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

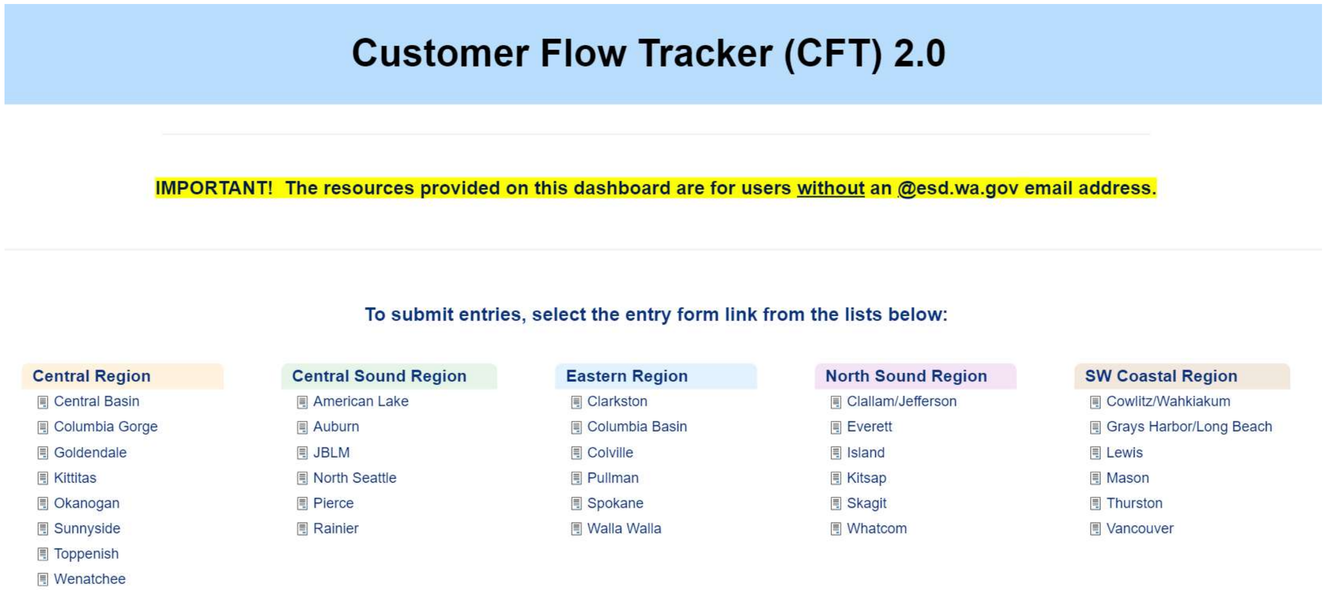
Smartsheet accounts are FREE. If you are prompted to request a license, always ignore the request. A license is not needed to view/update resources in the CFT.

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:



