

Customer Flow Tracker Procedures

For External Users

Note: External Users is defined as anyone accessing the Customer Flow Tracker (CFT) that does not have an ESD email address.

All external CFT users must have a Smartsheet Account

Create an account online here → <https://www.smartsheet.com/customers-home>

Smartsheet accounts are FREE. If you are prompted to request a license, always ignore the request. A license is not needed to view/update resources in the CFT.

To get started, open both ETO and Customer Flow Tracker (CFT) using the CFT Process Steps below.

Locate customer in ETO and ask the standard questions (VET, MSFW). If you can't locate them in ETO, encourage them to create an account. You will still count the service in the CFT.

CFT Process Steps:

1. Navigate to the Partner Dashboard resource tool:

<https://app.smartsheet.com/b/publish?EQBCT=138ceeac9b9040f89a57a208b88c41ec>

- A link to the tool is also found on the Workforce Professionals Center - Customer flow tracker webpage: <https://wpc.wa.gov/reports/customer-flow-tracker>

2. Upon accessing the link, you will see the Customer Flow Tracker 2.0 Dashboard:

Customer Flow Tracker (CFT) 2.0

IMPORTANT! The resources provided on this dashboard are for users without an @esd.wa.gov email address.

To submit entries, select the entry form link from the lists below:

Central Region

- [Central Basin](#)
- [Columbia Gorge](#)
- [Goldendale](#)
- [Kittitas](#)
- [Okanogan](#)
- [Sunnyside](#)
- [Toppenish](#)
- [Wenatchee](#)

Central Sound Region

- [American Lake](#)
- [Auburn](#)
- [JBLM](#)
- [North Seattle](#)
- [Pierce](#)
- [Rainier](#)

Eastern Region

- [Clarkston](#)
- [Columbia Basin](#)
- [Colville](#)
- [Pullman](#)
- [Spokane](#)
- [Walla Walla](#)

North Sound Region

- [Clallam/Jefferson](#)
- [Everett](#)
- [Island](#)
- [Kitsap](#)
- [Skagit](#)
- [Whatcom](#)

SW Coastal Region

- [Cowlitz/Wahkiakum](#)
- [Grays Harbor/Long Beach](#)
- [Lewis](#)
- [Mason](#)
- [Thurston](#)
- [Vancouver](#)

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3. Upon accessing the link, the WorkApp will open to the Customer Flow Entry form.
 - To make entries when supporting another location, use the Customer Flow 'All Region' entry form, also located in the WorkApp (black background).
 - Leadership and Leadership support designees will only see the 'All Region' entry form.

Customer Flow Entry Form 2.0 Island

This form captures in person traffic connected to our staff-assisted services. It includes date, time, and location connected to the person making the entry.

Please note:

- Entries are more valuable when made in real time.
- Customers will only be added once a day.
- Virtual services (phone/video) and in person services provided at non-WorkSource locations are not documented using this form.

Who was the in person service delivered to? *

Job seeker (individual)
 Job seeker (group)
 Employer

Was this persons last employer the Federal Government?
 <-- If yes, check this box.

Reason for visit?

(select all that apply) *

Use WorkSource resources
 One on one assistance
 Unemployment Insurance claim assistance
 Receive information about WA Cares or Paid Family Medical Leave

Enter the ETO ID number
This field cannot be used for any other data/information.

If the service / visit was not entered at the time provided (real time)..
 <--- Check this flag to complete the entry

Local Notes
DO NOT include customers personal identifiers (PII)

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For Job Seeker (individual) Entries

If the customer's last employer was the Federal Government, check the box.

Enter the reason for visit. Once a selection is made, the definition is also provided.

Who was the in person service delivered to? *

- Job seeker (individual)
- Job seeker (group)
- Employer

Was this person's last employer the Federal Government?

<-- If yes, check this box.

Reason for visit?

(select all that apply) *

- Use WorkSource resources
- One on one assistance
- Unemployment Insurance claim assistance
- Receive information about WA Cares or Paid Family Medical Leave

Use WorkSource Resources (defined):

Includes resource room computers, public phone, printer, or fax. Use this category for customers receiving staff assistance in the resource room.

One on one assistance (defined):

Use this category for customers receiving desk side assistance, including desk-side walk ins and program-related appointments. Examples include but are not limited to: RESEA, DVOP, WorkFirst, TAA, WIOA Title 1, and appointments with local partners.

