortcut: Review Participant TouchPoints
- Search within the site for a job seeker using Quick Search
  - Locate a dismissed seeker.
  - Locate a seeker who is not active in the office location(s) you have access to.
- Add a job seeker into Pacific Mountain WDC. Add 3 seekers at once into Pacific Mountain WDC.

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

## Lesson 4: Working with Employers

Basic employer account details are integrated from Job Match to Customer Management 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 Job Match to Customer Management. Making edits to attribute information in Customer Management must not occur. Instead, staff will impersonate the employer to make edits in Job Match, which will flow instantly to Customer Management. (Refer to lesson 8 for instructions on impersonation. Refer to the Job Match manual for instructions on working within Job Match).

### Employer Structure

- Stand-alone companies (each with a unique FEIN) will be labeled as a Sub-Entity record in Customer Management.
- Each corporate or headquarters employer representing a unique FEIN will be labeled as a "Company Entity" record
  - Each Company Entity employer can have one or more "Sub-Entity" records, which represent **distinct employer accounts** in Job Match.
- Each employer account in Job Match can have one or more recruiters.
- Customer Management and Job Match will both have the same set of Sub-Entity (employer) and recruiter records.
- The Company Entity, which only exists in the Customer Management system, will group multiple sub-entity records together.

		EMPLOYER	Job Match	Customer Management
<b>Example of: Stand-alone company - no branches or subsidiaries</b>				
Unique FEIN		Brick and Mortor - the employer - the hiring company	Company (Company Settings)	Sub-Entity
		HR Manager	(Account Settings) User / a person / enters information, job postings on behalf of company	Recruiter
<b>Examples of a corporation or holding company - a company that has branches or subsidiaries</b>				
Unique FEIN	Starbucks	Holding or Corpotate office		Company Entity
same FEIN - a branch or subsidiary	Starbucks on 1st ave	Brick and Mortor - the employer - the hiring company	Company (Company Settings)	Sub-Entity
		HR Manager	(Account Settings) User / a person / enters information, job postings on behalf of company	Recruiter
same FEIN - a branch or subsidiary	Starbucks on J St	Brick and Mortor - the employer - the hiring company	Company (Company Settings)	Sub-Entity
		HR Manager	(Account Settings) User / a person / enters information, job postings on behalf of company	Recruiter
		HR Mgr Assitant	(Account Settings) User / a person / enters information, job postings on behalf of company	Recruiter
		Hiring Manager	(Account Settings) User / a person / enters information, job postings on behalf of company	Recruiter

## Quick Search for Employer / Recruiter

Enter the employer or recruiter name in the search field. Change the second drop-down to “Entities.” The third drop-down defaults to the office location currently active.

Click “Search.”

The results will display both employer accounts and recruiter accounts. Recruiters are identified under the “Entity SubType” column as “Recruiter.”

(Note: the number to the right of the employer or recruiter name is a unique ID associated with the employer that is not associated to the FEIN number. It is possible to search for an employer using this ID.)

Quick Search Results

Entity Name	Address1	EntitySubType	Show Entity Type	Show Contact Info
<b>Matches for: All Entities</b>				
A&Associates (xw242610369vwx)	309 E. 5th		Show Entity Type	
achu achu (242609939)	4 main st	Recruiter	Show Entity Type	Show Contact Info
achu awah (242609900)	10 pleasant st	Recruiter	Show Entity Type	Show Contact Info
Acme Troubleshooting	3652 North Cedar Street		Show Entity Type	

Click the green arrow next to the employer or recruiter to display the Fly-Out menu.

Select “Employer/recruiter’s dashboard” to be directed to the dashboard. The dashboard will display recent activity on the employer or recruiter account.

Select “View / Edit” to be directed to the account page. Although edits can be made via the account page, to maintain data integrity, all changes to employer/recruiter’s account must flow from Job Match to Customer Management. To assist in making edits, use the Impersonate an Employer feature detailed in Lesson 8. While in the employer’s account page, not offices “active” for employer can be viewed by checking “Program Information.”

Select “View / Record TouchPoint” to see a comprehensive list of all touchpoints recorded for the employer or recruiter.

Review TouchPoints

Review TouchPoints for TestCompany (xw242609913wx)

Name
<input type="text"/>
Employer Service <b>Take New</b>
Job Posting

December 2015

## Employer or Recruiter Dashboard

The employer or recruiter dashboard displays recent information recorded for the selected employer/recruiter, including attribute information and recent activity/services.

Action for the employer/recruiter can be taken via links throughout the dashboard.

To impersonate the recruiter in Job Match, select the shortcut “Access Recruiter Account.”

Note: This shortcut will function only from the recruiter account, not the employer account. (See lesson 8 for instructions on impersonation.)

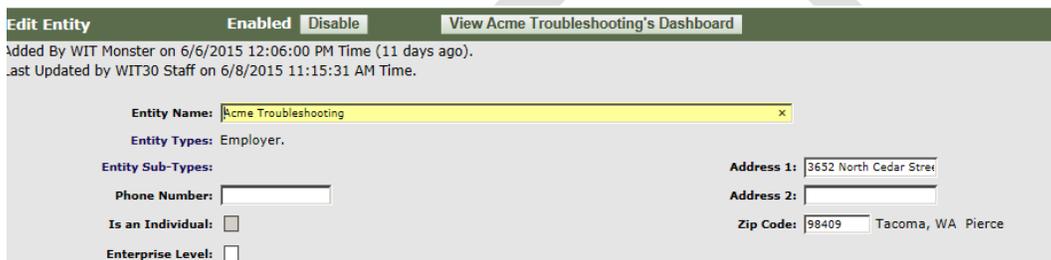
The screenshot shows the dashboard for 'ABC Bookkeeping and Accounting (xw242616130wx)'. At the top right is an 'Edit Dashboard' button. The main navigation area is titled 'Employers/Recruiters/Entities' and contains four icons: Home, Access Recruiter Account (highlighted with a red arrow), Record Business Service, and Employer/Recruiter Notes History. Below this are four panels: 'Entity Information' showing details for 'ABC Bookkeeping and Accounting (xw242616130wx)' (Type: Employer, Sub-Type: Sub-Entity, Contact: 11113 SE Tola Road, Aberdeen, WA 98520); 'Employer Services' with a '+ New' button; 'Action Links' with links for 'View/Edit Entity', 'Entity Program Information', 'Consent Form', and 'View Entity TouchPoints'; and 'Worksites'.

## Employer or Recruiter Account Page

The employer/recruiter account page can be accessed via a quick search or the navigation bar (see instructions in previous section.)

Conduct a quick search, and select employer/recruiter. Click View/Edit to be directed to the employer's account page.

Details about the employer/recruiter, called attributes, are listed. Scroll through the page to find specific information. Do not make edits in Customer Management. Although data is editable, all changes to employer or recruiter's profile must flow from Job Match to Customer Management.. Impersonate the recruiter to make changes to the employer account in Job Match.



The screenshot shows the 'Edit Entity' page for 'Acme Troubleshooting'. The page has a green header with 'Edit Entity', 'Enabled', 'Disable', and 'View Acme Troubleshooting's Dashboard' buttons. Below the header, it shows the entity name in a dropdown menu, entity types, and various attributes like phone number, address, and zip code. The 'Is an Individual' and 'Enterprise Level' checkboxes are unchecked.

**Please note: by Go-Live, the intent is for all employers to be active in all office locations.**

### 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 Customer Management. Once disabled in WebAdmin, users can verify the employer is effectively disabled by searching in customer management and noting the employer is not assigned to any office locations.

Employers/recruiter should never be directly disabled from Customer Management.

## Hands-On Activity – Working with Employers

### Search for an Employer

Use any employer account or use one provided during training.

- 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.

### Making Edits to Employer or Recruiter

(You will need an employer login for this exercise. If you do not have an approved employer account in Job Match, use an account provided in training...then generate the following:)

Go to Job Match. Change the address of your employer and the phone number of the recruiter. Note the different options to choose to make edits to the employer or the recruiter.

Your Account – Account Settings – updates the recruiter record

Your Account – Company Settings – updates the employer record

Return to Customer Management.

- Search for your employer and note the edits now in Customer Management
- Search for the recruiter and note the edits now in Customer Management

## 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 Results (SAP Business Objects).

TouchPoints are configured specifically for job seekers 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 job seeker or employer	Data entered by staff
Data entered by the job seeker or employer in Job Match is integrated into Customer Management via touchpoints. The data should be considered view-only in the Customer Management 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 Customer Management. Accessing the list of available touchpoints is best done from the dashboard.

Recorded touchpoints can be **viewed** from many places within Customer Management. Accessing the recorded touchpoints is best done from the dashboard.

## Workflow

### Cross-references:

Customer Management 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 seeker's demographic record as seen on the view/edit participant screen, or relevant Customer Management 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 Customer Management, this may be used to document basic information about the seeker (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 Customer Management, response cross-references are used to lookup active contracts for plans and services.

### Conditional Rules / Calculations:

Many touchpoints in Customer Management 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, navigation to the Review TouchPoints page:

For seeker, click on the Review Seeker/Participant Touchpoints **shortcut** on the seeker dashboard.

For employer or recruiter, click on the View Entity Touchpoints **shortcut** on the employer or recruiter dashboard.

Or - for seeker or employer/recruiter, use quick search, select name, and using the Fly-Out menu, select "View/Record TouchPoint."

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"/>	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 user 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

## Record TouchPoint (Take New TouchPoint)

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

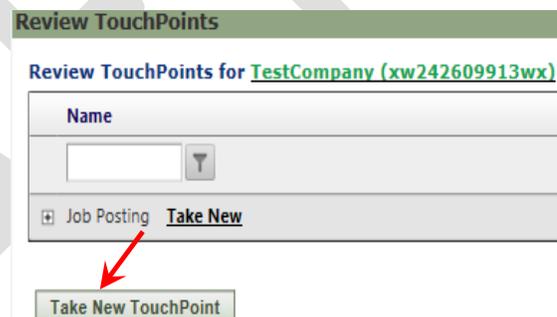
### Single Job Seeker or Employer TouchPoint

TouchPoint data can be entered from several locations. Within a dashboard, click on the plus sign found in a dashboard part. From the drop-down, select the name of the touchpoint that should be recorded and click “Continue.”

- or -

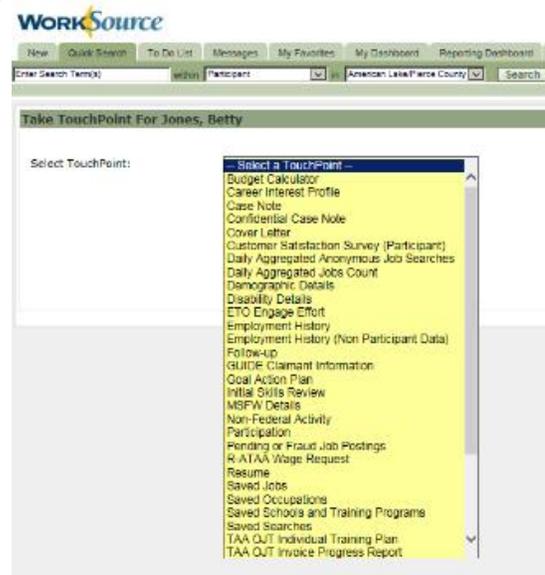
Perform a quick search for job seeker or employer. Click the desired name in the search results and select “View/Record TouchPoint.”

Select “Take New TouchPoint.”



From the drop-down, select the name of the touchpoint that should be recorded and click “Continue.”

Only those touchpoints configured for a single job seeker or employer will be displayed.



