Customer Flow Tracker Procedures

Open both ETO and Customer Flow Tracker (CFT)

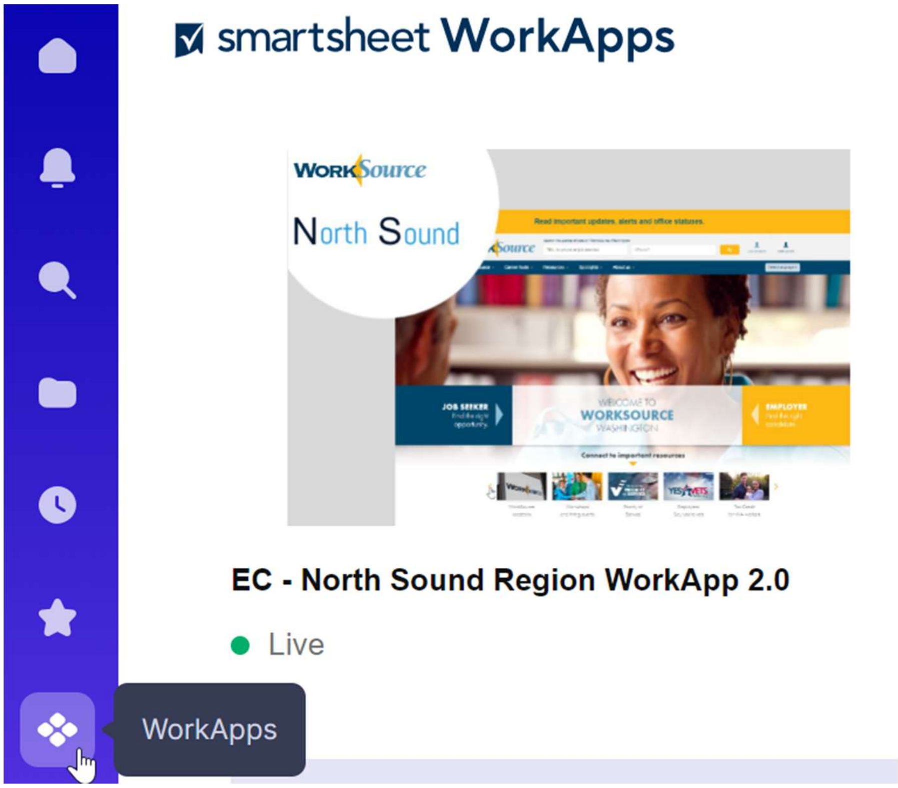
Locate customer in ETO and ask the standard questions (VET, MSFW). If you can't locate them in ETO, encourage them to create an account. You will still count the service in the CFT.

> **Important!** To access the Customer Flow Tracker you must have an ESD issued Smartsheet account. If you are a new employee, ask your leadership to request an account for you.
>
> For reference, the process document "CFT 2.0 – Smartsheet WorkApps Access - How to add or delete a staff member" can be found on the WPC websites Customer Flow Tracker page.

CFT Process Steps:

Navigate to the WorkApps Section of Smartsheet using one of the options below:

- Direct Link: https://app.smartsheet.com/workapps
- Smartsheet Navigation: Open https://app.smartsheet.com/
    - Navigate to the WorkApps section by selecting the diamond icon in the left-side menu bar.
    - Then select your regions 2.0 WorkApp.



