

Washington State State Program Policy

Policy Number: 7000 Revision 2

Policy Title: State Guidance and Instructions for the State Economic Security for All (EcSA) Program

Effective Date: July 1, 2025

1. Purpose:

To communicate guidance and instructions for the Economic Security for All (EcSA) program that is supported by State Funds and codified in state statute at RCW 43.164 (as distinct from federal EcSA funded by WIOA Title I Governor's statewide activities funds).

This revision reflects changes to program eligibility criteria arising as a result of the 2025-2027 biennial budget, which eliminated funding specifically allocated to the State EcSA People Experiencing Financial Need Program.

2. Background:

In the 2024 Legislative session, the Washington State legislature codified the State Economic Security for All program into law at RCW 43.164. In the 2025 Legislative session, the Legislature and Governor's office maintained the base funding to the State EcSA program of \$12.4 million over the biennium but opted to eliminate the additional funding that had been provided to serve individuals over 200% of the Federal Poverty Level, and to assist LWDBs with Business Services. Despite these reductions, the targeted populations of the EcSA program remained unchanged, which necessitates an adjustment of policy to provide guidance as to how to continue to serve participants while complying with all applicable regulations. This document has been amended to facilitate the allocation of these funds while providing that necessary guidance.

Note: To avoid ambiguity, programs funded by the Governor's WIOA statewide activities funds are called Federal EcSA, while those funded by state general funds are called State EcSA.

3. Policy:

a. Program Requirements

The priority of these funds is to accomplish the following goals:

1. Meet or exceed our local and statewide goals for the number of people moving to self-sufficiency, in order to demonstrate that EcSA is a successful model for

- moving people out of poverty with equity.
2. Bundle WIOA and non-WIOA services (Supplemental Nutrition Assistance Program, housing, many others) to stabilize customer's lives, conveniently and with dignity for the customer.
 3. Establish and implement customized career plans to reach 100% of participant self-sufficiency, as established by the UW Self-sufficiency Calculator.
 4. Provide extensive wrap-around services and continue bundling benefits to maintain stability as customers pursue their customized career plan, continuously until they reach Self-Sufficiency.
 5. Include Black, Indigenous, and People of Color communities, rural communities and people experiencing poverty in program design and implementation.
 6. Work collaboratively across local, state, and federal levels to remove barriers to coordinated delivery of multiple benefits.

The success of LWDBs and their sub-grantees in accomplishing these goals will be measured based on the following criteria:

- Reach target number of participants with income above their self-sufficiency goal. Notice this is **not an exit-based measure**; participants do not need to exit in order to be counted toward this measure, and LWDBs are encouraged to continue providing job retention services and other services to these individuals to ensure they remain permanently out of poverty.
- Reach target number of participants who exceed 200% of Federal Poverty Line.
- Reach target number of participants enrolled in training for a career with starting wages above their unique self-sufficiency goal.
- Reach target number of enrollments for individuals who meet eligibility requirements of the program.
- Measuring the proportion of EcSA participants who are BIPOC (Black, Indigenous, and People of Color), and/or unhoused/in rural communities, and working together to increase that proportion over time.

To properly measure accomplishment of these goals, LWDBs and sub-grantees are expected to comply with the following requirements:

- **Early Contract Performance:** The State Legislature has allocated these funds to serve more low-income families through local EcSA models. These funds have a one-year period of performance, and the legislature expects to see results in order to justify the continuation of this state funding allocation. LWDBs are expected to remain on-target to reach their contractual outcome targets over the course of the period of performance. The Grants Management Office (GMO) will carefully assess performance each quarter and will work collaboratively with LWDBs to redistribute funds to areas that are meeting or exceeding performance and spending targets.
- After enrollment into the program in accordance with State EcSA policy, all clients must be tracked in the ETO Case Management System according to the case management policies and procedures required by the WIOA Title I-B program.
- In addition to the above, clients must be assessed using the University of Washington (UW) Self-Sufficiency Calculator and their information stored in a manner that allows ESD and the designated contractor overseeing the

implementation of the self-sufficiency calculator to collect and record this data to assess performance and update the calculator at the time of exit to demonstrate whether the client has reached their self-sufficiency goal. Additionally, LWDBs must designate a local Point of Contact who will manage reporting on the use of the calculator and the data collected.