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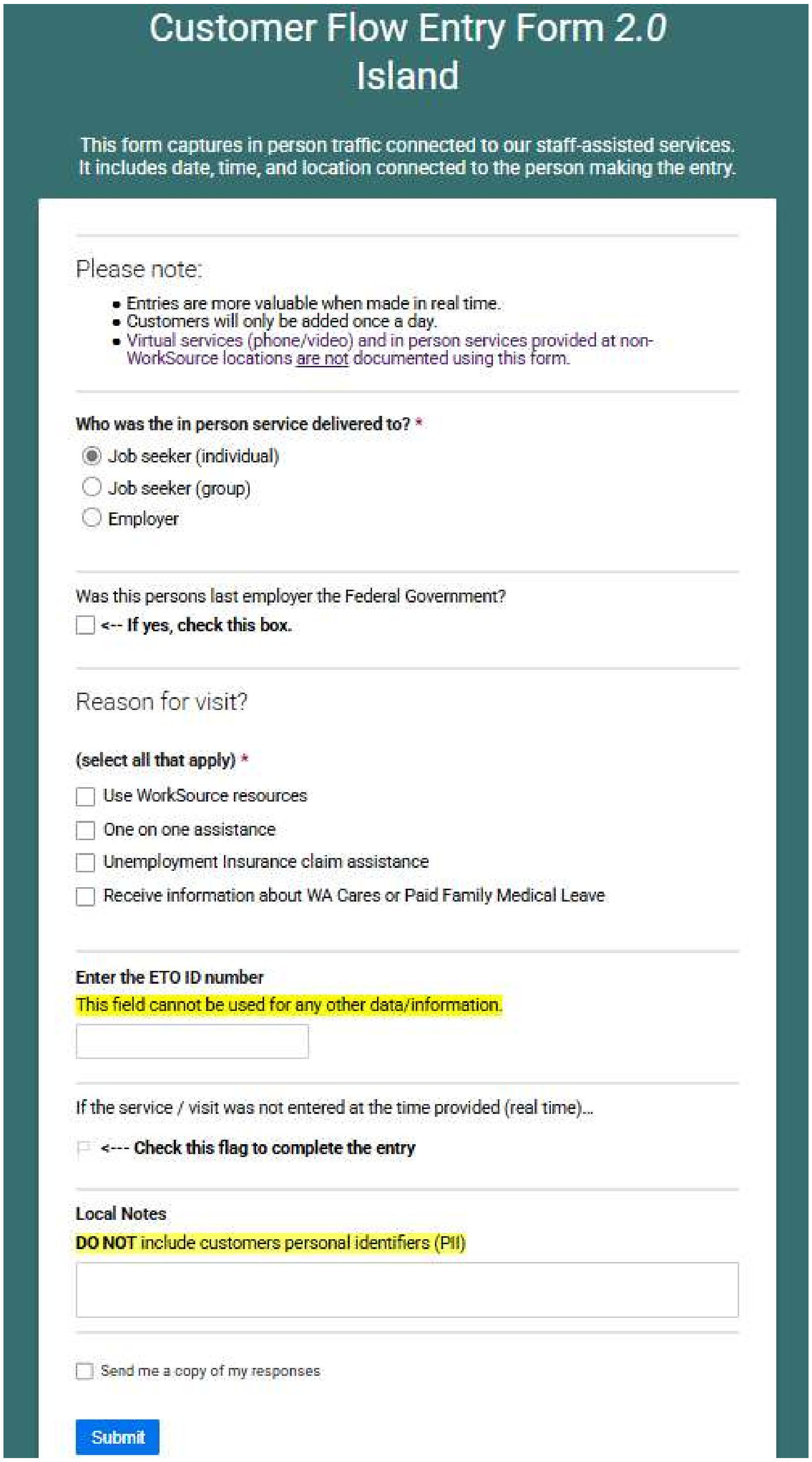
3. Upon accessing the link, the WorkApp will open to the Customer Flow Entry form.
    - To make entries when supporting another location, use the Customer Flow ‘All Region’ entry form, also located in the WorkApp (black background).
    - Leadership and Leadership support designees will only see the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

- (x) 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)