Ensure questions from all pages are answered. Pages are displayed via tabs across the top of the touchpoint. Date field on touchpoint is date contact is made. Date touchpoint is actually taken is time-stamped in the background

Complete each question. Required questions have a red asterisk to the right of the question name and must be completed for the touchpoint to be saved.

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.

The recorded touchpoint can be viewed on the job seeker’s or employer’s dashboard, or on “My Dashboard.”

**Schedule Date of Next Contact** Alert to show up in To Do list.

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

Select:

- Schedule Follow-up Alert to show up on user’s To Do list – or –
- Schedule Follow-up Alert to show up on Other Staff’s To Do List. When this option is chosen, choose the office location and user 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 user’s benefit and will not show up in the job seeker/employer’s record. The regular notes field in the touchpoint will show up in the job seeker/employer’s record.

Complete touchpoint with one of the Save options.

To Do item will now show up in the To Do list, and will remain there until action is completed.



## Primary / Secondary TouchPoint

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

In a scenario where a primary / secondary relationship exists and the primary touchpoint has been recorded, to record a secondary touchpoint, locate the touchpoint dashboard:

In the Recent TouchPoints section of My Dashboard, or Program Management Forms section or Special sections of the job seeker dashboard, the touchpoint dashboard will be an underlined link under the dashboard column. Click the link to be directed to the touchpoint dashboard.

Take Action	Dashboard	Date Completed	Date Last Updated	Recorded By	Identifier	Office Location	Program Funding Type	Category of Obligation	Obligation Start Date	Obligation End Date
	<a href="#">Obligations (NEW) Dashboard</a>	11/30/2015	11/30/2015	Sandy Staff Larsen		Pacific Mountain WDC	TAA/Trade			

+ New

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

### Obligation Information

Office Location: Pacific Mountain WDC  
 WDA: WDA 1  
 Program Funding Type: TAA/Trade  
 Program: ETSF - E&T Foot Stamp

Upload Approved Contract:

Out of State: No  
 Farmer Fisher: No  
 Lump Sum: No

### Obligation Section Details

You have no recent TouchPoints.

+ New

---

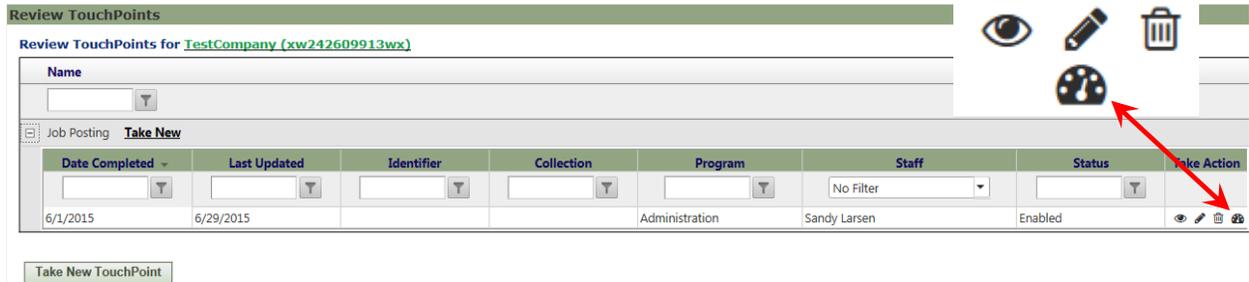
### Payment Details

You have no recent TouchPoints.

+ New

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

Locate the recorded primary touchpoint in the Review TouchPoints page. Select the “dashboard icon” to the far right of the recorded touchpoint to be directed to the touchpoint dashboard.



Recorded secondary touchpoints can be viewed on the **primary touchpoint dashboard** in one of the recent touchpoints sections (renamed for easier visibility.)

Remember, the primary touchpoint dashboard is visible only when the primary touchpoint has been recorded.

Note: A primary touchpoint may have multiple secondary touchpoints. A secondary touchpoint can never be a primary touchpoint.

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

## Multiple Subject TouchPoint

A touchpoint can be recorded for more than one subject (job seeker or employer) at a time as a time saver for staff. Questions that apply to all subjects are answered once for all (identified with a two head icon), questions that are unique to each subject are answered separately (identified with a one head icon).

(An analogy: several paper forms stacked one on top of another, with carbon copy sheets placed under each form for the first two questions only. Answers to those questions are copied to all forms. Answers to the remaining questions are individual answers per form.)

**Although the touchpoint appears to be recorded in one form, a separate touchpoint is created for each subject.**

Multiple Subject Touchpoints can be taken for:

- Multiple job seekers (a random group, group cannot be accessed again at a later time)
- Multiple employers (a random group, group cannot be accessed again at a later time)

Multiple subject touchpoints are completed the same way a single subject touchpoint is completed. However, multiple subjects are selected to associate with the touchpoint.

Select “Record TouchPoint” under TouchPoints on the Navigation bar.



From the drop box, select the name of the touchpoint that should be recorded and click “Continue.”

If prompted, select the subject type.

For multiple job seekers, select “**Participant.**”

For multiple employers, select “Entity.”

Check the boxes of job seekers (or employers) to be included in the touchpoint and click “Continue.”

Note: Not all touchpoints are configured to be taken for multiple subjects. If the touchpoints is not configured for multiple subjects, only one name can be selected.

**Record TouchPoint**

Select TouchPoint: Non-Federal Activity Continue

---

**Participants**

**Include Dismissed Participants**

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	<input type="checkbox"/>	Name
		<input type="text"/>
1	<input type="checkbox"/>	0Collection Placeholder Fake, First Name12
2	<input type="checkbox"/>	achu29, Fake
3	<input type="checkbox"/>	Adams, James
4	<input checked="" type="checkbox"/>	Adams, Moses
5	<input type="checkbox"/>	Allen, Jesse
6	<input checked="" type="checkbox"/>	ALLEN, LINDA
7	<input type="checkbox"/>	ANDERSON, AARON
8	<input checked="" type="checkbox"/>	Anderson, Emily
9	<input type="checkbox"/>	Anderson, Hannah
10	<input checked="" type="checkbox"/>	Anderson, Jennifer
11	<input checked="" type="checkbox"/>	BACON, MARK

Questions identified with a two-head icon are answered for the entire group. Individual answers are not possible. Complete the touchpoint with the “All” option highlighted in white in the upper left corner to record answers that apply to All.

Questions identified with a one-head icon are answered individually. Select each name to answer the one-head icon questions (the highlight will change to white)

Indicated in **red** above: Two-head icon questions are copied to each individual’s touchpoint, and the answer will be the same for everyone. The answer can be edited if needed, but will apply to all.

Indicated in **green** above: For one-head icon questions, customize individual answers by clicking a subject’s name on the left side of the screen and (highlight will change to white) and record answers as they pertain to that individual.

Although recorded as a group, an individual touchpoint is recorded for each seeker in the list. Touchpoints can be viewed on each subject’s dashboard, or all will be listed separately on “My Dashboard.”

December 2015

## 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.

**Recent TouchPoints**

 **My Recent TouchPoints**

Take Action	TouchPoint Dashboard Collection	Program	Name	Subject Type	Status	Date Completed
   	<a href="#">Job Posting</a> <a href="#">Job Posting Dashboard</a>	Administration	<a href="#">TestCompany (xw242609913wx)</a>	Entity	Enabled	6/1/2015

### To edit data in touchpoint response forms:

- Navigate to the dashboard or Review TouchPoints page and click the pencil icon next to the touchpoint response form.
- Complete all necessary updates in the form.
- Click "Save."

## Schedule an Event

Scheduling an event and Mass Scheduling is performed using the collection feature. This is a custom feature for WorkSource. Instructions found in the ETO Help Manual do not apply.

Training and documentation for event and mass scheduling will occur in a separate session.

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## Hands-On Activity – TouchPoints – Dislocated Worker

A seeker comes into your office and states she has an account and has posted her resume. She has been applying for jobs as a nurse's aide but her work experience has been primarily in customer service, fast food and most recently as a daycare provider at her church. Your seeker did not have enough consistent employment to qualify for unemployment insurance when her last job ended. She worked briefly as a nurse's aide but did not have the opportunity to get a certification. She enjoyed the work and believes that with a certification as a nurse's aide she could get a job at least \$10.00 per hour.

**Step 1:** Locate seeker by selecting your office and using Quick Search to access "Seeker's" Dashboard

- If seeker is not active in your office, search by **site** to verify she is in Customer Management and has a Job Match account. **If yes, add seeker to your office.**
- If no, assist seeker in creating a Job Match account: set seeker up at a computer, provide URL to Job Match, and guide seeker through creating an account (ie, fill out all information, including vet status, msfw, etc). Assist seeker with the tools available in Job Match (Budget Calculator, Career Profile.) If seeker has a mobile phone, ensure number is entered in Job Match (which will allow user to communicate via Engage)

**Step 2:** Verify seeker has a resume by going to the Review Touchpoints page, and locating the resume touchpoint that was integrated into Customer Management from Job Match.

- If yes, check to ensure all education and employment history is completed, then continue to step 3.
- If a 'Resume' touchpoint is not listed, seeker has not created a resume in Job Match. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)

**Step 3:** Locate the Program Management Forms section on the seeker's dashboard, and click + New.

- Select the touchpoint: **WIOA Eligibility Application** from the drop down menu.
- On first tab, under Eligibility Type, select Full WIOA Eligibility. Complete each tab for Full WIOA Eligibility.
- In the last tab, Eligibility Outcomes, include the following note in the *Eligibility Case Note*: The seeker has been approved for CNA training through the WIOA Dislocated Worker (DW) Program. Seeker needs required uniform for the clinical portion of the training CNA training. The seeker has explored the following resources, friends and family, and no other resources are available.
- Save touchpoint

**Step 4:** From Program Management Forms, click +New and select and complete **WIOA Enrollment**

- Click the box for Dislocated Worker (optional: review specific programs and choose any additional programs)
- Save touchpoint

**Step 5:** From Program Management Forms, click +New and select and complete **Individual Participant Plan**

**Step 6:** Locate the **Individualized and Training Services** section on the seeker's dashboard, and click + New. In the Service Code drop down, select Program Support Services (other), include date

- Set up a follow-up alert for yourself for the next appointment
- Save touchpoint

**Step 7:** Locate the **Obligations** section on the seeker's dashboard, and click + New. Obligations (NEW) is a *primary touchpoint*. Fill out the 'Obligations (New)' touchpoint with the appropriate information: Obligation Type, Start/End Date, and Obligation/Deobligation amounts are critical fields. Note that the Obligation/Deobligation amounts are entered on the second tab of the Touchpoint. Use the 'Identifier' field at the top of the first tab to help identify this obligation at a glance on the Seeker's dashboard later on. When completed, click 'Submit.'

- Return to the seeker's dashboard. Note that the Obligations (NEW) touchpoint is listed in the "Obligations" section. Click the underlined link Obligations (NEW) Dashboard under the Dashboard column to record secondary touchpoints to the primary touchpoint Obligations (NEW).
- Select '+ New' in the Obligation Section Details section of the dashboard.
- Fill out the **Obligations Section Details (New)** touchpoint (a secondary touchpoint) with the appropriate information. This form allows users to break up the total Obligation/Deobligation amounts across academic quarters or fiscal periods. The Section Number, Start/End Date, Academic Number, and Obligation/Deobligation amounts are critical fields.
- After the initial section details have been entered, click 'Save and Add Similar' to record the appropriate information for subsequent sections related to the same Obligation.
- Note the Obligation Summary for seeker is now at the top of the Obligations (NEW) Dashboard.

## Hands-On Activity – TouchPoints – Wagner Peyser / Labor Exchange

### Wagner Peyser / Labor Exchange

Your seeker has worked at same company for almost 30 years. She has experienced a number of on-the-job injuries which she stated, restrict her physical activity. She is currently in a customer service/receiving clerk position. She is about to be laid off and wants to know her options. She has a high school diploma. She has no resume and has no idea how to do a job search. She is interested in training.