- For the purposes of all State EcSA programs, Self-Sufficiency is defined as Attainment of 100% of individualized household Self-Sufficiency, as established through use of the UW Self-Sufficiency Calculator.
- Every EcSA client must be provided information about other workforce, education, and human services that may be of value to them by using the Bundled Services Desk Aid provided by ESD or a local equivalent that has been approved by ESD.
- LWDBs must recruit in a manner that reaches out to BIPOC, and/or unhoused/in rural communities, with the intention of increasing the proportion of these populations that are served over time.
- LWDBs must work to identify examples of federal regulations that prevent better local coordination and report their findings to the Grants Management Office each year, for compilation and inclusion in ESD's annual report to the legislature and governor.
- LWDBs must work to ensure that equitable access to EcSA services is provided to people with disabilities.
- When possible, both parents in eligible two-parent households should be offered career development, English language learning, and other services, if desired by the family.
- LWDBs must collect feedback from people with lived experience of poverty and demonstrate that action has been taken to incorporate recommendations. They must also report quarterly on their local customer feedback and changes made to their local system based upon it, for compilation and inclusion in ESD's annual report to the legislature and governor.

b. Eligibility

To be eligible for **State EcSA**, applicants must meet the following requirements:

- Meet basic eligibility requirements for any of the three WIOA Title I-B formula programs, excluding requirements to register for Selective Service.
AND
 - Be from a household that is below 200% of the Federal Poverty Level per <https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines>
- OR
 - Be from a household above 200% of the Federal Poverty Level, but below their self-sufficiency goal as determined by the UW Self-Sufficiency Calculator AND
 - Require employment or training-related services to achieve self-sufficiency.

After 7/1/2025, no more than 20% of an LWDB's yearly enrollments may be from individuals who are over 200% of the Federal Poverty Level. Any enrollments entered prior to that date do not count toward the 20% limit.

One of the major goals of the State EcSA program is the promotion of a holistic approach to fighting poverty. For this reason, wherever possible other existing resources and programs should be used to maximize benefits to customers. **Note: Eligibility for the State EcSA program does not supplant eligibility criteria for any other program (e.g., WIOA Title I-B programs). LWDBs must ensure each**

participant meets the specific eligibility requirements prior to enrollment in each program.

c. Minimum Requirements for Documenting Eligibility

In order to demonstrate eligibility, LWDBs are required to maintain documentation that verifies the following:

- Identity
- U.S. Citizenship or otherwise legally entitled to work in the U.S.
- Age
- Income status

To better facilitate co-enrollment and local monitoring, the documents permitted to satisfy the above are the same as those designated by LWDB policy for the WIOA Title I-B program. If an LWDB does not have policy that designates acceptable documents, or wishes to use a different policy, it must consult the Grants Management Office for further guidance in creating one.

d. Allowable Uses of State EcSA Funding

- All services listed in the “State-Funded Services” tab of the WorkSource Services Catalog and commonly provided by WIOA Title I-B are automatically approved to be provided under State EcSA.
- The following services and activities not capable of being provided by WIOA Title I-B are allowable uses of State EcSA funds, once a local policy has been established concerning their provision and filed with the Grants Management Office:
 - Stipends/Participant Cash Support Payments
 - Food Assistance
 - Housing and Rental assistance
 - Medical and Mental Health Care including technology (eyeglasses, hearing aids, dental care etc.)
 - Marketing and Outreach
- For the purposes of State EcSA, a participant support payment is defined as the provision of cash or gift cards to a client in order to incentivize participation or assist in participation in programs established in the client’s individual employment plan. Items such as rental assistance or payments made on behalf of the client are supportive services and must be recorded and reported as such.
- In addition to the approved services and activities above, LWDBs may request additional allowable uses for local funds by submitting a request as outlined in [Attachment A](#).

e. Local State EcSA Policy Development

LWDBs are required to have local policies controlling the State EcSA program.

However, in order to facilitate service provision without requiring the creation of entirely new policies, LWDBs may designate that any aspects of the program not specifically cited in this document or other State EcSA guidance are controlled by the regulations set forth to govern the WIOA Title I-B program.

- If an LWDB decides to develop its own local policy beyond the regulations set forth

to govern the WIOA Title I-B program, it may do so by adopting the policy locally through the established local practice for policy approval and following the process outlined in Attachment A.

- State EcSA training and supportive services are not entitlements and must be provided on the basis of demonstrated need and individual circumstances, as documented in the client file.
- Locally developed State EcSA policies must outline an approach to utilize funds in a fair and equitable manner, including the definition of a reasonable cost cap by taking into consideration overall financial allotment, number of clients yet to be served, and individual client need.
- Provision of stipends or other cash support payments may cause additional requirements on sub-grantees or LWDBs concerning the provision of tax forms or have implications for other benefits a client receives (such as assistance from DSHS or other need-based payments). Because of this, it is recommended that LWDBs and sub-grantees understand their responsibilities and the implications of such services.