- [ ] Send me a copy of my responses

Submit

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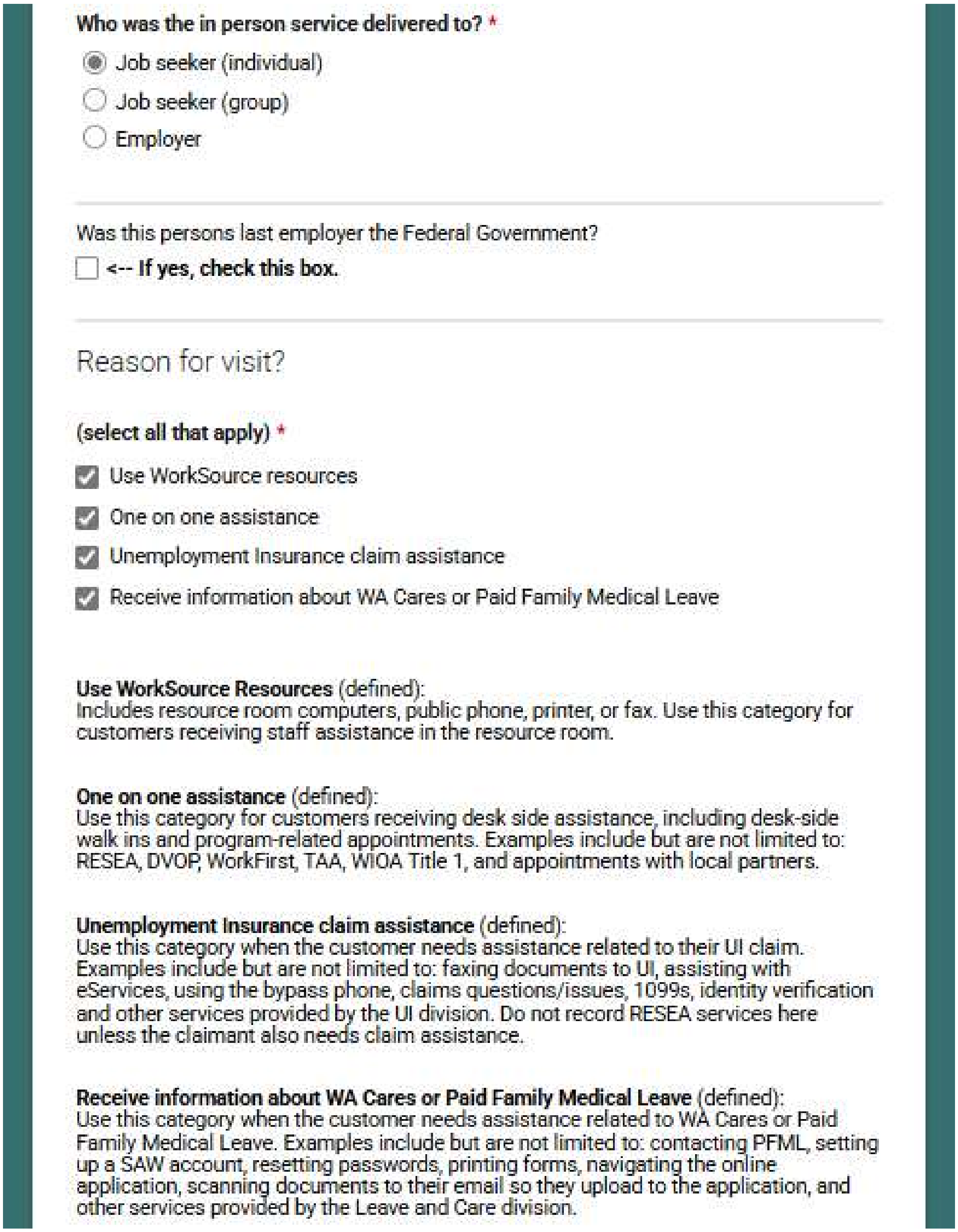
For Job Seeker (individual) Entries

If the customers 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 persons last employer the Federal Government?

- [ ] **<-- If yes, check this box.**

Reason for visit?

(select all that apply) *

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

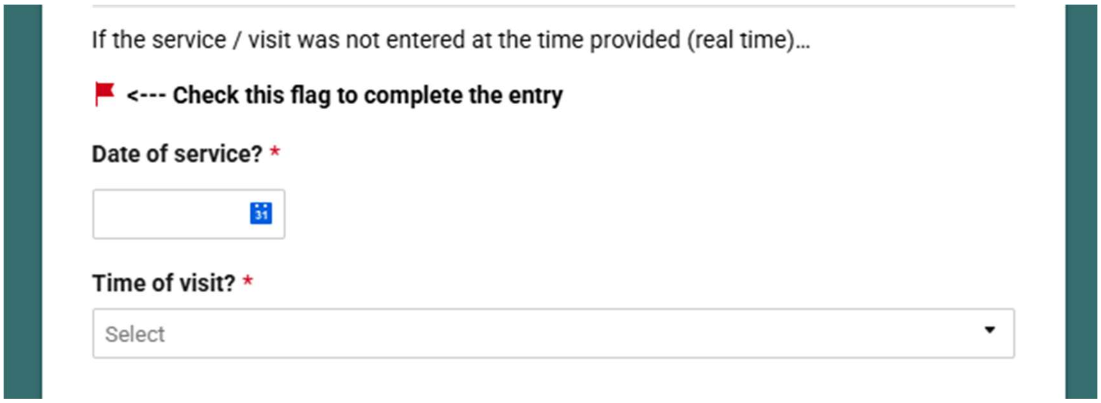
Use WorkSource Resources (defined):
Includes resource room computers, public phone, printer, or fax. Use this category for customers receiving staff assistance in the resource room.

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.