After her meeting with you, she applied for a position. She informs you she has received an invitation to interview for a position.

**Step 1:** Locate seeker by selecting your office and using Quick Search to access “Seeker’s” Dashboard

- If seeker is not active in your office, search by **site** to verify she is in Customer Management and has a Job Match account. If yes, add seeker to your office.
- If no, assist seeker in creating a Job Match account.

**Step 2:** Assist seeker in updating Job Match Profile

- Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)
- Check to ensure all education and employment history is completed, then continue to step 3.
- Ensure seeker answers the disability questions.
- If seeker has a mobile phone, ensure number is entered in Job Match (which will allow user to communicate via Engage)

**Step 3:** From seeker’s dashboard, locate the **Basic Career Services** section and select + New

- Fill in the information to capture initial meeting: Career Guidance Services. Save and record similar.
- Record another Basic Service: Staff Assisted Job Search
- Record another Basic Service to capture she attended the resume class. Since several seekers will attend this class, identify the seeker’s names, and record this service using the Multiple Participant feature (recording services for a group)  
Service code could be: Module 5 Effective Resumes
- Set up a follow-up alert for yourself for the next appointment.

**Step 4:** Suggestion only (no action to take in Customer Management): make referral to WIOA orientation/eligibility for potential training.

**Step 5:** From seeker's dashboard, locate the **Program Management Forms** section and select + New. Select and complete the touchpoint Case Note with following notes: *She received an email from an employer to interview for the position.*

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## Hands-On Activity – TouchPoints – MSFW

### MSFW

Felix is a 39 year old migrant worker who has limited education and is interested in finding a job indoors. He does not have a resume or a generic application. He would like to switch from the apple industry into a food processing factory. He would like assistance with the application process for the factory.

**Step 1:** Assist seeker in creating an account in Job Match. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating an account (fill out all information, including vet status, msfw, etc.) Note: Answering the MSFW questions will populate the MSFW List found in the shortcut section in My Dashboard.

**Step 2:** Assist seeker in creating a resume. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)

- Check to ensure all education and employment history is completed, then continue to step 3.

**Step 3:** Assist seeker in filling out a Budget Calculator in Job Match. This will help guide seeker in the wages needed for his new work interest. Set seeker up at a computer, provide URL to Job Match – or – impersonate seeker to assist.

- Assist seeker in filling out the Career Profile in Job Match to help him in his decision to find work. (Alternative: use impersonation to assist seeker in creating resume.)
- If seeker has a mobile phone, ensure number is entered in Job Match (which will allow user to communicate via Engage)

**Step 4:** Locate seeker in Customer Management by selecting your office and using Quick Search to access “Seeker’s” Dashboard

- If seeker is not active in your office, add seeker to your office.

**Step 5:** From seeker's dashboard, locate the **Basic Career Services** section and select + New

- Fill in the information to capture initial meeting: Career Guidance Services. Save and record similar.
- Record another Basic Service: Staff Assisted Job Search
- Set up a follow-up alert for yourself for the next appointment.

**Step 6:** To see a list of all MSFW seekers, from the user dashboard (My Dashboard), select the MSFW List found in the shortcut section of the dashboard.

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## Hands-On Activity – TouchPoints – TAA

### TAA

Seeker came in and his company is approved for Trade Act Assistance (TAA) but he has not enrolled. Field TAA Staff complete TAA application information and submit to Central Office TAA unit for Determination.

**Step 1:** Locate seeker by selecting your office and using Quick Search to access “Seeker’s” Dashboard

- If seeker is not active in your office, search by site to verify he is in Customer Management and has a Job Match account. If yes, add seeker to your office. If no, assist seeker in creating a Job Match account.

**Step 2:** Verify seeker has a resume by going to the Review Touchpoints page, and locating the resume touchpoint that was integrated into Customer Management from Job Match.

- If yes, check to ensure all education and employment history is completed, then continue to step 3.
- If a ‘Resume’ touchpoint is not listed, seeker has not created a resume in Job Match. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)

**Step 3:** From Program Management Forms, click +New and select and complete **TAA Determination** with following information:

*Equal Opportunity is the Law, Release of Information and Data Sharing Agreement, Participants Agreement and NAFTA/Trade Act Complaint and Grievance Procedures all of which seeker signed and was given copies. Seeker also signed waiver and was given copy and scheduled new appointment one month from now for waiver review. Seeker is a former employee of Boeing and lost job as a result of downsizing. Seeker has been actively seeking suitable employment in the area and so far has had no luck finding employment. Advised seeker to document all efforts to find suitable employment. Seeker is considering training if unable to find suitable employment and is currently researching these options. Gave seeker information about available training and asked to begin the process of researching school and other employment options. Discussed unemployment benefits, extensions, TRA, TB and HCTC as related to seeker employment and training goals.*

**Step 4:** From Program Management Forms, click +New and select and complete **TAA Individual Training Plan** with following information. Complete all tabs:

*Met with student and approved training plan to attend Lower Columbia College in Engineering Technician Program starting 01/30/2015 and ending 06/15/2017. Student will maintain higher of minimum 85% attendance for all classes or program specific attendance requirements. Student will provide syllabus, registration, and grades monthly or as soon as received, and will check in with counselor at least monthly. Student will notify counselor at first time they perceive there may be challenges with successful completion of any course so counselor may provide assistive services as appropriate.*

*Mark brought in syllabus, matched with registration previously given me. Mark is taking 3 required classes at 13 total credits (full time). Mark submitted book store sale slip for 200 dollars.*

**Step 5:** From seeker's dashboard, locate the **Basic Career Services** section and select + New

- Set up a follow-up alert for yourself for the next appointment.

## Hands-On Activity – TouchPoints – Veteran

### Veteran

Met with seeker who is homeless, has self-disclosed PTSD and transportation concerns. He is motivated to overcome his barriers and has continued to follow through with short-term goals through the Veterans Program. I referred him to the local County Veterans Relief Fund, and to Veterans Service Officer at Joint Base Lewis McCord. Provided an Employment Referral to Beach Lawn Care and Maintenance for a lawn care specialist position.

- Two days later, seeker called and stated he provided the wrong phone number. He does not have access to a computer to make changes to his profile.
- Seeker called two weeks later stating he is now employed.

### **PRIOR TO DOING ANYTHING ELSE, THANK VETERAN FOR HIS SERVICE**

**Step 1:** Assist seeker in creating an account in Job Match. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating an account (fill out all information, including vet status, msfw, etc.) Ensure disability questions are answered to address PTSD.

- If seeker has a mobile phone, ensure number is entered in Job Match (which will allow user to communicate via Engage)

**Step 2:** Assist seeker in creating a resume. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)

- Check to ensure all education and employment history is completed, then continue to step 3.

**Step 3:** Suggest or assist seeker in filling out a Budget Calculator in Job Match. This will help guide seeker in wages needed. Set seeker up at a computer, provide URL to Job Match – or – impersonate seeker to assist.

- Suggest or assist seeker in filling out the Career Profile in Job Match to help him determine a field of work.

**Step 4:** Locate seeker in Customer Management by selecting your office and using Quick Search to access “Seeker’s” Dashboard

- If seeker is not active in your office, add seeker to your office.

**Step 5:** From seeker's dashboard, locate the **Basic Career Services** section and select + New

- Fill in the information to capture initial meeting: Career Guidance Services. Record information: Seeker attended Veterans workshop. Provided general WorkSource orientation information, reviewed his resume and provided resources for veterans to utilize. Provided job search assistance and suggested he attend the Resume Workshop here at WorkSource. Save and record similar.
- Record a **Basic Service**: Attended Veteran Job Fair. (put in notes) Save and record similar.
- Record a **Basic Service**: Veteran attended WorkSource resume class. Save and record similar. (note: this is one that can be recorded as a Multiple Participant along with others who attended the resume class)
- Record a **Basic Service**: Enroll him into the Disabled Veteran Outreach Program (a program code on the Basic Service touchpoint.) Save. (note: this code not available at time of print, but is forthcoming)
- Set up a follow-up alert for yourself for the next appointment.

**Step 6:** Referral: If you provide the seeker with a job id, seeker can search in Job Match for the specific job. Seeker would then apply via Job Match.

- For a specific job, find the job ID. Use Quick Search, search on entities for Beach Lawn Care and Maintenance (xw242616122wx). From the fly-out, select View/Record TouchPoint. Open the Job Posting touchpoint to obtain the Job ID. Give Job ID to seeker. Seeker can then go into Job Match and search/apply using the specific Job ID.
- Alternative: show seeker how to conduct a general search, and guide him to a list of jobs, or to a specific job.

**Step 7:** After seeker leaves office, he calls with updated phone number. Impersonate seeker, and edit his phone number in Job Match.

**Step 8:** When seeker calls to indicate he interviewed and was hired, use Quick Search to search on entities for Beach Lawn Care and Maintenance (xw242616122wx). From the fly-out, select View/Record TouchPoint. Open the Job Posting touchpoint. Go to the dashboard icon to the far right of the Job Posting to open the touchpoint dashboard. Locate the Job Placements section. This is where the Job Placement touchpoint will be if the employer filled out a job placement in Job Match. Encourage employer to record this information in Job Match. If employer is not likely to fill in information, click + New to open the Job Placement form. Fill in information to record seeker has been hired for this job.

**Step 9:** From seeker's dashboard, locate the **Program Management Forms** section and select + New

- Select and complete the touchpoint Case Note to record seeker's concern regarding transportation

## Hands-On Activity – TouchPoints – WIOA in School Youth

### WIOA In School Youth

Seeker is an 18 year old high school senior at risk of dropping out as she is behind in credits. She is unemployed and currently receiving Public Assistance in the form of Food Stamps, therefore qualifying for WIOA services by meeting income guidelines and requiring additional assistance by being at risk of dropping out. She is a single mother of one. She is behind in credits and currently enrolled in a credit retrieval program at RA Long High School. She attends two hours daily and should earn her diploma by June 2016. She relies on her grandparents for Room and Board. She is interested in gaining experience in the medical field as a Certified Nursing Assistant, and eventually becoming a Registered Nurse. She would like to attend NAC training while also attending credit retrieval courses. I discussed this with her counselor as well as our NAC training provider. As long as she passes the assessment test, she will be eligible to attend training before she obtains her High School Diploma. She researched both occupations on Workforce Explorer and learned both are In-Demand in our area. She also researched the Self-Sufficiency Calculator and learned wages she will need to earn to become self-sufficient.

**Step 1:** Locate seeker by selecting your office and using Quick Search to access “Seeker’s” Dashboard

- If seeker is not active in your office, search by site to verify she is in Customer Management and has a Job Match account. If yes, add seeker to your office. If no, assist seeker in creating a Job Match account.

**Step 2:** Verify seeker has a resume by going to the Review Touchpoints page, and locating the resume touchpoint that was integrated into Customer Management from Job Match.

- If yes, check to ensure all education and employment history is completed, then continue to step 3.
- If a ‘Resume’ touchpoint is not listed, seeker has not created a resume in Job Match. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)

**Step 3:** Locate the Program Management Forms section on the seeker's dashboard, and click + New.

- Select the touchpoint: **WIOA Eligibility Application** from the drop down menu.
- On first tab, under Eligibility Type, select Full WIOA Eligibility. Complete each tab for Full WIOA Eligibility.
- Include the following case note on the last TAB - *Eligibility Case Note*: The seeker has explored the following resources, friends and family, and no other resources are available. Save

**Step 4:** From Program Management Forms, click +New and select and complete **WIOA Enrollment**

- Click the box for WIOA In School Youth (optional: review specific programs below and choose any additional programs) click SAVE

**Step 5:** From Program Management Forms, click +New and select and complete **Individual Participant Plan**

**Step 6:** Locate the **Individualized and Training Services** section, and select + New.

- In the Service Code drop down, select Program Support Services (other): Enter Support Service information: (Your seeker) is scheduled to begin training next week for NAC. She has requested assistance with payment for scrubs, shoes and a watch for training. All of her current family income is used for housing and other living expenses. If it is determined to supply a voucher, follow standard process. Identified credit recovering program within school district to obtain lacking credits in order to graduate.
- Set up a follow-up alert for yourself for the next appointment.