There may be circumstances under which participants have reached self-sufficiency but are not yet ready to be exited from the State EcSA program. In these situations, participants should be counted as a positive result as soon as possible but should not be exited from program until they are ready and have attained stability. Areas should consult the Grants Management Office to discuss potential options for tracking this measure.

f. Enrollment and ETO Guidance State/Services

- Enrollment, eligibility, services, and all other aspects of client progress must be recorded in State MIS (currently ETO). LWDBs and sub-grantees may use other means to record participation locally, but all information within them must also be located in ETO, or in designated paper files if LWDB policies allow their use.
 - If paper files are used, the service provider must maintain a file for State EcSA with all relevant information, separate from the files for any other program.
 - An Individual Employment Plan (IEP) must be established for every State EcSA enrollee, designed to help them move above 200% of the Federal Poverty Level and then above their Self-Sufficiency Standard,, whether below 200% of the FPL or above, and the details must be recorded in accordance with [Attachment B](#) of this document. If a client already has an Individual Employment Plan as a result of prior enrollment in a WIOA or Federal EcSA program, the IEP from the previous program may be used, but must be updated with the data from the UW Self-Sufficiency Calculator, and an explanation as to how the State EcSA program will be used to help the client reach self-sufficiency.
- LWDBs and their sub-grantees must enter client data into the designated UW Self-Sufficiency Calculator. Tracking of income information in other systems is acceptable for local purposes but does not replace this requirement.
- Individuals who are enrolled while their household income is over 200% of the Federal Poverty Line must be tracked in ETO in accordance with the guidance provided in [Attachment B](#) of this document.
- The amount and type of support services provided to clients must be tracked in ETO in accordance with the guidance provided by [Attachment B](#) of this

document.

- It is imperative that to the fullest extent possible that data entered into ETO accurately reflect the service provided at the time the service is provided. Therefore, the minimal ETO data entry requirements are as follows:
 - Services must be entered at the point in time that they are delivered. If services cannot be entered at the time they are delivered, State EcSA services must be entered within 14 calendar-days of service delivery, and the date entered must reflect the date the service was delivered. Subsequent edits to the services after the 14 calendar-day period to correct errors or further describe circumstances are acceptable.
 - Services entered after the 14 calendar-day restriction must be entered in accordance with the following process:
 - For any State EcSA service errors identified after the 14 calendar-day restriction, staff must correct the errors and request that the individual who has supervisory oversight over the program review and approve the correction. This approval must be documented with a case note. The case note must identify the service name, the reason for the correction, and the designated supervisor's review and approval of the correction.
 - Case Note Example: "The [enter service name, i.e.: Occupational Skills service that was provided on {date service occurred}] was not entered within the 14 calendar-day allowable timeframe per Policy 7000. As a designated supervisor, I reviewed and approved the late entry".
- See [Attachment B](#) for enrollment procedures.

g. Performance and Evaluation

The success of LWDBs and their sub-grantees in accomplishing these goals will be measured based on the following criteria:

- Reach target number of enrollments for individuals who meet eligibility requirements of the program.
- Reach target number of participants enrolled in training for a career with starting wages above their unique self-sufficiency goal.
- Reach target number of participants with employment income above their self-sufficiency goal.
- Reach target number of participants with employment income above 200% of Federal Poverty Line.
- Meet targets for expenditure of funding on the schedules set in the contract.
- Use the designated UW Self-Sufficiency Calculator and record the results at intake and upon reaching self-sufficiency or exit from program in accordance with the guidance provided. The recorded results may be updated as circumstances require.

To facilitate the tracking of these criteria, LWDBs will provide reports on a quarterly basis, with specific format as defined in local contracts executed between ESD and LWDBs.

For the purpose of tracking target enrollments in the State EcSA, there are two numbers that will be considered. First, the total number of enrollments. This is a straightforward counting of all individuals who are enrolled into the State EcSA program. The second is the total number of unique individuals enrolled across the State and Federal EcSA

programs.

Example: If an LWDB has a requirement for 30 Federal EcSA participants and 30 State EcSA participants, their requirement for general enrollment in State EcSA is 30, and their requirement for total unique individuals enrolled between the two programs is 60, regardless of whether individuals are co-enrolled in both State and Federal EcSA.

h. Monitoring

The State EcSA program will be monitored by the ESD Monitoring Unit, at a time and in a manner to be determined in consultation between the Grants Management Office, the ESD Monitoring Unit, and the LWDB to be monitored.

i. MOU and IFA Requirements

Per WorkSource System Policy 1013, Revision 4, One-Stop Memorandum of Understanding (MOU) and WorkSource System Policy 1024, Revision 2, Infrastructure Funding Agreements (IFA), State EcSA programs, if providing direct services through the one stop center(s) (AJCs), must sign the MOU and pay their proportionate share of IFA costs.

