Customer Flow Tracker Procedures
For External Users

External Users is defined as anyone accessing the Customer Flow Tracker (CFT) that <u>does not</u> 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

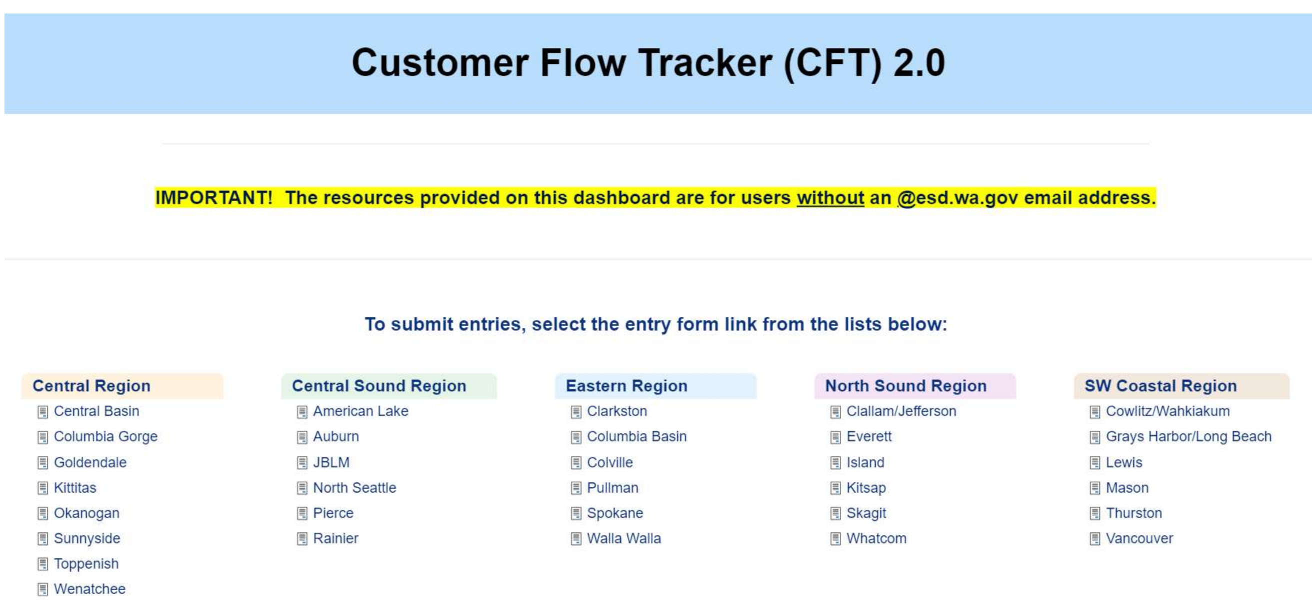
Smartsheet accounts are FREE. If you are prompted to request a license, always ignore the request. A license is not needed to view/update resources in the CFT.