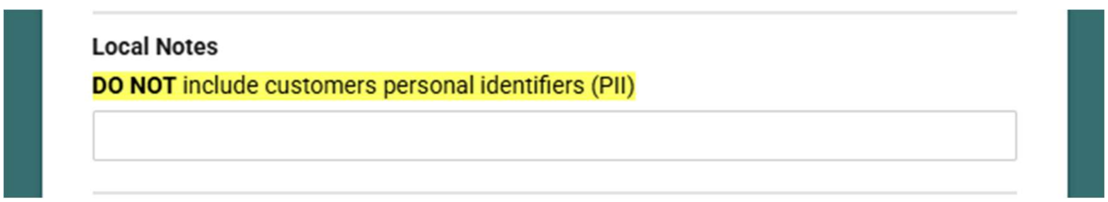
Unemployment Insurance claim assistance (defined):
Use this category when the customer needs assistance related to their UI claim. Examples include but are not limited to: faxing documents to UI, assisting with eServices, using the bypass phone, claims questions/issues, 1099s, identity verification and 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.

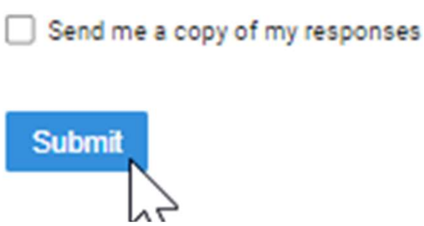
Individual entries should be made in real time. If that is not possible, select “Check this flag…” and enter the information to indicate date and time range of visit.



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.



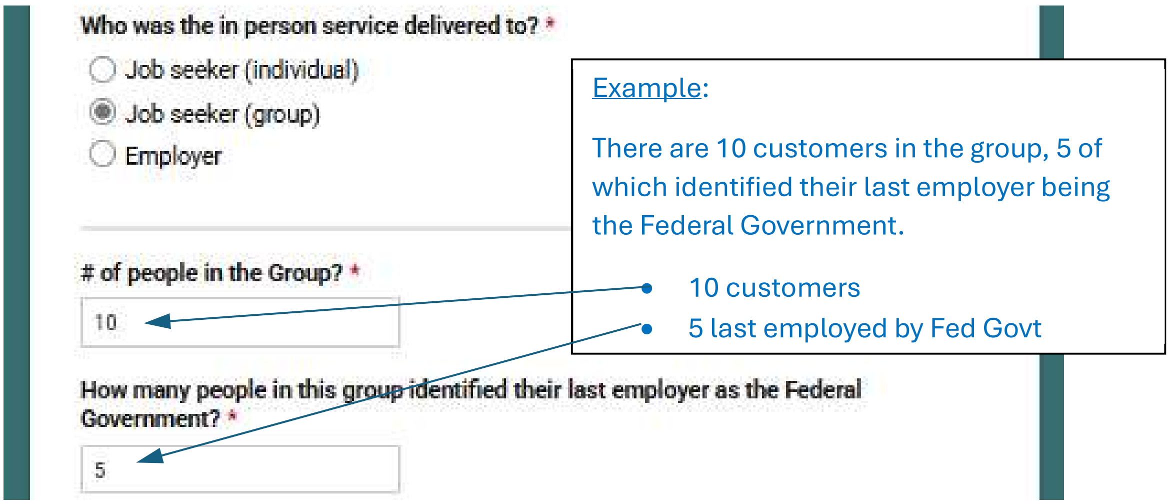
Once the form is complete, select “Submit” and a new form will immediately populate.



For Job Seeker (group) Entries

Enter the total number of customers in the group.