4. Definitions:

None.

5. References:

- [WorkSource System Policy 1013 Revision 4](#)– One-Stop Memorandum of Understanding
- [WorkSource System Policy 1024 Revision 2](#)– Infrastructure Funding Agreements and State Funding Mechanism
- [RCW Chapter 43.164](#)– Economic Security for All Grant Program

6. Supersedes:

WorkSource Information Notice (WIN) 129, Change 4, State Guidance and Instruction for the State Economic Security for All (EcSA) Program.
State Programs Policy 7000, Revision 1 - State Guidance and Instructions for the State Economic Security for All (EcSA) Program

7. Website:

[Workforce Professionals Center](#)

8. Action:

Local Workforce Development Boards and their contractors must distribute this policy broadly throughout the system to ensure that WorkSource System staff are familiar with its content and requirements.

9. Attachments:

[Attachment A](#) - Approval Procedure for Additional Elements

[Attachment B](#) - ETO Enrollment Procedures

[Attachment C](#) - Self-Sufficiency Calculator Step-By Step Guide

Direct Procedural Inquiries To:

Grants Management Office

Employment System Policy and Integrity Division

Employment Security Department

P.O. Box 9046

Olympia, WA 98507-9046

WorkforceInitiatives@esd.wa.gov

Direct Policy Inquiries To:

Employment System Administration and Policy

Employment System Policy and Integrity Division

Employment Security Department

P.O. Box 9046

Olympia, WA 98507-9046

SystemPolicy@esd.wa.gov

Attachment A

Approval Procedure for Additional Elements (GMO):

One of the major benefits offered by this funding is the opportunity to undertake activities that are not acceptable under federal statutes, regulations, and guidance. To that end, ESD will entertain any use of State EcSA funding that is consistent with the following goals:

1. Bundle WIOA and non-WIOA services (Supplemental Nutrition Assistance Program, housing, many others) to stabilize customer's lives, conveniently and with dignity for the customer.
2. Establish and implement customized career plans to reach 100% of participant Self-Sufficiency, as established by the UW Self-Sufficiency calculator.
3. Provide extensive wrap-around services and continue bundling benefits to maintain stability as customers pursue their customized career plan, continuously until they reach Self-Sufficiency.
4. Include Black, Indigenous, and People of Color communities, rural communities and people experiencing poverty in program design and implementation.
5. Work collaboratively across local, state, and federal levels to remove barriers to coordinated delivery of multiple benefits.

To facilitate innovation while ensuring that LWDBs remain within applicable requirements, the following process must be followed prior to using funds on any activities not already approved:

- *Step 1:* The LWDB consults with the Grants Management Office to discuss the parameters and feasibility of the proposed variance.
- *Step 2:* The LWDB submits a request answering the following questions:
 - An outline of the activity;
 - An explanation of how it will assist in serving clients and furthering the five priorities of the State EcSA program.
- *Step 3:* The Grants Management Office will assess the request, consult with appropriate subject matter experts, and then meet with the LWDB. The request will then either be approved, returned for further clarification or changes, or denied, with an initial response within five business days.
- *Step 4:* An official response will be provided per the request document within 14 calendar days.

Attachment B

Enrolling a Client in the State EcSA Program

First, ensure that the client has an account on worksourcewa.com.

- Several demographic fields can only be filled in by an account on worksourcewa.com, making a fully completed account vital.
- If a client is not in ETO, they do not have a fully completed account on worksourcewa.com.
- You can check a client's status by going to their dashboard and selecting "Access Seeker/Participant Account".



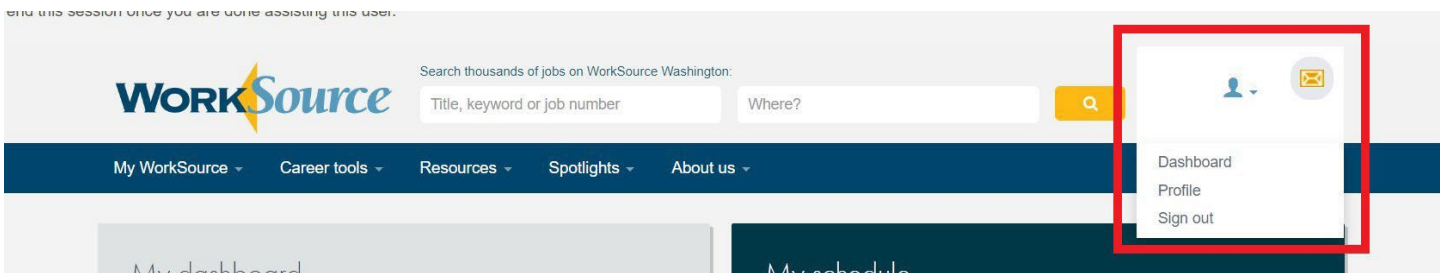
- If they do not have an account on worksourcewa.com, you will get the following message:

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

Details:

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

- If they do have an account, you will need to ensure that their profile is filled out fully. You can reach the profile by clicking on the person in the upper right corner of the page and clicking "profile." You then ensure that every field is filled. Some clients selected "no" on the question "would you like to be assessed for additional services;" if this is the case, you will need to change their answer to "yes" and fill in the answers, or else ETO will not have complete demographic information.