**Step 7:** Locate the **Obligations** section on the seeker's dashboard, and click + New. Obligations (NEW) is a *primary touchpoint*. Fill out the 'Obligations (New)' touchpoint with the appropriate information. Obligation Type, Start/End Date, and Obligation/Deobligation amounts are critical fields. Note that the Obligation/Deobligation amounts are entered on the second tab of the Touchpoint. Use the 'Identifier' field at the top of the first tab to help identify this obligation at a glance on the Seeker's dashboard later on. When completed, click 'Submit.'

- Return to the seeker's dashboard. Note that the Obligations (NEW) touchpoint is listed in the "Obligations" section. Click the underlined link Obligations (NEW)

Dashboard under the Dashboard column to record secondary touchpoints to the primary touchpoint Obligations (NEW).

- Select '+ New' in the Obligation Section Details section of the dashboard.
- Fill out the **Obligations Section Details (New)** touchpoint (a secondary touchpoint) with the appropriate information. This form allows users to break up the total Obligation/Deobligation amounts across academic quarters or fiscal periods. The Section Number, Start/End Date, Academic Number, and Obligation/Deobligation amounts are critical fields.
- After the initial section details have been entered, click 'Save and Add Similar' to record the appropriate information for subsequent sections related to the same Obligation.
- Note the Obligation Summary for seeker is now at the top of the Obligations (NEW) Dashboard.

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## Hands-On Activity – TouchPoints – WIOA Adult

### WIOA Adult

A seeker is hoping to get the support and employment counseling that he needs to be self-sufficient. He became homeless after he was let go from FedEx seasonal employment in January 2014. He needs assistance with transportation resources and job searching for more stable employment. He is currently living in his car.

**Step 1:** Assist seeker in creating an account in Job Match. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating an account (fill out all information, including vet status, msfw, etc.)

**Step 2:** Assist seeker in creating a resume. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)

- Check to ensure all education and employment history is completed, then continue to step 3.

**Step 3:** Suggest or assist seeker in filling out a Budget Calculator in Job Match. This will help guide seeker in the wages needed. Set seeker up at a computer, provide URL to Job Match – or – impersonate seeker to assist.

- Suggest or assist seeker in filling out the Career Profile in Job Match to help him in his decision to find work.
- If seeker has a mobile phone, ensure number is entered in Job Match (which will allow user to communicate via Engage)

**Step 4:** Locate seeker in Customer Management by selecting your office and using Quick Search to access “Seeker’s” Dashboard

- If seeker is not active in your office, add seeker to your office.

**Step 5:** Locate the Program Management Forms section on the seeker’s dashboard, and click + New.

- Select the touchpoint: **WIOA Eligibility Application** from the drop down menu.
- On first tab, under Eligibility Type, select Full WIOA Eligibility. Complete each tab for Full WIOA Eligibility.
- Include the following case note on the last TAB - *Eligibility Case Note*: The seeker has explored the following resources, friends and family, and no other resources are available.

**Step 6:** From Program Management Forms, click +New and select and complete **WIOA Enrollment**

- Click the box for WIOA Adult (optional: review specific programs below and choose any additional programs) click SAVE

**Step 7:** From Program Management Forms, click +New and select and complete **Individual Participant Plan**

**Step 8:** From Program Management Forms, click +New and select and **complete WIOA General Assessment**

- Record assessment that you create in the Literacy and Numeracy tab

**Step 9:** From Program Management Forms, click +New and select and complete **Outcomes, Program Completion**. Enter information: *Enrolled in warehouse logistic class and is planning to complete the following certifications: flagger, first aid and forklift.*

**Step 10:** Locate **Individualized and Training Services** section and click + New

- In the Service Code drop down, select Program Support Services (other.) Enter Support Service information. Save.
- In the Individualized and Training Services section click + New to take another Individualized and Training Services touchpoint. In the Service Code drop down, select Program Support Services transportation: Enter Support Service information :  
*Met (your seeker) as scheduled. He came today for support services. He request gas cards and working shoes. WIOA ADULT has provided him 26 gas card, each in the amount of \$10 for work related transportation support. I informed him that gas card support is limited. He did mention that he has quit with FEDEX in July after working with them for four months. The reason is the hours is not enough to live on. He will return to FEDEX during the holiday season in November and ask if he can get some transportation support. He needed some bus tickets for labor work and job searching. WIOA ADULT provided him with 20 bus tickets.*
- Set up a **follow-up alert** for yourself for the next appointment.

**Step 11:** Locate the **Obligations** section on the seeker's dashboard, and click + New. Obligations (NEW) is a *primary touchpoint*. Fill out the 'Obligations (New)' touchpoint with the appropriate information: **Funding Programs related to budget is critical**, Obligation Type, Start/End Date, and Obligation/Deobligation amounts are critical fields. Note that the Obligation/Deobligation amounts are entered on the second tab of the

Touchpoint. Use the 'Identifier' field at the top of the first tab to help identify this obligation at a glance on the Seeker's dashboard later on. When completed, click 'Submit.'

- Return to the seeker's dashboard. Note that the Obligations (NEW) touchpoint is listed in the "Obligations" section. Click the underlined link Obligations (NEW) Dashboard under the Dashboard column to record secondary touchpoints to the primary touchpoint Obligations (NEW).
- Select '+ New' in the Obligation Section Details section of the dashboard.
- Fill out the **Obligations Section Details (New)** touchpoint (a secondary touchpoint) with the appropriate information. This form allows users to break up the total Obligation/Deobligation amounts across academic quarters or fiscal periods. The Section Number, Start/End Date, Academic Number, and Obligation/Deobligation amounts are critical fields.
- After the initial section details have been entered, click 'Save and Add Similar' to record the appropriate information for subsequent sections related to the same Obligation.
- Note the Obligation Summary for seeker is now at the top of the Obligations (NEW) Dashboard.

## Hands-On Activity – TouchPoints – WorkFirst

### WorkFirst

Your seeker was referred from DSHS for the WorkFirst Orientation. She has worked two jobs in fast food but has not maintained her jobs after having children:

**Step 1:** Locate seeker by selecting your office and using Quick Search to access “Seekers Name” Dashboard

- If seeker is not active in your office, search by site to verify she is in Customer Management and has a Job Match account. If yes, add seeker to your office. If no, assist seeker in creating a Job Match account.

**Step 2:** Verify seeker has a resume by going to the Review Touchpoints page, and locating the resume touchpoint that was integrated into Customer Management from Job Match. If yes, continue to step 3. If a ‘Resume’ touchpoint is not listed, seeker has not created a resume.. Set seeker up at a computer, provide URL to Job Match, and guide seeker through creating a resume. (Alternative: use impersonation to assist seeker in creating resume.)

**Step 3:** From seeker’s dashboard, locate Program Management Forms section, click +New and select and complete **WorkFirst**

- Complete each tab for WorkFirst – Registration, Employment 1, Employment 2

**Step 4:** From seeker’s dashboard, locate **Basic Career Services** section and click + New

- In the Service Code drop down, select Services that you provided. Save and record similar if there are additional services to record.

**Step 5:** From seeker’s dashboard, locate **Individualized and Training Services** section and click + New

- In the Service Code drop down select Program Support Services (other): Record clothes paid for by seeker.
- Set up a follow-up alert for yourself for the next appointment.

## Hands-On Activity – TouchPoints – WIOA Dislocated Worker

### WIOA Dislocated Worker

Emma has been participating in the WIOA Dislocated Worker program since June 1, 2015. She has been attending South Seattle Community College in a short term training for call center agents. She just completed the course and is now in the office with her certificate of completion. She is ready to take the next steps for a job. She needs help with her resume; she needs to add her certificate to her record so it is viewable by potential employers. Emma also states that her car needs some repair in order to get to interviews.

**Step 1:** Locate seeker by selecting your office and using Quick Search to access “Seeker’s” Dashboard

- If seeker is not active in your office, search by site to verify she is in Customer Management and has a Job Match account. If yes, add seeker to your office.

**Step 2:** Set seeker up at a computer, provide URL to Job Match, and guide seeker through updating her resume in Job Match and uploading her certificate to Job Match (use upload files feature.)

**Step 3:** From seeker’s dashboard, locate the **Basic Career Services** section and select + New

- Fill in the information to capture initial meeting: Career Guidance Services.
- Set up a follow-up alert for yourself for the next appointment

**Step 4:** From seeker’s dashboard, locate Program Management Forms section, click +New and select and complete **Outcomes, Program Completion**

- Enter the end date and certificate earned

**Step 5:** From Program Management Forms, click +New and select and complete **Individual Participant Plan** to deal with the car repair data – use the sections on Supportive Services and Case Notes to record her data.

**Step 6:** If anything needs to be done with Obligations, find and update the relevant Obligation touchpoint.

**Step 7:** From Program Management Forms, click +New and select and complete the touchpoint: **Exit & Exclusion**

- If Emma's participation is over, from Program Management Forms, click +New and select and complete the touchpoint: **Follow-up**.

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## Hands-On Activity – TouchPoints – Employer TouchPoints

### View employer data integrated from Job Match to Customer Management

(You will need an employer login for this exercise. If you do not have an approved employer account in Job Match, use an account provided in training...then generate the following:)

#### Log in to the Job Match site. **Post a valid Job Posting**

This creates a primary touchpoint in Customer Management called Job Posting.

Log in to Customer Management. Locate the touchpoint generated for the valid Job Posting.

Log in to the Job Match site. Post a second Job Posting to trigger a **potential fraudulent job posting** (you can use the words “personal bank account” in the description.)

Log in to Customer Management. Note the Job Posting touchpoint has not been created for the potential fraudulent job posting. Instead, a Pending or Fraud Job Postings touchpoint has been created - note the disposition tab.

If an admin is available to approve the potentially fraudulent job posting, once approved user should see “Activated” in the job disposition field (on job disposition tab) of the Pending or Fraud Job Posting and a new Job Posting touchpoint created for this job.

#### Record the following touchpoints for your employer:

Job Placement (secondary touchpoint to the valid Job Posting above)

Independent touchpoints:

Customer Satisfaction Survey  
Employer Service

(This page intentionally left blank)

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## Lesson 6: Dashboards

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

A dashboard (in any context) can be equated to a series of tools and views that showcase a user’s absolute necessities. Think about a vehicle dashboard. The indicators, fuel gage, oil lights, odometer, and tachometer all help you operate the vehicle safely, and alert you to major changes. These “parts” of the dashboard do not showcase **all** of the information about the car (windshield wiper fluid, for example). The dashboard is reserved exclusively for vital information.

Customer Management dashboards work in the same way, and are fully customizable to information that is vital for display. Users can customize their dashboard to make work in the system more efficient. For uniformity, administrators may create dashboard templates and assign the templates to specific user roles and office locations.