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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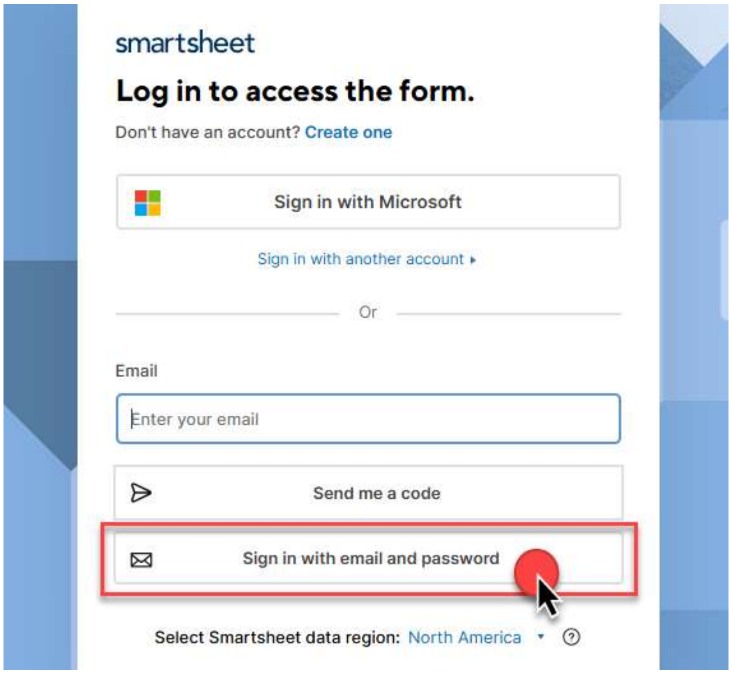
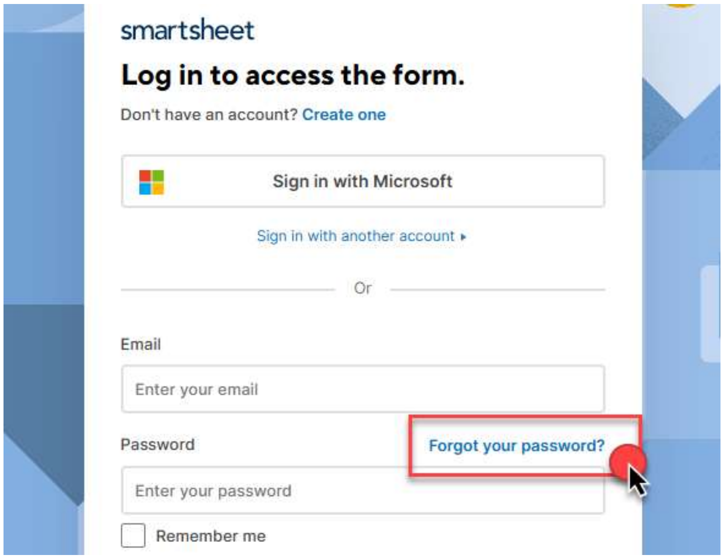
3. Select an entry form link from the location lists on the dashboard.
4. A new tab in your web browser will open and request your Smartsheet login information. (note: If you have not previously registered with Smartsheet you can do that by selecting “Create one”)
   - Use the “Sign in with email and password” option.