- Once you've ensured that their account is fully completed, you can begin the enrollment process. From the client dashboard, select "new" in the area titled "Most Recent Program Enrollments".

The screenshot shows the client dashboard for Gregor Samsa. It includes sections for Participant Information, General Information, Account Creation and Associated Activities, Most Recent (25) Basic Career Services, and Program Management Forms. The 'Most Recent (5) Program Enrollments' section is highlighted with a red box around the '+ New' button.

- Select "State-Funded Economic Security for All (EcSA)" from the dropdown and fill in all information requested including the question regarding whether the client is above 200% of the FPL, then save.
 - After completing this process, you must take a State EcSA service linked with the program with the same date as the enrollment. Consult your LWDB to determine the specific service to be taken.

Adding a Service

- To take a new touchpoint in the State EcSA program, first go to the client's ETO dashboard, and select "Review Seeker/Participant Touchpoints."

The screenshot shows Gregor Samsa's Dashboard. Under the 'Seekers/Participants' section, the 'Review Seeker/Participant Touchpoints' link is highlighted with a red box. Other links include Home, Case Notes History, Seeker Summary, and TAA Functions.

- From there, you select "Take New Touchpoint," at the bottom of the list of touchpoint names:

The screenshot shows the 'Review TouchPoints' page for Gregor Samsa. It lists various touchpoint categories like Basic Service, Objective Assessment (New), Program Enrollment, and State Funded Services, each with a 'Take New' link. At the bottom, the 'Take New TouchPoint' button is highlighted with a red box.

- From the dropdown list that this provides, you select “State Funded Services

The screenshot shows a web form titled "Record TouchPoint". Below the title is a label "Select TouchPoint:" followed by a dropdown menu. The dropdown menu is open, displaying a list of service categories. The category "State Funded Services" is highlighted with a mouse cursor. Other visible categories include "Individualized Training and Supportive Services (ITSS)", "Licenses and Endorsements", "MSFW Details", "MSG Tests and Results Replicated (Joanie)", "Non WIOA/TAA Application Status", "Objective Assessment (New)", "Obligations", "Outcomes, Program Completion", "Program Enrollment", "RESEA Action Plan Initial", "RESEA Appointment_Joanie", "RESEA Required Elements Initial", "TAA Enrollment Packet", "TAA Training Forms", "TAA Waiver", "Tests and Results", "Uploaded Files", "Veteran Details", and "WIOA Eligibility Application".

- Select the date the service was provided. Then, using the State-Funded services tab in the WorkSource Services Catalog, determine the proper service, and select it from the dropdown list. Then, fill out the touchpoint, making sure to fill all fields provided and add a case note.

The screenshot shows the "First Page" of a form. At the top, there are two date selection fields: "Start Date *" with the value "6/13/2022" and "End Date *" with the placeholder "mm/dd/yyyy". Below these is a "Service *" dropdown menu. The dropdown menu is open, showing a list of services categorized under "Basic" and "Individualized". The "Basic" category includes "State EcSA Basic Assessment", "State EcSA Career Guidance Services", "State EcSA Deskside Job Seeker Assistance", "State EcSA Employment Referral", "State EcSA Job Development", "State EcSA Miscellaneous Workshop", "State EcSA Provided Workforce Information", "State EcSA Referral to Additional Services", and "State EcSA Resume Review". The "Individualized" category includes "State EcSA Career and Vocational Counseling", "State EcSA Comprehensive and Specialized Assessment", "State EcSA Development of Individual Employment Plans", "State EcSA Mentorship Opportunity", "State EcSA One-to-One Mentoring", "State EcSA Financial Literacy", "State EcSA Short-Term Pre-Vocational Services", and "State EcSA Work/Internship Experience".

Tracking State EcSA Supportive Services

- To fulfill new state requirements, Supportive Services provided for childcare, housing, auto repair, and transportation must be tracked. To facilitate this, additional options have been added to State Funded Support Service touchpoints in ETO.
 - To track childcare, housing, or automotive repair, you will select the option in question from the new dropdown field in the touchpoint.