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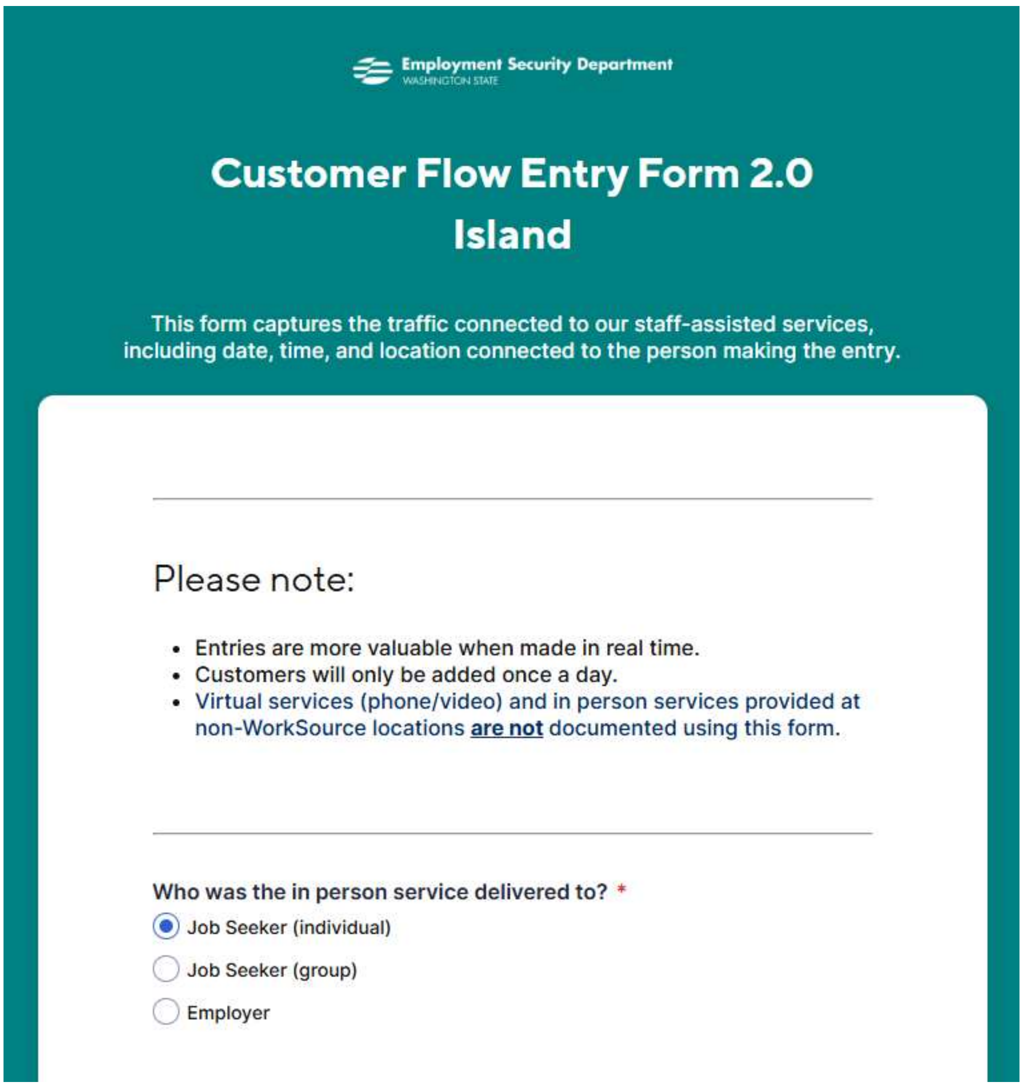
Customer Flow Tracker Procedures

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.

Steps to complete the form

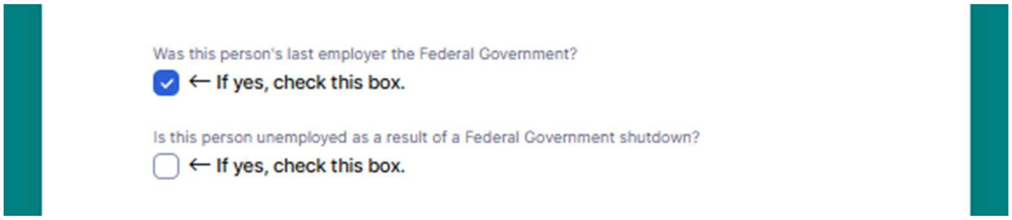
1. Make a selection for “Who was the in-person service delivered to?”
2. Then follow the unique section steps in this guide to complete the form.



Customer Flow Tracker Procedures

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.

