This desk aid was developed to give guidance on some activities in ETO and is not intended to be a replacement for the user guide. Individual offices or areas may have different procedures. Please contact your local trainer or designated staff to determine if these guidelines are appropriate for your area.

**Entities, *Sub-*entities and recruiters**

In the customer management system, Efforts to Outcomes (ETO), employer records are called **Entities** and have three levels:

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



Employer Services can be documented under the *Sub-Entity* or *Recruiter* record. A best practice is to document *Employer Services* and *Employer Notes* under the *Sub-Entity*, not the *recruiter*. The benefits of documenting *Employer Services* in the *Sub-Entity* record are:

* Services are under a common record.
* Job postings display under the *Sub-Entity* record.

**Finding a *Sub-Entity***

You can find a *Sub-Entity* two ways. Either by record *Type* or by *Name.*

**Finding a *Sub-Entity* by type**

To find a *Sub-Entity* by type, use the navigation bar on the right side of the screen. Use the following steps:

1. Click the navigation bar arrow on the right side of the screen to display the menu.
2. Click *Entities*>Find *Employer by Type*
	* *Entity* Type: *Employer*
	* *Entity* Subtype: *Sub-Entity*
3. Click *Show Entities*
4. Type the company name in the *Entity Name* field.
5. Click the link of the correct company.
6. Click *Go to Dashboard* on the right hand side of the screen.

**Finding a *Sub-Entity* by name**

To find a *Sub-Entity* by name, use the navigation bar located at the right side of the screen.

1. Click the navigation bar arrow on the right side of the screen to display the menu.
2. Click *Entities* and *View Employer by Name*.
3. Type *Entity* name or *Employer ID number* in the search field.
4. Click *Search*.
5. Click the arrow by *Entity Name* to display the search results.



**Finding a *Sub-Entity* by Recruiter name:**

1. The company (*Sub-Entity*) name displays in the *Entity Information* section of the *Recruiter Dashboard* in the *Company Affiliation* field.
2. You can search by the name of the company (*Sub-Entity*) **or** the *Employer ID number*, displayed in parenthesis next to the *company name*.



**Recording Employer Services**

Once you’ve selected the correct *Sub-Entity* record, you can access *Employer Services TouchPoints* from the *View Employer Recruiter TouchPoints* widget on the Dashboard or from the *Most Recent Employer Services* on the Dashboard.

**Recording a service from View Employer/Recruiter TouchPoints widget**

1. Click the *View Employer/Recruiter TouchPoints* widget at the top of the dashboard.



1. Click “Take New TouchPoint.”



1. Select the “Employer Service” TouchPoint.



**Note:** If an Employer Service TouchPoint has already been recorded, you can click *Take New* next to the *Employer Service TouchPoint*.



**Recording a service from Most Recent Employer Services section on Dashboard**

1. Click *+ New* in the *Most Recent (20) Employer Services* section on the dashboard.



**Recording Employer Notes**

You can access *Employer Notes TouchPoint* from the *View Employer/Recruiter TouchPoint* widget or the *Most Recent Employer Services* section on the dashboard.

**Recording notes from View Employer/Recruiter TouchPoint widget**

1. Click the *View Employer/Recruiter TouchPoints* widget at the top of the dashboard.
2. Click *Take New TouchPoint*.
	1. If an *Employer Note* has already been recorded, you can click *Take New* next to the *Employer Notes*.



**Recording notes from Most Recent Employer Services section**

1. Click *+New* in the *Most Recent Employer Services* section on the dashboard.



**Finding Recruiters**

You can search for a list of all recruiter records associated with that *Sub-Entity*’s record. This is important if you need to access a recruiter’s *Job Match* account via impersonation.

1. Once you’ve selected the *Sub-Entity* record, click the *Find Recruiter Match* widget on the dashboard.



You can also search for the *Recruiter* record via the navigation bar using two methods: Find *Entity by Type* or *View Employer by Name*.

**Find *Entity* by Type**

1. Click on the Navigation bar on the right side of the screen.
2. Click *Entities*.
3. Click “*Find Entity by Type*.”
	* Entity Type: Employer
	* *Entity Subtype: Recruiter*
4. Click *Show Entities*
5. Type recruiter’s name in the *Entity Name* field.

**View Employer by Name**

1. Click on the Navigation bar on the right side of the screen.
2. Click *Entities*.
3. Click *View Employer by Name*.
4. Type the recruiter’s name in the *search field*
5. Click *Search*.
6. Click the arrow to display search results.



1. Click on the *recruiter’s* name.
2. Click *Go to Dashboard*.



**Additional Information**

* The [ETO User Guide](http://www.wa.gov/esd/wit/docs/CustomerManagementETOStaffGuide.pdf) outlines additional ETO functionality and features regarding employer records in Lesson 4: Working with Employers, pages 38-42.
	+ *Recording TouchPoints* (*Take New TouchPoint*) is outlined in Lesson 5: Using TouchPoints, pages 46-49.
* All employer demographics should be updated in the employer’s *Job Match* account.
* In order to access the employer’s *Job Match* (WorkSource WA) account, you must select a recruiter record in ETO.
* The *Quick Search* bar, located at the top of the screen, can be used to search for *Sub-Entities* and *Recruiters*. It is a “best practice” to use the search functionality via the navigation bar on the right side of the screen. The search parameters in the *Quick Search* bar are different. If you choose to use *Quick Search*, you can only search by:
	+ “*Sub-Entity* Name”;
	+ “*Recruiter Name*”; or
	+ “*Employer ID*”

Please note: You cannot search by “*Entity Type*.”