Type of Resource Provided *

-- Select --

Childcare
Housing
Automotive repair
Other

Type of Resource Provided: This question requires an answer.

Company or Agency Providing Resource

- After selecting this option, you will enter the amount provided for the service. The touchpoint is otherwise unchanged.
- If the service does not fit into any of the options, select “Other” and you will be given the following options. You will then fill them out accordingly.

Type of Resource Provided *

Other

If Other, List Resource Here *

Amount *

\$

Note: Transportation support is tracked by the corresponding touchpoint, rather than a dropdown option.

How to Track an EcSA Career Plan

- In order to complete a State EcSA enrollment in the system, a service marking the completion of the career plan and UW Self-Sufficiency Calculator must be entered. In order to streamline processes and avoid errors, the service to be taken for State EcSA is “State Funded Development of Individual Employment Plan.”
 - The career plan must be complete, and service entered within 30 calendar days of the enrollment. It must also reference the completion of the Bundled Services Desk Aid, including any resources to which the client was referred.
- This service will also serve as the location where the State EcSA Career Plan is to be located.

- If the client already has a career plan as a result of a prior, ongoing program enrollment, the bulk of the plan may be located in other parts of ETO, but the Development of Individual Employment Plan must include any EcSA-specific elements of the enrollment, such as information concerning the UW Self-Sufficiency Calculator results, and how the results relate to the larger career plan.

Program Completing a Participant

- Create new *Outcome, Program Completion* TouchPoint.
- Select State-Funded Economic Security for All (EcSA) from active program enrollment dropdown menu.
- Complete *Outcome, Program Completion* TouchPoint data elements as appropriate for the participant:
 - Identify whether they are “employed at outcome”.
 - Enter annualized wages.

ETO Reports

General Tips:

- The system pulls automated reports for RESEA and other programs on Monday. Because of this, waiting until later in the week can save time and effort.
- The first time you pull a report, you may need to turn off pop-up blockers for the site.
- ETO reports will eventually time out if the data selected takes too long to collect; if it extends past that time period, it will provide whatever information it has.
 - The system will provide you whatever information it has pulled as of the timeout. Please note that this may not be all the data that is available from the period requested. For this reason, multiple report pulls for especially long date ranges are therefore recommended.

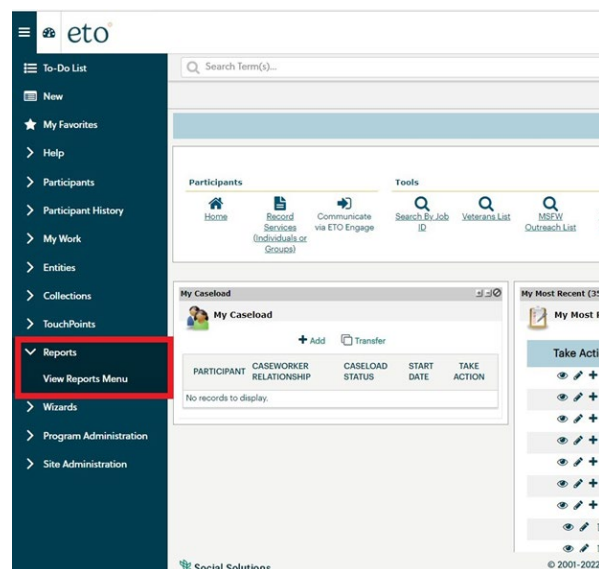
Suggested Reports:

To assist with tracking case management and service provision, the following ETO reports are recommended:

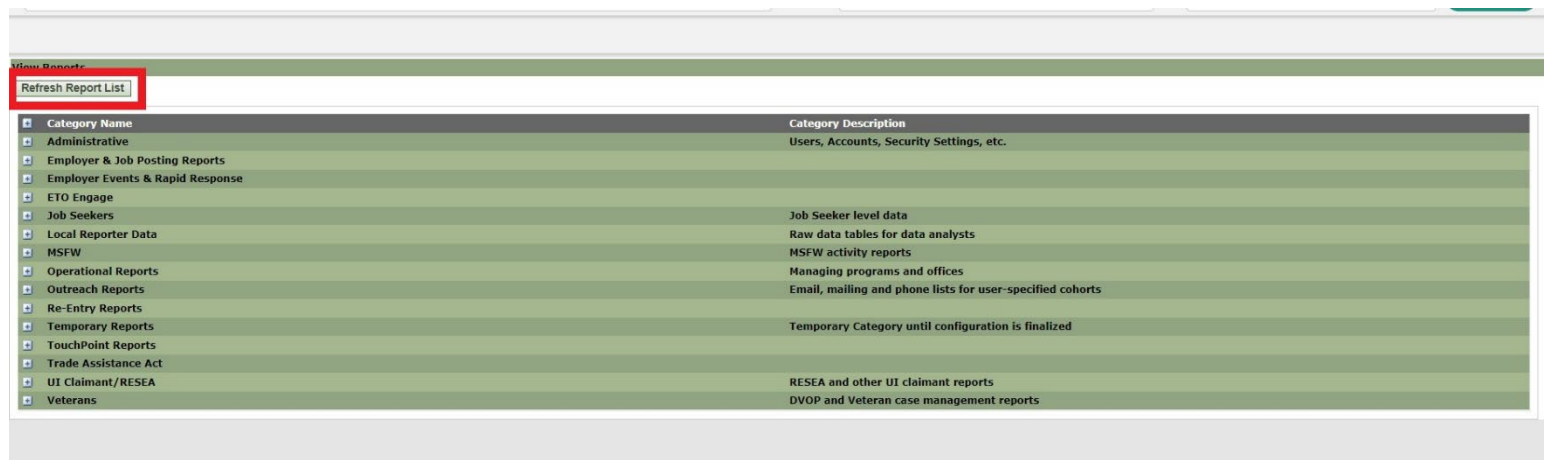
- Program Enrollments Report Without Demo Details
- Outcomes Touchpoints With Employment Start Date Information
- Case Management Report without Demographic Details
- Local Reporter Data Optimized
- Create a Record in ETO

Getting Started

- The reports menu is in the user control panel on the left side of the page.
- Select the three bars, then choose “Reports” from the dropdown menu.



- Always start by refreshing the Reports List



Select Report:

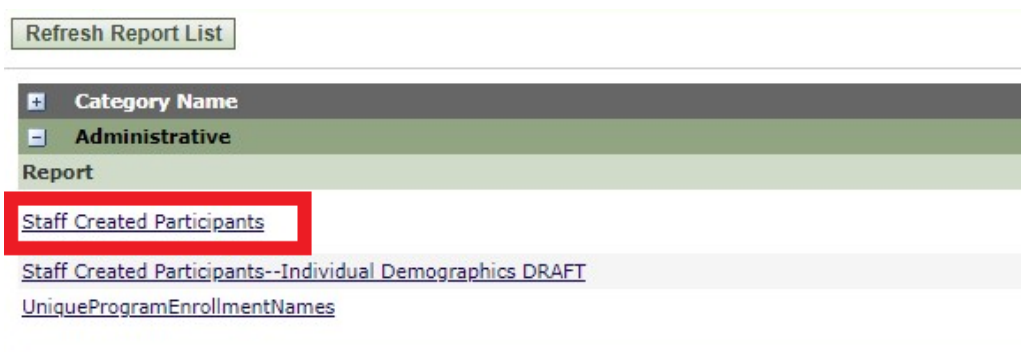
- The reports previously mentioned are in different sub-categories:
 - Local Reporter Data
 - Local Reporter Services Report OPTIMIZED
 - Program Enrollment Outcomes



- Operational Reports
 - Outcomes Touchpoints With Employment Start Date Information
 - Program Enrollment Report With Demographic Details



- Administrative Report
 - Staff Created Participants



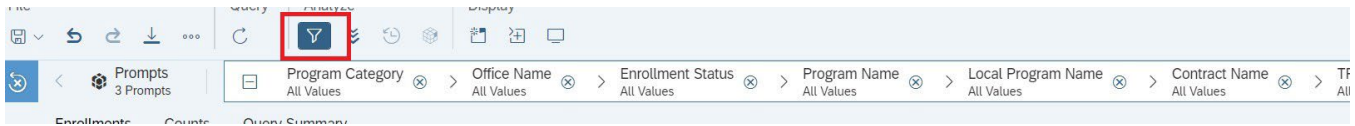
Selecting Data:

- Select dates and areas from which to collect information.
- Remember, the more you select for time and area, the longer the report takes to populate

The screenshot displays a data selection interface. On the left, there are prompts for 'Enter value(s) for WDA Name:', 'Begin Date', and 'End Date'. On the right, under the 'Program Group Name' section, a list of locations is shown with checkboxes: Central Office, WDA 01 - Olympic, WDA 02 - Pacific Mountain, WDA 03 - Northwest, WDA 04 - Snohomish, WDA 05 - Seattle-King County, and WDA 06 - Tacoma-Pierce.