Customer Management has several different dashboards for various purposes. The two main dashboards in the system are the user dashboard (My Dashboard) and the job seeker dashboard. *(Reference dashboard navigation section for instructions on accessing My Dashboard and job seeker dashboard.)*

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:

**Test Seeker123's Recent TouchPoints**

Take Action	TouchPoint	Dashboard	Collection	Program	Date Completed	Date Last Updated
	Saved Occupations			American Lake/Pierce County	6/4/2015	6/4/2015
	Demographic Details	<a href="#">Demographic Details Dashboard</a>		Administration	6/4/2015	6/4/2015
	Cover Letter			American Lake/Pierce County	5/30/2015	5/30/2015

- 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 within Customer Management:

**User Dashboard** (My Dashboard) – described in **Quick Tabs – My Dashboard** section. Displays recent information recorded by the user for job seekers, employers, or service providers. Information is not specific to a subject type; it is the collective work of the user. My Dashboard will also display reports or query results, as created by the administrator or user. Administrators can make My Dashboard the default landing page for all users.

To access, select the labeled quick tab at the top of the software, from any page.

**Job Seeker (participant) Dashboard** – described in **Dashboard Navigation – Job Seeker Dashboard** section. Displays General Information and recent data recorded for the job seeker. Access to additional information provided via links displayed on dashboard.

To access, search for a job seeker. Click the green arrow next to the name of job seeker to display the Fly-Out menu. The job seeker dashboard link is the first link in the Fly-Out menu.

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

To access, search for an employer. Click the green arrow next to the name of employer to display the Fly-Out. The employer dashboard link is the first link in the Fly-Out menu.

**Collection Dashboard** – See training documentation for event scheduling.

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

## Dashboard Customization

Dashboards are fully customizable unless site administrator has removed permissions.

Note: editing “My Dashboard” is specific to user account. Editing all other dashboards will apply to **ALL** subjects of that type; i.e., editing a job seeker dashboard will apply to all job seekers’ dashboards.

**Edit dashboard:** Click “Edit Dashboard” at top right of screen.



The Edit dashboard screen previews sections currently used on the dashboard. Each “box” is called an ETO Part.

To make changes to an ETO Part:



1. **Maximize dashboard part:** This defaults the part to maximum view ability from dashboard.
2. **Minimize dashboard part:** This defaults the part to minimal view ability from dashboard.
3. **Disable dashboard part:** Removes the part from the dashboard. The part remains in the ETO Parts Catalog for future use.
4. **Delete dashboard part:** Removes the part from the dashboard. The part remains in the ETO Parts Catalog for future use.
5. **Edit dashboard part:** Rename the part, reorganize the part’s placement and order on dashboard, and default dashboard view ability.

**Edit ETO Parts:** Click the pen/paper icon to edit the ETO Part



1. Rename ETO Part.
2. Select Normal or Minimized as the default state.
3. Select zone for placement. There are 5 available zones for placement: Top, Left, Middle, Right, and Bottom.
4. When more than one ETO part is placed in a zone, reorder via Zone Index. 0 places the ETO part on top, 1 places ETO part 2<sup>nd</sup>, etc.
5. Indicate the maximum number of recent records to be displayed on the dashboard.

**Remove ETO Parts:** Click the trashcan icon on the top right of the ETO Part. Once a part has been deleted, it can be re-added via “Add ETO Part.”

**Add ETO Part:** While in Edit dashboard mode, at top right of dashboard, click “Add ETO Parts.” This will launch the ETO Parts Catalog.

The ETO Parts catalog includes the ETO Parts applicable to the type of dashboard being edited. (Screenshot represents ETO parts that can be added to “My Dashboard.”)

Check the box or boxes of parts to be added. Select a zone to place the part in the top, left, middle, right or bottom. Click “Add.”

Notice that the same part can be added multiple times. Each part can be re-named using a different name if desired.

For example: Add the “Recent TouchPoints” part more than once. Click the pen and paper icon on the top right of the part and filter each ETO Part for a specific touchpoint. Rename the part for the specific touchpoint and save.

## ETO Parts Catalog Descriptions:

- **Action Links** - This part serves as quick links to common data entry functions used in the software. Taking an action from these links will redirect the user back to My Dashboard after the action is completed.
- **ETO Insight** - This part displays a report that allows users to see correlation between data that has been captured in up to four touchpoint questions.
- **Query Wizard** - Displays results from custom queries that have been shared.
- **Recent Participant/Entities** – This part displays recent job seekers/employers that have registered in Job Match. Each name will link back to that job seeker/employer’s dashboard.
- **Recent TouchPoints** – Shows recent touchpoints completed. This section can be filtered to show results for a single touchpoint or for a tag.
- **Reports** – Shows report results for shared reports that have been created with ETO Results (both Custom and Standardized reports that appear in the My Reports section on the View Reports page) are available for this part.

Click “Close” to close the ETO parts catalog.

Click “Done Editing” located at the top right of page to save dashboard edits.

## Hands-On Activity Dashboards

### Review:

Navigate and investigate a job seeker dashboard

Navigate and investigate an employer dashboard

Navigate and investigate a touchpoint dashboard.

Access the touchpoint dashboard via the Seeker dashboard

Access the touchpoint dashboard via the Review TouchPoint screen

(Hint: a touchpoint dashboard is viewable only by going to a **primary** touchpoint and selecting the dashboard for the primary touchpoint)

Investigate the shortcuts on the seeker and entity dashboards. Open each one.

### Customize Dashboard:

#### Edit ETO Parts

Edit “My Dashboard”

Rearrange ETO Parts

Use the icons to take action on various ETO parts

Edit an existing ETO Part. (i.e., change name or filter)

Save changes

#### Add ETO Parts

Add one or more ETO Parts.

Place ETO Parts in the same zone.

Rearrange order of ETO Parts.

Change zone for one of the ETO Parts.

Save changes.

## Lesson 7: ETO Engage

**ETO Engage** provides two-way communication tools to job seekers 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 Customer Management, alert staff of an emergency issue with a text message, or deliver a direct phone call.

To access ETO Engage, go to My Dashboard and click the shortcut “Communicate via ETO Engage.”

You are logged into **WorkSourceWA PRODUCTION**

Shortcuts

Home   Record Non-Federal Service   **Communicate via ETO Engage**   Create Seeker Account

Labor Exchange Admin Tools

---

Recent Participants/Entities

Recent Participants

Name
Test Seeker123

Recent TouchPoints

My Recent TouchPoints

Take Action	TouchPoint	Dashboard	Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date
	Participation	<a href="#">Participation Dashboard</a>		Clover Park Community College	Seeker123, Test	Participant	Enabled	7/1/2015	7/1/2015	7/1/2015
	Participation	<a href="#">Participation Dashboard</a>		Clover Park Community College	Seeker123, Test	Participant	Enabled	7/1/2015	7/1/2015	7/1/2015

ETO Engage and Customer Management via cannot be open simultaneously. When the ETO Engage link is clicked, the ETO Engage software is opened.

Engage

WorkSource Administration

Home

Self Service

Direct Connect

Reporting

Home

✓ Welcome to ETO Engage (v1.0), start sending Self Service Requests and Direct Connects today!

[Self Service](#) via Email — send participants a link to take a TouchPoint

The Self Service [Email](#) function is a quick and easy way to allow your participants to complete forms and surveys directly from their own computer/tablet.

[Direct Connect](#) via Telephone or SMS/Text Message

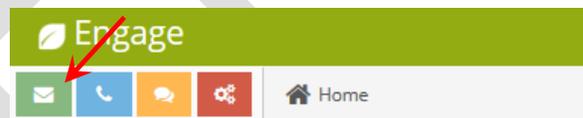
Using the Direct Connect [Telephone](#) and [SMS/Text Message](#) function will broadcast a message from ETO Engage to your participant (s) or collection(s).

## Self Service (Email)

To send an email, the standard demographic field, Email, must be completed with a valid email address for all job seekers. 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 Customer Management, and does not need a Customer Management 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 three options:

- **Job seeker – Select “Participant.”**  
Type in the first or last name of a job seeker, select the appropriate name from the results displayed, and repeat to add additional seekers as necessary.

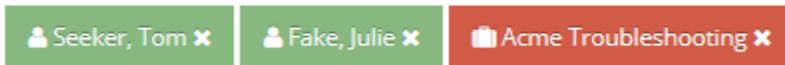
The screenshot shows the 'Email' form with the following fields and content:

- Title:** Email » send a link to your participant(s) to take a TouchPoint
- To:** A search dropdown menu with 'Participant:' as the label. The search term is 'seeker, jim'. A list of suggestions is shown below: 'Seeker, Jim', 'Seeker, Nick', and 'Seeker, Tom'. 'Seeker, Tom' is currently selected and highlighted in blue.
- Subject:** A text input field.

The third option, collections, will be discussed in the Mass Scheduling training.

A user may select a combination of recipient subject types. For example, the same email can be sent to several job seekers and several employers. The different subjects will be highlighted

To:



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 job seeker or employer contact

{LastName} The last name of the job seeker or employer contact

{TouchPoint} The auto-generated link to take the recipient to the specified touchpoint (we will select the touchpoint below)

If sending a touchpoint link, choose a touchpoint from the drop-down under the message of the email.

Seeker123, Test ✕

Participant: ▾ Search for Participants

Subject  
Survey

Message

Dear {FirstName},

To ensure our services meet your needs, please provide feedback by completing the TouchPoint at the below link:  
{TouchPoint}

Thank you,  
Case Manager

TouchPoint Customer Satisfaction Survey (Pa...)

Schedule or Send the email.

Schedule Email Send Now

Select “Send Now” to send message immediately.

If no email address is attached to a job seeker 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.”

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.

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

ETO Engage respects touchpoint security. If more than one recipient type is selected (for example, you are sending a message to both job seekers and employers) and the selected touchpoint is only configured for job seekers, the employer contact recipient will receive a permission error after clicking the touchpoint link in the email.

## Direct Connect (Phone Calls & Text Messages)

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

### 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 job seekers. 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 user 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 job seekers 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.”

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.”

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	<span style="color: blue;">■</span>
Abraham, Alba	Telephone	05/19/2014 12:45 PM	05/19/2014 1:00 PM	0	None	<span style="color: blue;">■</span>

### Send a Text Message

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

Select the recipient(s),

The standard demographic field, Cell Phone, must be completed with a valid U.S. formatted telephone number for all job seekers. 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 x Jaime Smith x

Q Entity: v 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

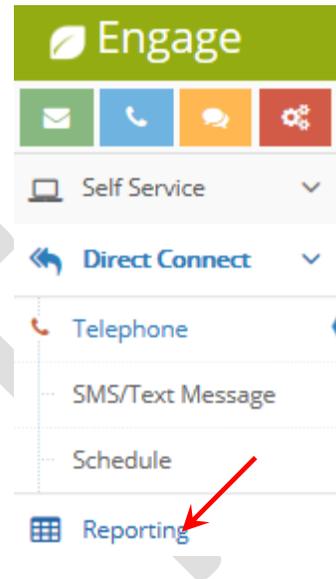
### Schedule or send the Text Message

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

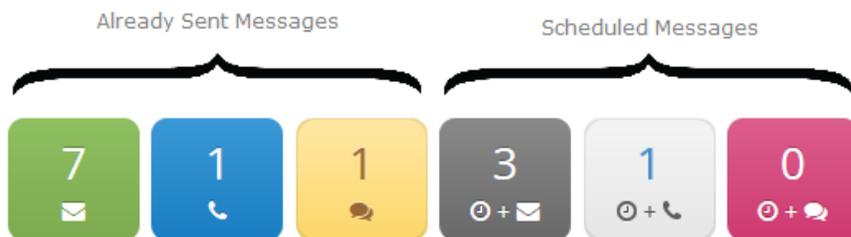
After a Direct Connect text message has been scheduled, check the scheduled text messages log by clicking the “Schedule” link under Direct Connect. To cancel scheduled text messages, click the blue box underneath the Action header to stop further text messages from being sent.

## Tracking & Reporting

To track all outgoing messages, click the reporting tab.