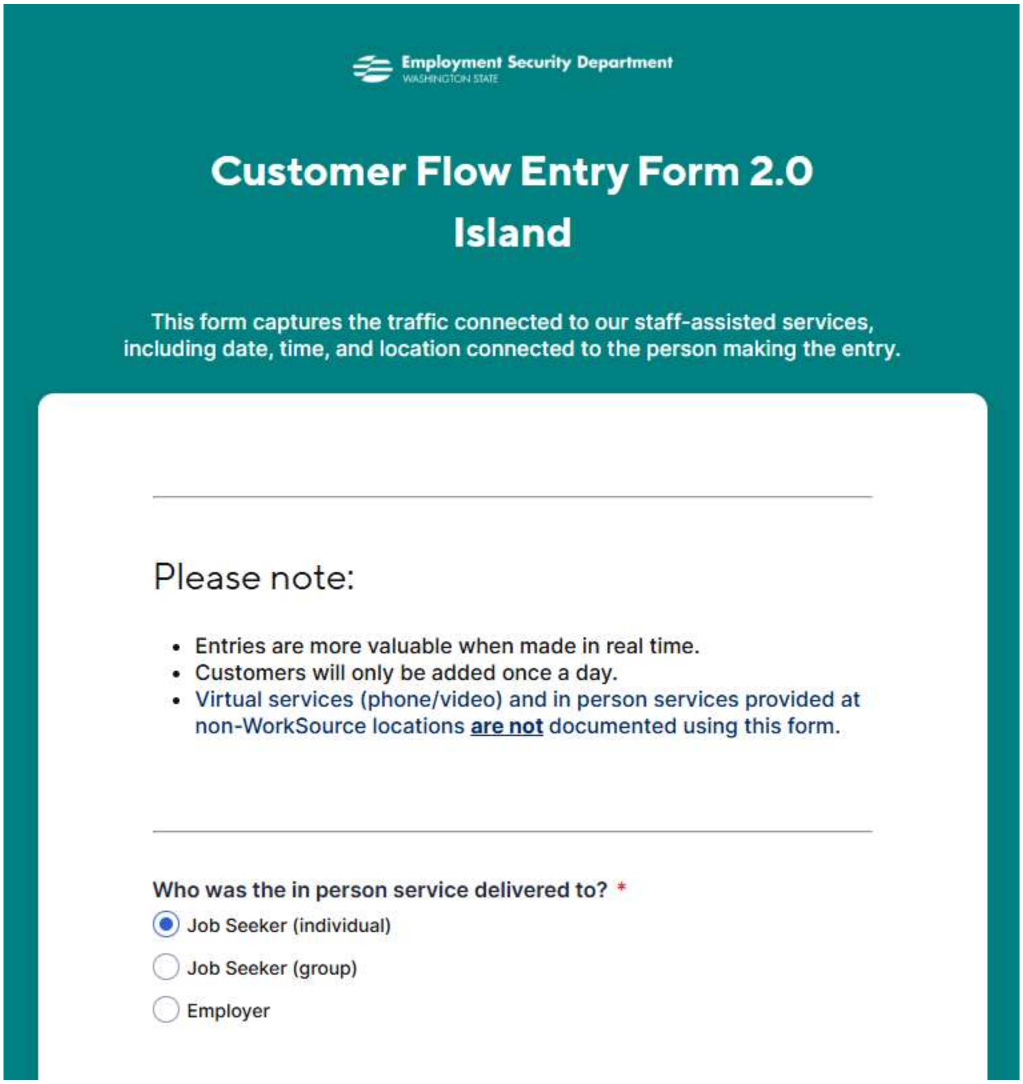


   - If you forgot your password, select “Forgot your password” to help reset your password.



Note: If you are directed to your Smartsheet home page, you can close that tab and go back to the previous web browser tab open to the dashboard to reselect the entry form link.

5. Complete the form:
    - Make a selection for “Who was the in-person service delivered to?”
    - Use the unique section steps in this guide to complete the form.



Employment Security Department
WASHINGTON STATE

Customer Flow Entry Form 2.0
Island

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

Please note:

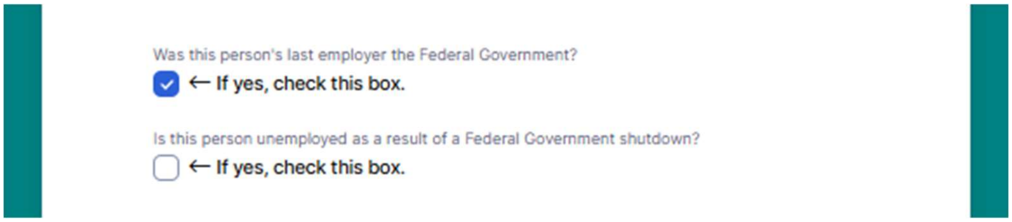
- Entries are more valuable when made in real time.
- Customers will only be added once a day.
- Virtual services (phone/video) and in person services provided at non-WorkSource locations **are not** documented using this form.