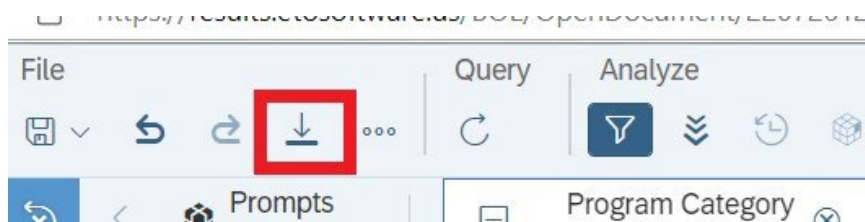
Navigating the Report

- The Filter Bar can be used to sort data before export.
 - You may not have this by default; to bring it up, click “Filter Bar” on the toolbar at the top.
 - Select the information you wish to see by clicking on the options on the bar below.



Exporting to Excel

- Select the export button from the taskbar, shown below.



- Choose the format you prefer.
- The file will be automatically saved in your downloads folder if you're using Edge.
- If you're using Chrome, it will not automatically save, and you will need to save it before closing.
- Note: Chrome can sometimes cause issues with ETO, so if you have difficulty while using it, try using Edge.



Self-Sufficiency Calculator Step-By-Step Guide to Saving Customer Information

The following is a step-by-step guide to saving customer information in the UW Self-Sufficiency Calculator.

STEP #1: FIND THE SELF-SUFFICIENCY CALCULATOR ON THE INTERNET

Go to www.thecalculator.org.

STEP #2: LOG IN TO THE CALCULATOR AS A CASEWORKER

On the main page for the Self-Sufficiency Calculator, click on the button at the bottom left of the screen: “Case Manager Log In click here.” On the case manager page, enter your ID & password and click on the “Login” button. Once you have logged in you can register a new customer, search for or list customers, edit registration data, or enter exit data.

*(Your manager will give you a Case Manager ID and Password. If you do not have those, please see your manager.)

Registering a new ECSA customer

STEP #3: REGISTER A NEW CUSTOMER

Click on “Register New Client.” This refers to the date that you create a self-sufficiency calculator record for your customer, to allow you to capture “pre” and “post” wage data. Selecting this option will take you to the Personal Info page.

STEP #4: COMPLETE INFORMATION ON THE CUSTOMER INFORMATION PAGE

Answer each of the questions on the Personal Info page for your new ECSA customer. Required fields have a red asterisk and you must complete those in order to proceed to the calculator.

STEP #5: PROCEED TO THE CALCULATOR

After you’ve completed the Personal Info Page, click the “Continue to Calculator” button at the bottom of the screen.

STEP #6: ENTER CUSTOMER DATA

Enter your customer’s data on the Wages/ Income and Expenses pages. You can navigate easily through the pages using either the tabs at the top of the page or the “Next” button at the bottom of each page.

STEP #7: REVIEW CUSTOMER DATA

Go to the Review page to double-check the information you have entered. Click on any of the blue “edit” buttons to make necessary changes. Once you have reviewed the information, click on the “Move to Final Report” button.

STEP #8: SAVE INFORMATION

From the drop-down menu at the bottom of the Final Report page, select "Print this page," click on the "GO" button and print the report for your file. Then select "Save registration data & exit calculator" and click on the "GO" button.

Editing customer registration data

STEP #1: LOCATE CUSTOMER RECORD

After logging-in as a case manager, use the client search field to locate the customer's record (you can search by first name, client ID, or ETO ID).

STEP #2: EDIT RECORD

Once you have located the record, click on "edit record" and use the tabs to get to the appropriate page(s) to edit registration data.

STEP #3: SAVE INFORMATION

Once you have made the necessary changes to customer registration data, go to the Final Report page. From the drop-down menu at the bottom of the page, select "Print this page," click on the "GO" button, and print the report for your file. Then select "Save registration data & exit calculator" and click on the "GO" button. *Please Note: registration data should reflect customer information at the time of registration; only make edits if you find that the information initially entered was incorrect at the time.*

Exiting an ECSA registered customer

STEP #1: EXIT A CUSTOMER

The "exit" function is intended to capture the wage data when your customer secures employment as a result of participating in the EcSA program. After logging in as a case manager, use the client search field to locate the customer's record (you can search by first name, client ID, or ETO ID).

STEP #2: ENTER CUSTOMER DATA

Once you have arrived at the Personal Info page, work through each of the pages entering income and expense information as you did at registration. (Note: the data you entered at registration will appear on these pages at exit. Edit as needed and leave data that is still current at exit.)

STEP #3: REVIEW CUSTOMER DATA

Go to the Review page to double-check the information you have entered. Click on any of the blue "edit" buttons to make necessary changes. Once you have reviewed the information, click on the "Move to Final Report" button.

STEP #4: SAVE INFORMATION

From the drop-down menu at the bottom of the Final Report page, select "Print this page" and click on the "GO" button and print the report for your file. Then select "Save exit data & exit calculator" and click on the "GO" button.