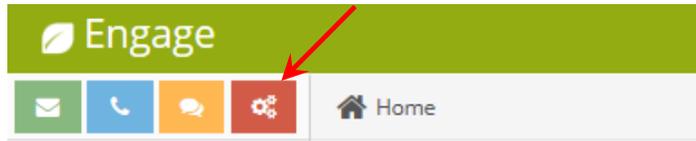


View the number of text messages, emails and phone calls sent.



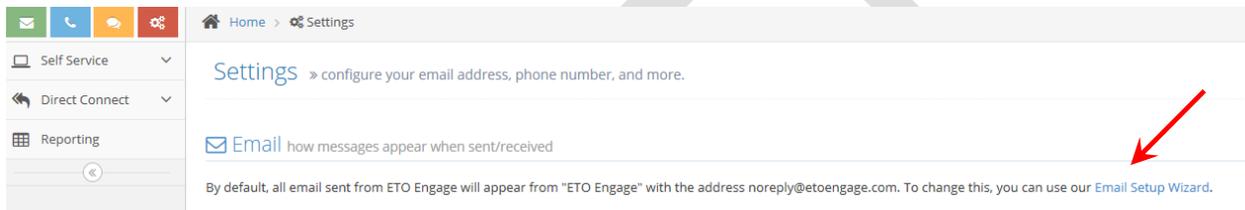
## Settings

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



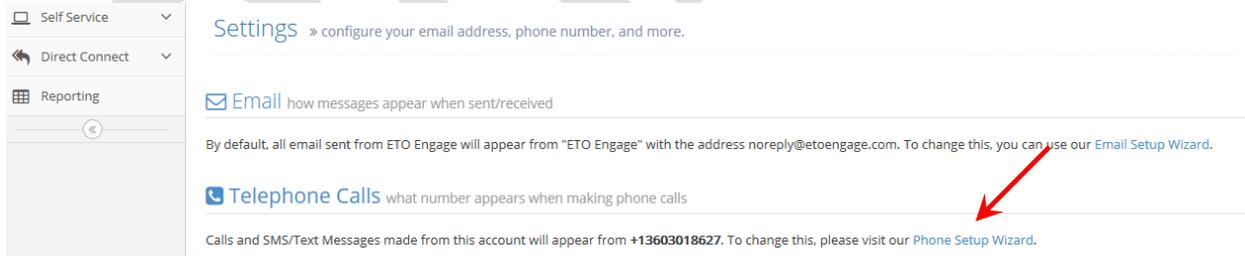
### Self Service Settings

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



### Direct Connect Settings

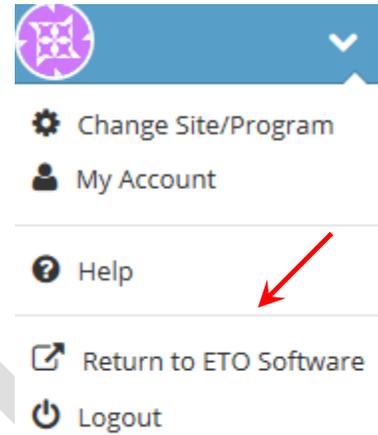
To change the phone number used for direct connect telephone calls click the “Phone Setup Wizard.”



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 Customer Management system

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



## Lesson 8: Impersonating Job Seekers and Employers

### Single Sign-On Feature

Staff can assist a job seeker or recruiter in Job Match by impersonating the job seeker or recruiter in Job Match while logged in to Customer Management. No additional sign-on to Job Match is necessary.

Edits made in Job Match will immediately integrate into Customer Management.

### Impersonate a Job Seeker

From the job seeker dashboard, select “Access Seeker/Participant Account (Job Match)” shortcut to update profile information, offer resume support, conduct job searches and provide other support services.



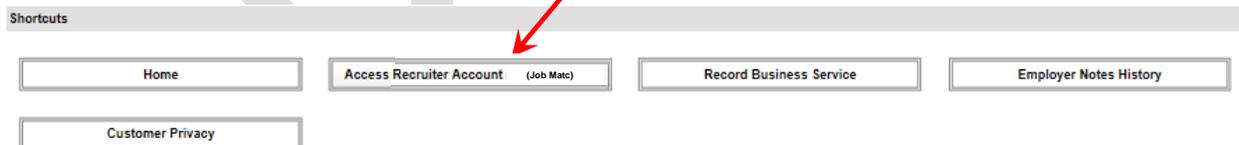
Follow Job Match instructions for working in Job Match.

To end the Job Match 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 (Job Match)” shortcut to update profile information, offer resume search support, manage job postings, and provide other employer-related support services.



Follow Job Match instructions for working in Job Match.

To end the Job Match session, click “End Session” in upper left corner.

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

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## Lesson 9: Utilizing Reports

### View Reports

Reports can be accessed from the Navigation Bar. Select Reports / View Reports (NEW)

The View Reports page will populate. Note: As new reports are created, they will be found in this section.

View Reports			
Refresh Report List			
Category Name	Category Description		
Training Reports			
Report	Report Description	Type	Options
<a href="#">Training Budget</a>		Custom	

Click on the name of the report to generate that report. Data will be generated based on Reporting Role.

Some reports may prompt for a date range or other filters. A red arrow means the prompt is required. If no red arrow, the prompt is optional.

Enter the requested information and click "Run Query."

Prompts

Reply to prompts before running the query.

Program Name: (optional) This filter will be ignored because no value has been selected.
Begin Date
End Date

Obligation Start Date (Beginning of Range) (optional) This filter will be ignored because no value has been selected.
Obligation Start Date (End of Range) (optional) This filter will be ignored because no value has been selected.
Obligation End Date (Beginning of Range) (optional) This filter will be ignored because no value has been selected.
Obligation End Date (End of Range) (optional) This filter will be ignored because no value has been selected.

Obligation Start Date (Beginning of Range)

More Information

Select or type the values you want to return to reports for each prompt displayed here.

Run Query Cancel

The report will generate in a second tab.

Note menu bar on left and tabs across the bottom for further filtering or drill-down:

The screenshot shows a web browser window displaying a report titled "Training Budget". On the left, a "Navigation Map" lists several filtering options: "By Participant", "By Office", "By Program", "By Creating Staff", "By Type and Category", "By WDA", and "By Provider and Program". A red arrow points from the "By Participant" option in the map to the "By Participant" tab in the bottom menu bar. The main content area displays a table with columns: Name, ID, Date of Plan, Office, Plan Created By, and Training Provider and Program. The table is divided into sections by subtotals. The data rows are as follows:

Name	ID	Date of Plan	Office	Plan Created By	Training Provider and Program
Adams, Moses	14499	11/11/2015	Unknown	Solutions, Inc., Social	[[_Worker Retraining Program_]_]
Subtotal					
Name	ID	Date of Plan	Office	Plan Created By	Training Provider and Program
Bartlett, Gail	14778	10/29/2015	Unknown	API, ETO Engage	[County Community College_] [Welding]_ [567234]
Subtotal					
Name	ID	Date of Plan	Office	Plan Created By	Training Provider and Program
Baun, Julie	14548	10/29/2015	Unknown	API, ETO Engage	[RTC]_ [Business Management]_ [ ]]
Subtotal					
Name	ID	Date of Plan	Office	Plan Created By	Training Provider and Program
Bleem, Toad	14826	11/10/2015	Unknown	Dolvig, Nikki	[Best Training School]_ [IT Services]_ [12345]
Subtotal					
Name	ID	Date of Plan	Office	Plan Created By	Training Provider and Program
"Box Car" Hughes, Walter	14627	10/22/2015	Unknown	API, ETO Engage	[RTC]_ [Business Management]_ [ ]]
	14627	10/22/2015	Unknown	API, ETO Engage	
	14627	10/27/2015	Unknown	API, ETO Engage	[Big Bend Community College_] [Aviation Maintenance]_ [ ]]
Subtotal					

## Hands-On Activity Reports

Run the Training Budget report.

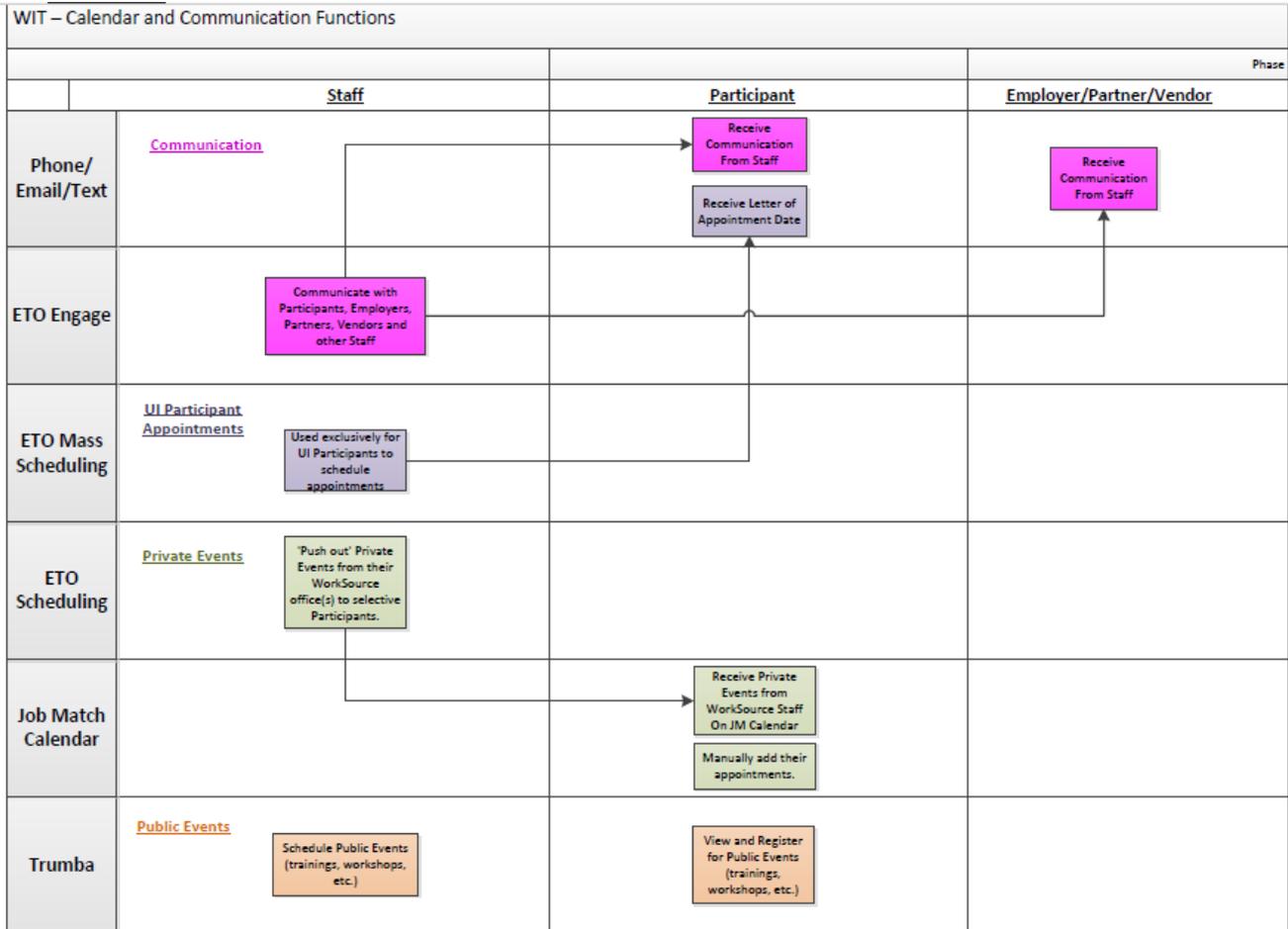
(An **Obligations (NEW)** touchpoint must be recorded for data to generate in this report...see TouchPoint hands-on activity)

Note Total Obligations/Deobligations

Note tabs on left, tabs on bottom

DRAFT

## Calendar and Communication Functions



## Glossary - Customer Management

### **Active**

A term used to define a job seeker's status in an Office Location (identified as a "program" in the system.) An "active" job seeker 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 job seeker (participant) that exists in Customer Management in to the selected Office Location (program), and enter an Office Location (program) start date. When a job seeker 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.). Customer Management comes with Standard Attributes; additional Attributes are created with the Attribute Wizard. Attributes are to employers (Entities) what demographics are to job seekers (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), job seekers, employers, TouchPoints and Collections. The user is able to view, edit, or record data from the dashboard. The dashboard can be customized by the Administrator or user to meet specific needs. Administrators have the ability to apply dashboard Templates to provide uniformity for staff.