Who was the in person service delivered to? *

- (•) Job Seeker (individual)
- ( ) Job Seeker (group)
- ( ) Employer

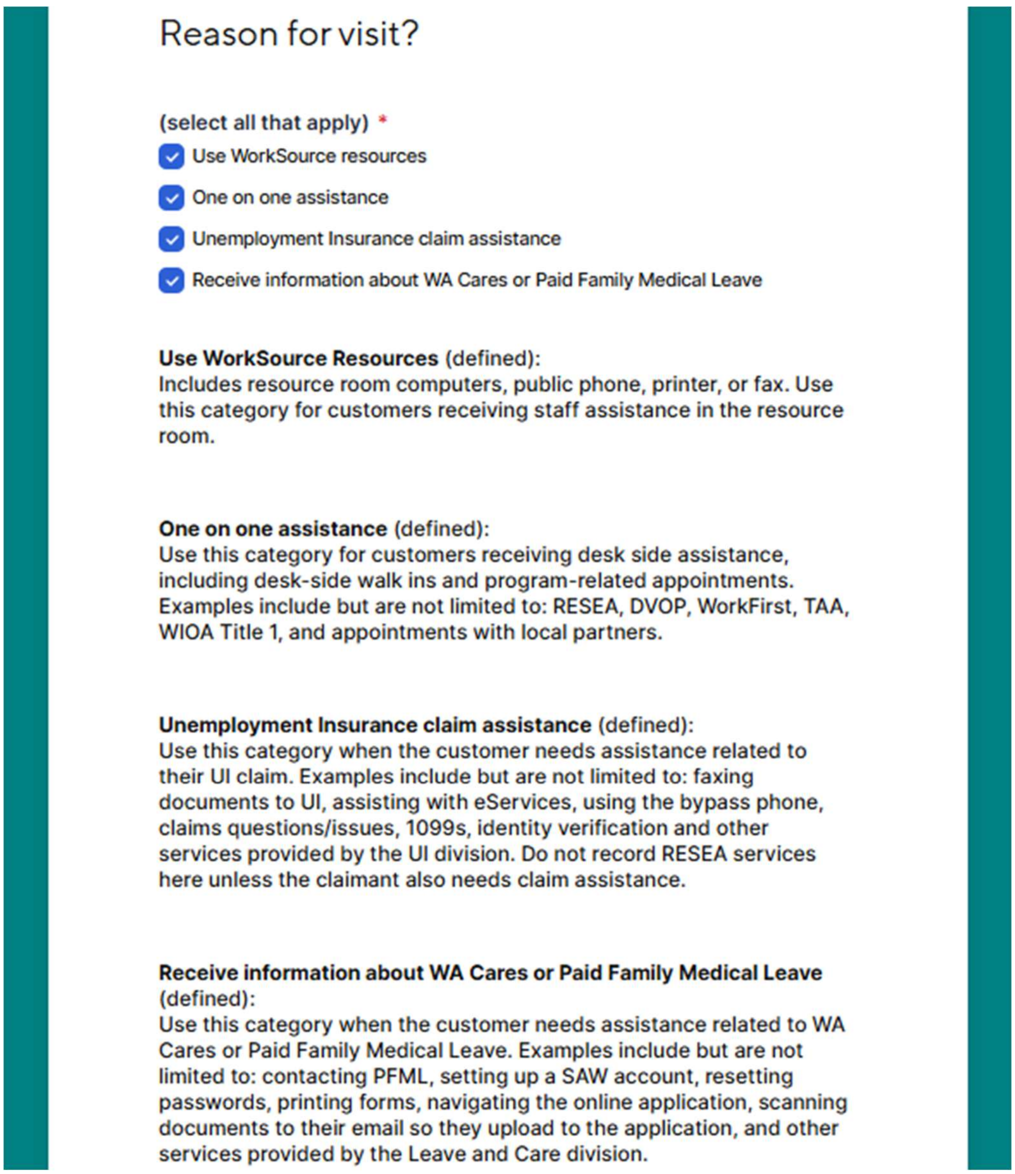
For Job Seeker (individual) Entries

- If the customers last employer was the Federal Government, check the box.
- If the customer is unemployed as a result of a Federal Government Shutdown, check the box.


Was this person's last employer the Federal Government?
☑ ← If yes, check this box.

Is this person unemployed as a result of a Federal Government shutdown?
☐ ← If yes, check this box.

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


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

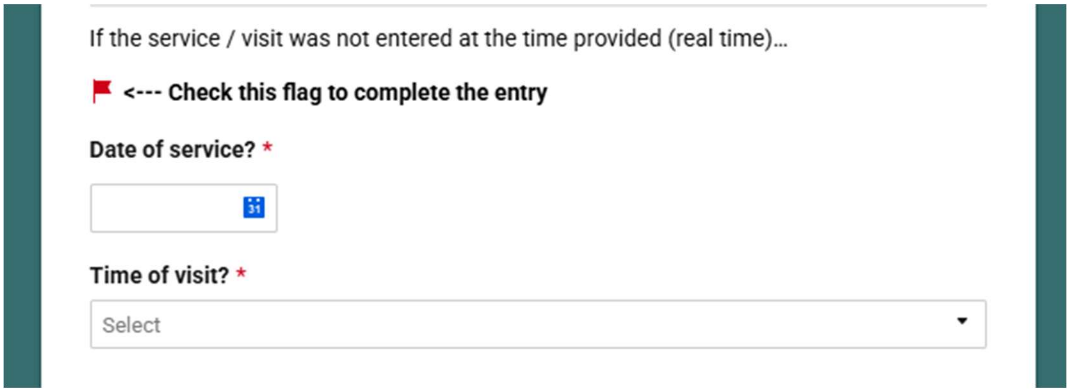
Use WorkSource Resources (defined):
Includes resource room computers, public phone, printer, or fax. Use this category for customers receiving staff assistance in the resource room.

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.