Unemployment Insurance claim assistance (defined):

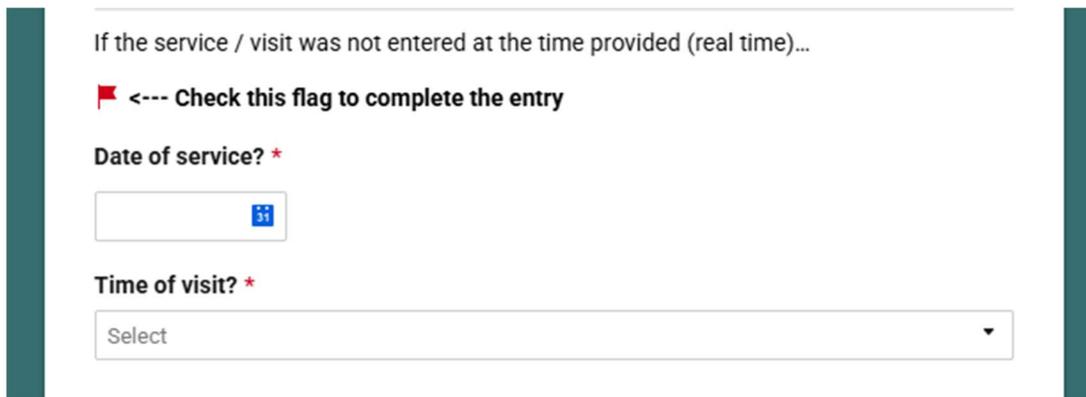
Use this category when the customer needs assistance related to their UI claim. Examples include but are not limited to: faxing documents to UI, assisting with eServices, using the bypass phone, claims questions/issues, 1099s, identity verification and other services provided by the UI division. Do not record RESEA services here unless the claimant also needs claim assistance.

Receive information about WA Cares or Paid Family Medical Leave (defined):

Use this category when the customer needs assistance related to WA Cares or Paid Family Medical Leave. Examples include but are not limited to: contacting PFML, setting up a SAW account, resetting passwords, printing forms, navigating the online application, scanning documents to their email so they upload to the application, and other services provided by the Leave and Care division.

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Individual entries should be made in real time. If that is not possible, select “Check this flag...” and enter the information to indicate date and time range of visit.



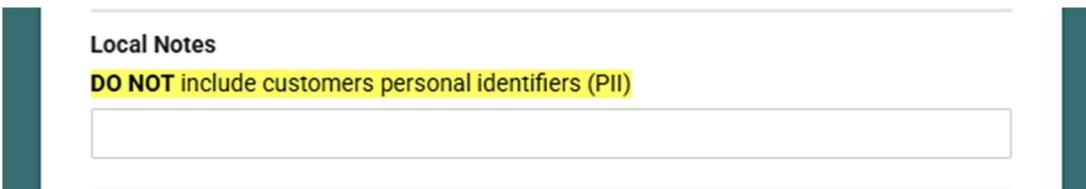
If the service / visit was not entered at the time provided (real time)...

 <--- Check this flag to complete the entry

Date of service? *

Time of visit? *

Local notes are not collected in statewide data reports. However, if your office chooses to use this feature for local records, please ensure Personally Identifiable Information is not included.



Local Notes

DO NOT include customers personal identifiers (PII)

Once the form is complete, select “Submit” and a new form will immediately populate.

Send me a copy of my responses



Customer Flow Tracker Procedures For External Users

For Job Seeker (group) Entries

Enter the total number of customers in the group.

Enter the number of customers in the group that identified their last employer as the Federal Govt.

The screenshot shows a form with the following fields and options:

- Who was the in person service delivered to? ***
 - Job seeker (individual)
 - Job seeker (group)
 - Employer
- # of people in the Group? ***
Input field: 10
- How many people in this group identified their last employer as the Federal Government? ***
Input field: 5

An example callout box on the right contains the following text:

Example:
There are 10 customers in the group, 5 of which identified their last employer being the Federal Government.

- 10 customers
- 5 last employed by Fed Govt

Enter the reason for visit. Once a selection is made, the definition is also provided.

Best Practice: Choose a simple format for consistency – “Resume Workshop 1:00 to 3:00.”

Best Practice: The team member responsible for entering the group service and crediting attendance in ETO will also complete the CFT entry.

The screenshot shows a form with the following fields and options:

- Reason for visit?**
- The type of event will be selected based on how it was advertised. ***
Ex: Hiring events often include resource information but will be tracked as hiring events only.
- (select one)
 - Hiring event
 - Resource Fair
 - Workshop/Seminar
- Name of event? ***
Note: Type your entry, then use tab or enter to move to the next field.
Input field: [Empty]
- Hiring event (defined):**
Use this category for job fairs or other hiring events focused on connecting job seekers with employers.

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For Employer Entries

Enter the reason for visit. Once a selection is made, the definition is also provided.

Best Practice: Choose a simple format for consistency – “Job Fair 1:00 to 3:00.”

Best Practice: The team member responsible for entering the employer service in ETO will also complete the CFT entry.

Who was the in person service delivered to? *

- Job seeker (individual)
- Job seeker (group)
- Employer

Reason for visit?

(select one) *

- Job fair
- Hiring event
- Interviews
- Onboarding
- One on one assistance
- Training

Job fair (defined):
An event held at a WorkSource office to support recruitment for multiple employers.

Once the form is complete, select “Submit” and a new form will immediately populate.

Send me a copy of my responses