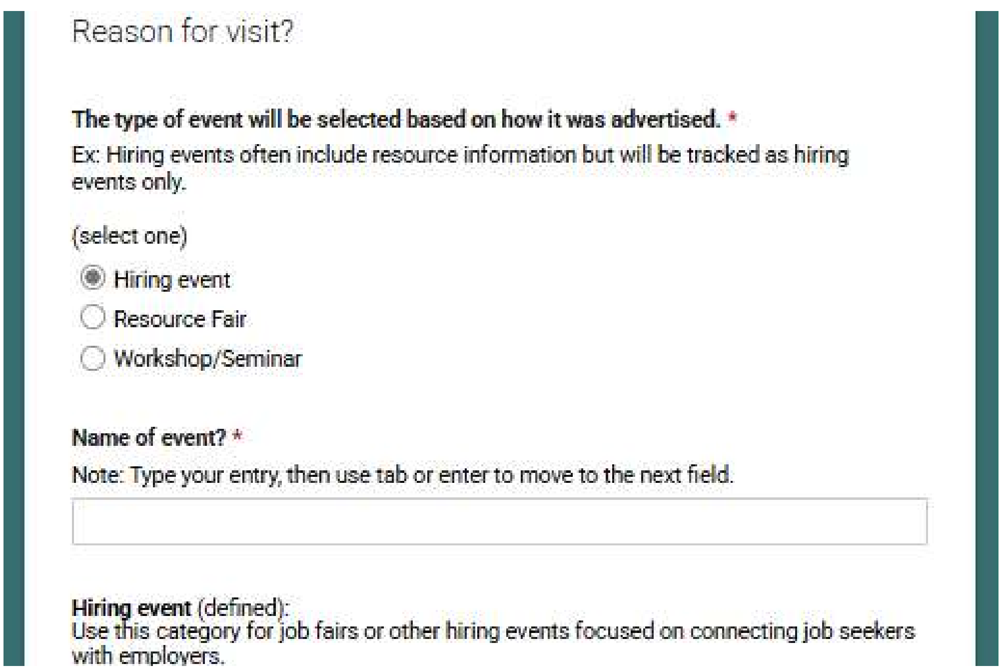
Enter the number of customers in the group that identified their last employer as the Federal Govt.



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.

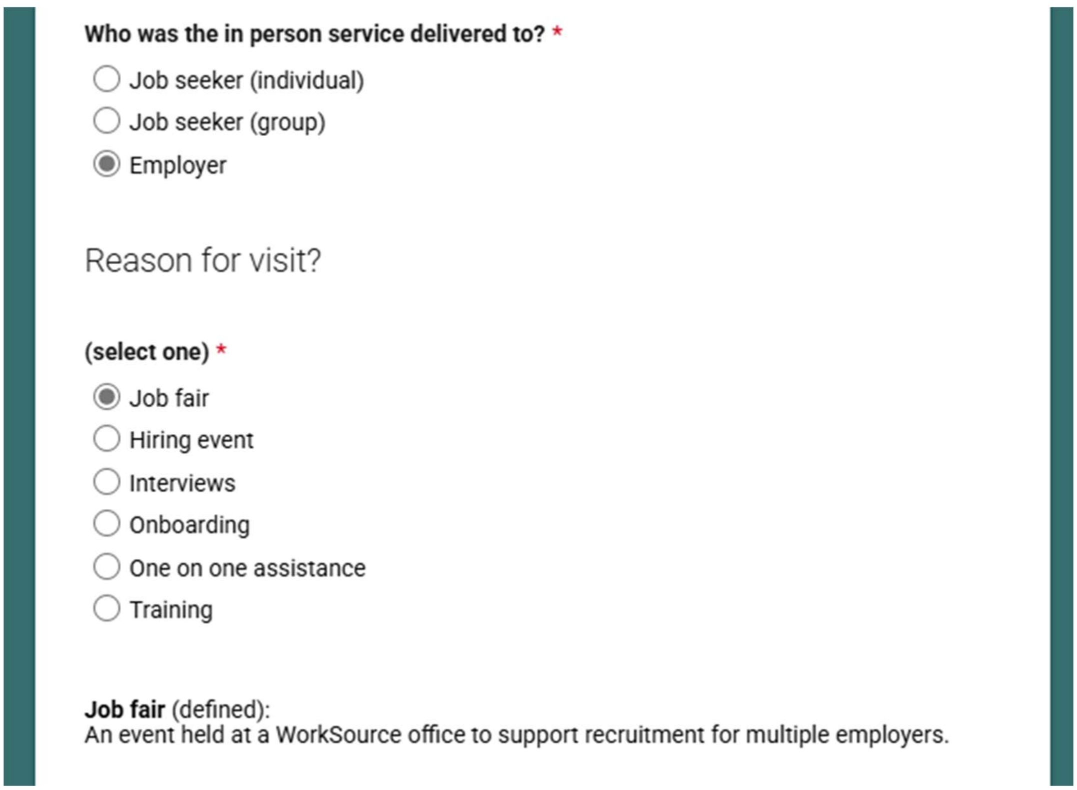


For Employer Entries

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.



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