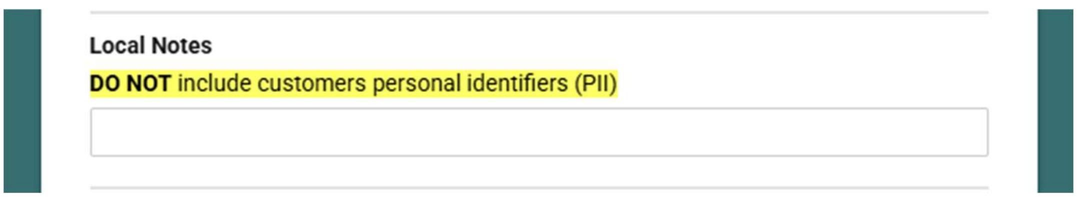
Unemployment Insurance claim assistance (defined):
Use this category when the customer needs assistance related to their UI claim. Examples include but are not limited to: faxing documents to UI, assisting with eServices, using the bypass phone, claims questions/issues, 1099s, identity verification and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

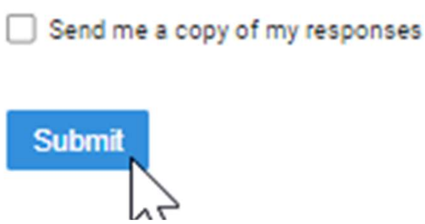
- Individual entries should be made in real time. If that is not possible, select “Check this flag…” and enter the information to indicate date and time range of visit.



- 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.

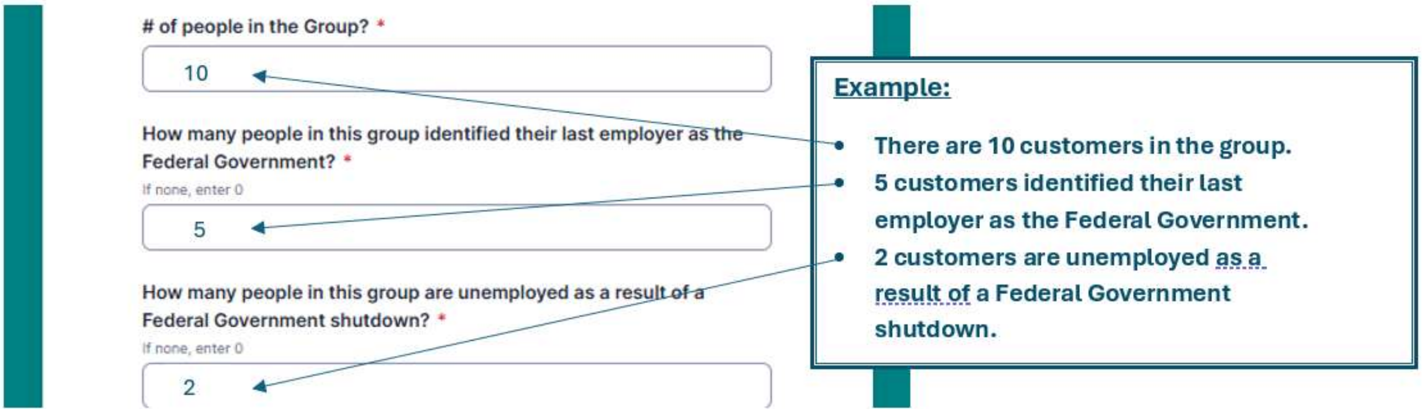


Once the form is complete, select “Submit” and a new form will immediately populate.