## **Demographics**

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

## **Dismiss**

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

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

## **Entities**

A subject (typically third party) that impacts job seekers (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 Customer Management 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 job seekers or employers, deliver messages, schedule appointments, collect feedback, and initiate action.

## **Feeder Table**

Drop-down menu choices found throughout features in Customer Management. 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 job seeker’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 Customer Management 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 Customer Management system. The link to log off the system is located in the upper right corner of Customer Management. 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 Customer Management system before closing their browser to ensure data integrity.

### **Manage**

Refers to the features in Customer Management used by Administrators to make additions and modifications to Customer Management, (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 Customer Management 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 job seeker must be active in an Office Location (program) to record data/services for the job seeker. The Start Date, (the date a job seeker becomes active in the Office Location) and End Date (the date a job seeker is dismissed from an Office Location) is recorded for all job seekers.

### **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 job seeker in WorkSource.

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**Program**

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

**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 job seeker in an Office Location.

**Program Start Date**

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

**Program End Date**

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

**Projected End Date**

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

**Query**

A request for information from Customer Management 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 Customer Management that is used to search and navigate to a job seeker's or employer's record for viewing or recording data.

**Quick Tabs**

The green tabs located along the top of the Customer Management 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 job seeker 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.

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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 Customer Management. Administrators have the ability to make these reports accessible to users.

### **TouchPoints**

A touchpoint is an electronic form for collecting data in Customer Management. Data entered by job seekers and employers in Job Match is integrated in real time into Customer Management 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 Customer Management. User Account credentials include a username and password.

## Addendum

### Features Available to Enhanced Staff

The Duplicated Participants feature allows a merge of two duplicate records that the Customer Management system has identified as potential duplicates. When conducting a merge, a master record must be selected. During a merge, all touchpoint data is merged into one record. Demographics are retained for the master record only. Prior to conducting a merge, ensure the master record is updated with demographic data contained in the duplicate record.



**Although a merge of seekers or employers is possible in Customer Management, it is not possible in Job Match, therefore the data will be out of sync. Recommend this feature be utilized with supervisory approval only.**

### Merge Job Seekers

To merge duplicated job seekers, select “Duplicated Participants” located in the Participants section of the Navigation Bar.

Check the boxes to the left of the two records you would like to merge. (Only two records may be merged at one time. If three or more records need to be merged, merge two, then merge two again until all are merged.)

**Duplicated Participants**

Merge Selected Records

Page Size: 10 Total Records : 2 Export To: Excel

<input checked="" type="checkbox"/>	CLID	Case Number	First Name	Initial	Last Name	DOB	SSN	Staff	Date Updated
<input checked="" type="checkbox"/>	11296	11296	Brian		Robinson	08/18/1985		SSI USER	2/16/2015 4:23:02 PM
<input checked="" type="checkbox"/>	11297	11297	Brian		Robinson	08/18/1985		SSI USER	2/16/2015 4:23:36 PM

Merge Selected Records

Click “Merge Selected Records.”

Select a **Master record**.

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All historical information, such as touchpoint data, efforts, program history and assessments, will be merged into one account.

Only the master record's *demographic* information will be retained after the merge is complete. Demographic data in the duplicated record will be irrevocably lost. Prior to conducting a merge, always ensure any demographic data from the duplicated record is recoded to the master record.

[Start Over](#)

Select which Participant is the **MASTER** into which the other Participant's data will be merged:

	Client	SSN	Case Number	DOB	Gender	Address	Marital Status	Audit Date
<input type="radio"/>	Brian Robinson	11296		8/18/1985				2/16/2015
<input type="radio"/>	Brian Robinson	11297		8/18/1985				2/16/2015

Once a master is selected, text will pop up indicating which record is master and which is duplicate. Click "Continue."

Client	
<b>Master</b>	<input checked="" type="radio"/> Brian Robinson
<b>Duplicate</b>	<input type="radio"/> Brian Robinson

[Continue...](#)

Click "OK" on the warning box to dismiss the warning and merge the records.

Message from webpage

**?** Are you sure you want to merge all of the data associated with the **DUPLICATE** record into the **MASTER** record?

**WARNING:** This operation **CANNOT BE UNDONE**.

**NOTE:** All Demographic information (including Custom Demographics) associated with the **DUPLICATE** record will be irrevocably **DELETED**.

If both records are currently active in the same program with different start dates, the earlier start date will be maintained and the more recent record will be deleted. You may want to review the program history for these records if this is a problem.

If the **DUPLICATE** record is currently being used by another staff member to record an effort, assessment or other data type, that data may be lost if the merge is completed before the data is saved. Administrators may want to alert staff that they will be performing a merge to avoid data entry at the same time.

[OK](#) [Cancel](#)

## Merge Duplicates

Duplicate job seekers can also be merged by searching for individual job seeker names in the Merge Duplicates feature.

To merge duplicated job seekers, select “Merge Duplicates” located in the Site Administration section of the Navigation Bar.

- Search by (partial) last name, SSN or Case Number for the duplicate records.
- Only two records can be merged at one time. Check the boxes next to the two job seekers to be merged and click “Continue.”
- Select a “Master” record. All historical information, such as touchpoint data, efforts, program history and assessments will be merged into one account.

Only the master record's *demographic* information will be retained after the merge is complete. Demographic data in the duplicated record will be irrevocably lost. Prior to conducting a merge, always ensure any demographic data from the duplicated record is recoded to the master record.

- Click “Continue” to complete the merge.

## Merge Employers

(Site Administration → Duplicate Entities)

Similar to merging job seekers, merging duplicate employers will retain attributes from the master record only.

To merge duplicate employers, select “Duplicate Entities” located in the Site Administration section of the Navigation Bar.

Check the boxes to the left of the two records to be merged. (Only two records may be merged at one time. If three or more records need to be merged, merge two, then merge two again until all are merged.)

Click “Merge Selected Records.”

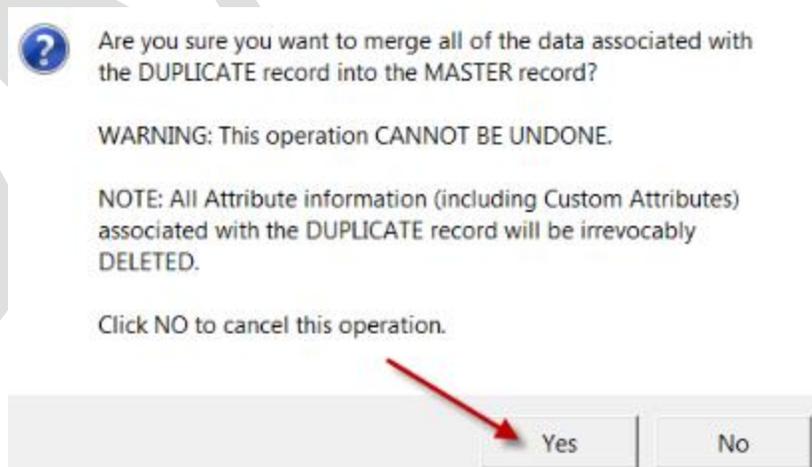
Select a Master record.

All historical information, such as touchpoint data, and program history, will be merged into one account.

Only the master record's *attribute* information will be retained after the merge is complete. Attribute data in the duplicated record will be irrevocably lost. Prior to conducting a merge, always ensure any attribute data from the duplicate record is recoded to the master record.

Once a master is selected, text will pop up indicating which record is master and which is duplicate. Click “Continue.”

Click “OK” on the warning box to dismiss the warning and merge the records.



## Query Wizard

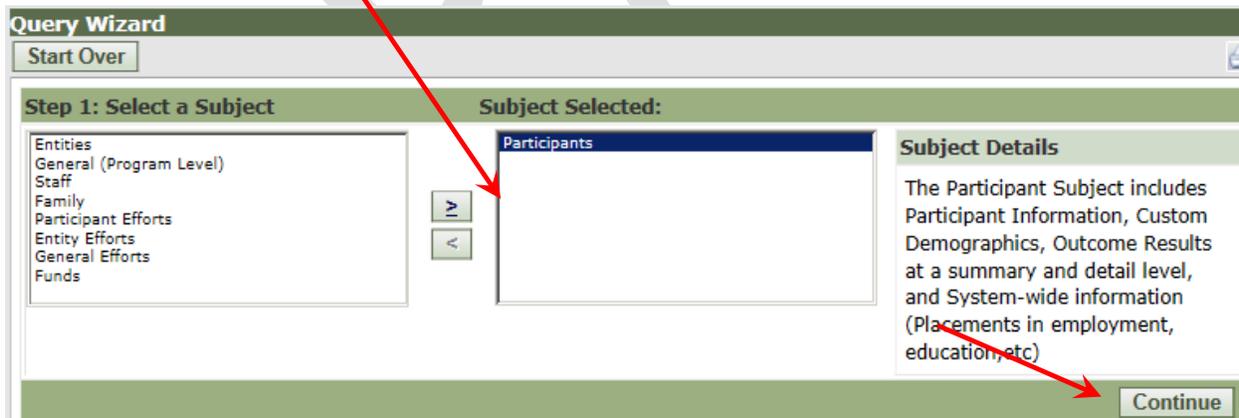
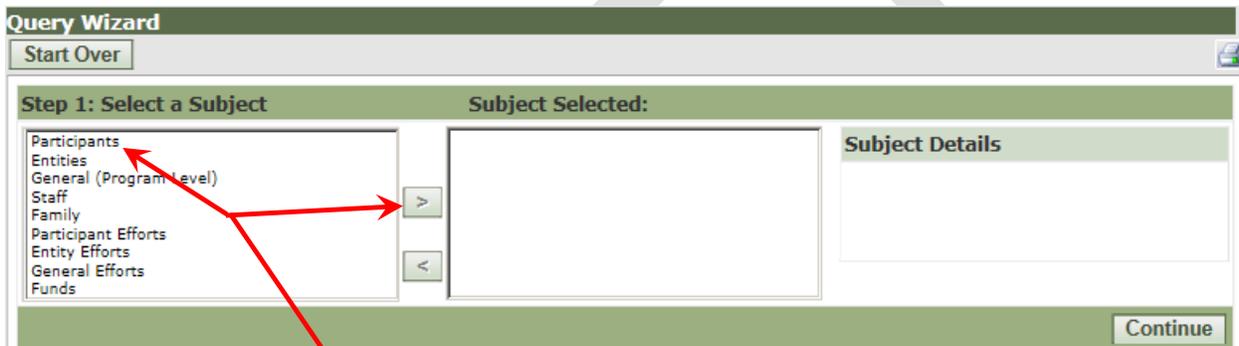
(Wizard → Query Wizard)

The Query Wizard is a tool to create a report of demographic data in Customer Management. (Unlike ETO Results, the Query Wizard cannot provide statistical analysis, comparisons or correlations.) Query Wizard is very fast, regardless of the number of records displayed.