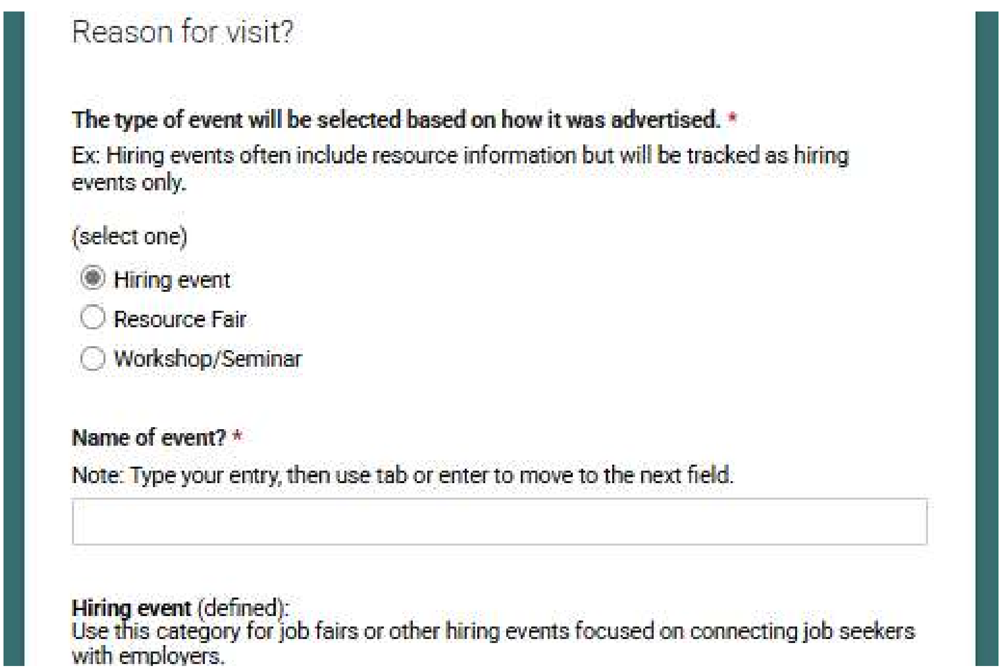


For Job Seeker (group) Entries

- 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 Government or is unemployed as a result of a Federal Government Shutdown.



- 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.

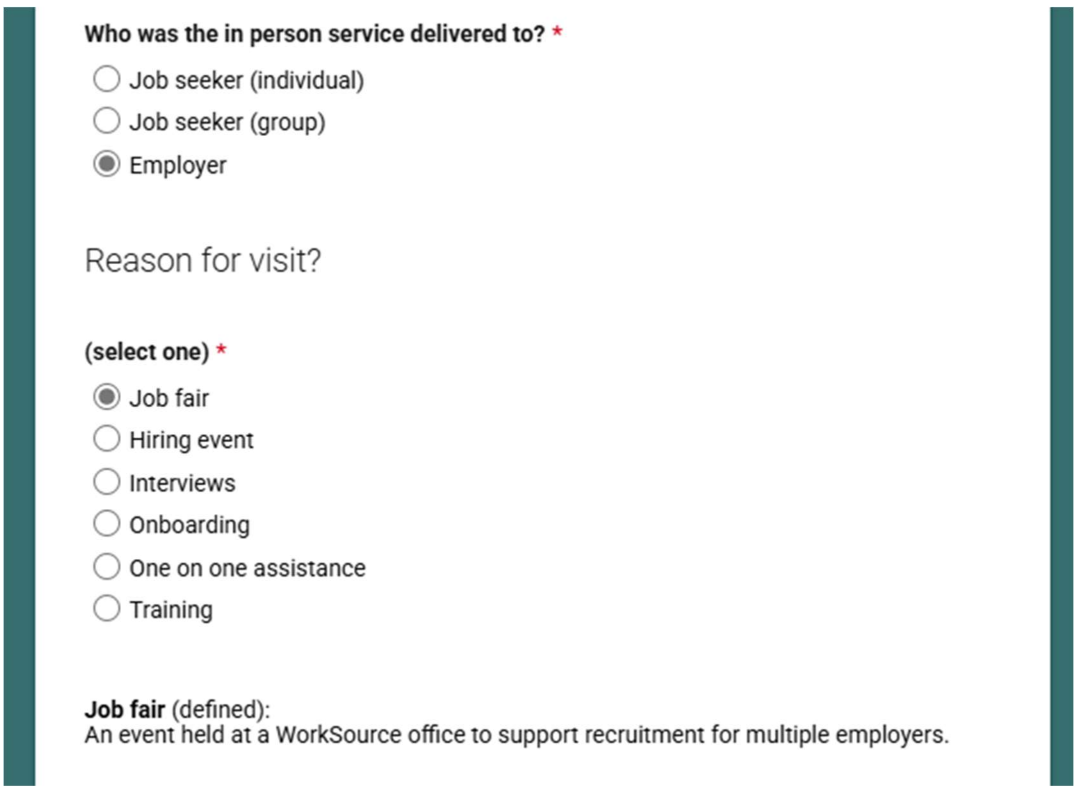


For Employer Entries

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.



Who was the in person service delivered to? *

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

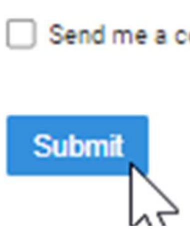
Reason for visit?

(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

Submit