A touchpoint batch upload requires the participant ID and SSN of each seeker. Query Wizard will allow fast retrieval of this information for a large number of seekers.

To obtain a report on seeker demographics, select Wizards from the Navigation Bar, then select Query Wizard.

Select Participants, and use the arrow to place participants in the middle section.



Click "Continue."

From next screen, follow same process, and move Participant Information and Active Program to the middle section. Click “Continue.”

**Query Wizard**  
Start Over

**Previous Steps**  
Step 1 (Subject Selected): Participants

**Step 2: Select a Focus Area**      **Focus Areas Selected:**

Processes Listed  
Participant Matches  
Participant Room Information  
Participant Room Hx Information  
Criminal Hx  
Custom Demographics By Name  
Participant Eligibility for Program  
Client Site  
Enterprise Criteria Clients  
Neighborhoods

Participant Information  
Active Program

**Focus Details**  
This focus area allows you to query participants who are currently **active** in a program. This means that the participant has not been dismissed from the program.

Check the box for each data point to be retrieved in the report:

To obtain the data needed for a touchpoint response batch upload, select at minimum:

- Participant Unique Identifier
- Participant First Name
- Participant Last Name
- SSN
- Program Name

**Query Wizard**  
Start Over

**Previous Steps**  
Step 1 (Subject Selected): Participants  
Step 2 (Focus Area Selected): Participant Information

**Step 3: Select Detail(s)**

Select/Description	Filter
<b>Focus Area: Participant Information</b>	
<input checked="" type="checkbox"/> Participant Unique Identifier	Turn Filter <b>ON</b> Filter Nulls <b>ON</b> Filter Advanced <b>ON</b>
<input type="checkbox"/> Prefix	Turn Filter <b>ON</b> Filter Nulls <b>ON</b> Filter Advanced <b>ON</b>
<input checked="" type="checkbox"/> Participant First Name	Turn Filter <b>ON</b> Filter Nulls <b>ON</b> Filter Advanced <b>ON</b>
<input type="checkbox"/> Participant Middle Initial	Turn Filter <b>ON</b> Filter Nulls <b>ON</b> Filter Advanced <b>ON</b>
<input checked="" type="checkbox"/> Participant Last Name	Turn Filter <b>ON</b> Filter Nulls <b>ON</b>

Click “Yes” to the confirmation message



The results will be displayed and can be viewed in Customer Management.

To view the report in **excel**, click “Download .csv file of Results” then click “Open.”

The image shows a "Query Wizard" interface. At the top, it says "Work with Data". Below this are several buttons: "Start Over", "Download .txt file of Results", "Download .csv file of Results", "Save Query", "Reset Grid", and "Requery". A red arrow points to the "Download .csv file of Results" button. Below the buttons are two rows of text: "Drag a column header here to group by that column" and "Drag a column header here to chart by that column". There is a "Chart selection" dropdown menu set to "Pre-selected chart mode (Bar)" and a "Chart" button. Below this is a "Query Results" section with a toolbar containing icons for search, print, and other actions. The toolbar shows "Page 1 of 69" and "Rows 1361". Below the toolbar is a table with the following data:

PARTICIPANT UNIQUE IDENTIFIER	PARTICIPANT FIRST NAME	PARTICIPANT LAST NAME	SSN	DATE OF BIRTH	PROGRAM START DATE	PROGRAM NAME
12737	Jtoah304	Ptah304	123456789			
12739	Test	Seeker	599359021	1/1/1980	5/27/2015	San Juan Career Center
12741	Bvron	Mukai	123456789	8/10/1988	5/12/2015	Sookane

The resulting excel file can be utilized as with any excel file. Filter columns for a particular office location if desired.

Use Query Wizard to obtain data needed for a batch upload. Copy / paste required data into the batch upload template.

	A	B	C	D	E
1	participant_unique_id	participant_first_name	participant_last_name	ssn	program_name
67	13062	Ryan	Abrams	5	Pacific Mountain WDC
75	14296	JOE	ABRAMS	5	Pacific Mountain WDC
573	13065	Yuri	Diculous	8	Pacific Mountain WDC
674	13070	Raymond	Douglas	4	Pacific Mountain WDC
790	13054	Fake	Fake	7	Pacific Mountain WDC
809	13056	JJevvec	Fake	6	Pacific Mountain WDC
818	13057	Fake2	Fake	8	Pacific Mountain WDC
850	13071	Marra	Fake	2	Pacific Mountain WDC
872	13216	PJevvec	Fake	8	Pacific Mountain WDC
968	13073	rory	gilmore	8	Pacific Mountain WDC
1049	13083	Georgana	Harley	4	Pacific Mountain WDC
1152	12840	Sapphire	Isaac	2	Pacific Mountain WDC
1203	13077	Jenny	Jenny	8	Pacific Mountain WDC
1222	13068	Brett	Jobs	5	Pacific Mountain WDC
1276	13087	Jayme	Kaniss	2	Pacific Mountain WDC

## Batch Upload

(Site Administration → Batch Upload)

For Batch Upload, the Customer Management WorkSource solution will utilize the **Touchpoint response** feature.

When uploading touchpoint responses, there are five fields that are necessary to include in the file in addition to any other required question from the touchpoint. The data for these five fields may be obtained from an ETO Results report, or a Query Wizard report.

1. Participant ID
2. First Name
3. Last Name
4. SSN
5. Site Name
6. Program (references office location)

### Batch Upload touchpoint responses:

**Step 1. Create a template for the batch upload.** Select “TouchPoint Responses” from the drop-down on the left and click “Continue.”

**Batch Upload**  
Step 1 of 4  
Create Template  
Select Template Type: TouchPoint Responses [v]  
Continue

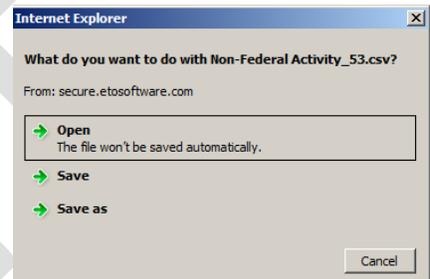
**Step 2. Select the name of the touchpoint**

**WORKSource**  
New Quick Search To Do List Messages My Favorites My Dash  
Enter Search Term(s) within Participant [v] in Pacific Mount  
Create Upload Template  
Select a TouchPoint: -- Select a TouchPoint --  
AFRS Batch Upload  
Application for TRA  
Basic Service  
Budget Calculator  
Case Note  
Confidential Case Note  
Contacts  
Cover Letter  
Customer Satisfaction Survey (Employer)  
Customer Satisfaction Survey (Participant...)  
Daily Aggregated Anonymous Job Searches  
Daily Aggregated Anonymous Job Views  
Daily Aggregated Jobs Count  
Demographic Details  
Disability Details  
Education for Resume  
Employer Contact  
Employer Notes  
Employer Service  
Employment History  
Employment History (Non Participant Data...)  
ETO Engage Effort  
Event  
Event Attendance  
Event Registration  
Exit, Exclusion  
Experience for Resume  
First WIOA Activity (Supplemental)  
Follow-up

Leave the top button selected and click “Generate Template.”

Click Open when the prompt appears. This will open the template.

In addition to the required columns, a column will be created for each question in the touchpoint. The numbers appended to the right of the question should not be altered.



**Step 3.** Enter data into the five required columns. Data can be obtained from an ETO Results report or Query Wizard.

Other non-question columns:

Response Date: Date of contact.

Update or Insert:  
Enter “**Insert**” when creating new touchpoint responses.

Enter “**Update**” to edit touchpoint responses of a previously recorded touchpoint. (User must have edit permissions for the touchpoint and must have access to the office location). Response ID must be filled out for an update... this ID represents an ID of the exact touchpoint and must be included to complete the update. An ETO Results report can be run to obtain the response ID of a previously recorded touchpoint.

	A	B	C	D	E	F	G	H	I
1	Participant Identifier	FirstName	LastName	SSN	Site Name	Program Name	Response Date	Update or	Response ID
2	13075	Betty	Jones	3	4	WorkSource	Pacific Mountain WDC	8/26/2015	Insert
3	13080	Brantley	Seeker	3	4	WorkSource	Pacific Mountain WDC	8/26/2015	Insert
4	13087	Jayme	Kaniss	2	1	WorkSource	Pacific Mountain WDC	8/26/2015	Insert
5	14296	JOE	ABRAMS	5	2	WorkSource	Pacific Mountain WDC	8/26/2015	Insert

All remaining fields are the answers to each question in the touchpoint. Answers must be exactly as found on the touchpoint. Spelling, dashes, slashes, spaces, etc., must be exact. Any button or checkmark will be represented by a column. For example: Date of Next Contact - it is one question, however, there are many options to select. Every option would be represented by a column. Any question that is required in the touchpoint (an asterisk to the right of the question) must be included in the spreadsheet. Answers may be skipped for a non-required question.

Columns not needed, such as Response ID for an Insert, or a non-required question that will not be answered at this time, can be skipped, minimized or deleted.

**Step 4.** Once the data for the batch upload is captured on the file, save the file and note the file path where saved. The system will try to save the file as a .txt. Be sure to change to an excel file, e.g., .xls, or .xlsx

Back in the Customer Management software, click “Go Back” to exit the generate template feature.



**Step 5. Upload File:** Select “TouchPoint Response” from the type drop-down on right side, and browse for the file saved in step 4. Click Open when prompted, and then click “Continue.”

[Batch Upload Documentation](#)

**Upload File**

1. Select Type:  ▼

2. File:

**Step 6. Select the name of the touchpoint.** On same page, match fields. Review the two columns to make sure the file and Customer Management field names match. If not, select the correct field name from the drop-down box.

FirstName	<input type="text" value="FirstName (*)"/> ▼
MiddleInitial	<input type="text" value="MiddleInitial"/> ▼
LastName	<input type="text" value="LastName (*)"/> ▼
ProgramName	<input type="text" value="Program Name"/> ▼

If any data was “mismatched”, the fields will appear here. For example, if the touchpoint had the option to choose either Email or Phone, and in the spreadsheet the entry was “E-mail”, there would be a mismatch. Make corrections, and click “Continue.”

**Step 8.** Click “Finish.”

**Step 9.** If there are other files in queue, the batch upload may not complete immediately. Some batch uploads may take overnight. Once the file has successfully uploaded, a system email is sent to the user. On the Batch Upload page, a record of the upload action is displayed. Note if all of the records were accepted and confirm that the file went through by doing a quick search of the subjects who were included in the upload.

Take Action	File Name	Batch Upload Type	Records Received	Records Accepted	Records Not Inserted	Date
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Original File Uploaded File	New Participants1_8cb2ad1c31b044dc941b46efe520c6f0_20150321_175012	Participant	8	8	0	03/21/2015 05:50 PM
Original File Uploaded File	BatchUpload_9b9dc43b9aad49c5871dec5b8f1e3cf3_20150313_095557	Participant	2	2	0	03/13/2015 09:55 AM
Original File Uploaded File	New Participants_0393e8bb983c49eb8ffbaa5fa8cb1125_20150312_143123	Participant	8	8	0	03/12/2015 02:31 PM

If the batch upload errors, it will be noted in the File Name column. Records inserted successfully are complete. Any record that is noted as Record not inserted means those records will need to be corrected, and then re-uploaded.

It is recommended that a test batch upload be done first with 2-3 records. If successful, large batch uploads can then be processed. If not successful, research why and correct file before proceeding.

## Features Available to Staff Supervisors

### Review Staff To Do

(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.

### View Confidential Case Notes

The Confidential Case Notes touchpoint has been configured to allow Staff Supervisors to view recorded data. Locate recorded touchpoint for job seeker and click the “eye” icon to view.