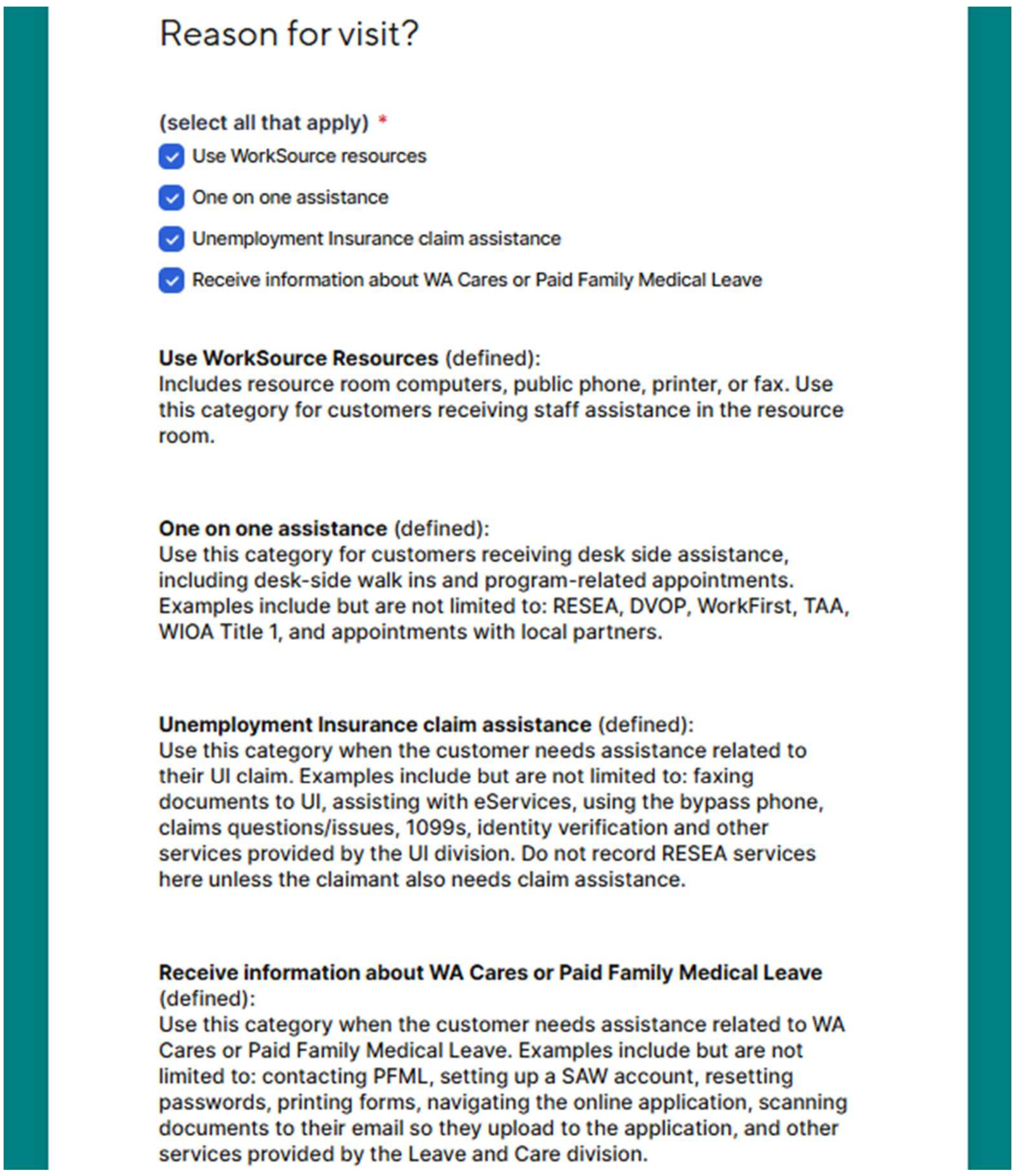

Was this person's last employer the Federal Government?

- [x] ← **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) *

- [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.

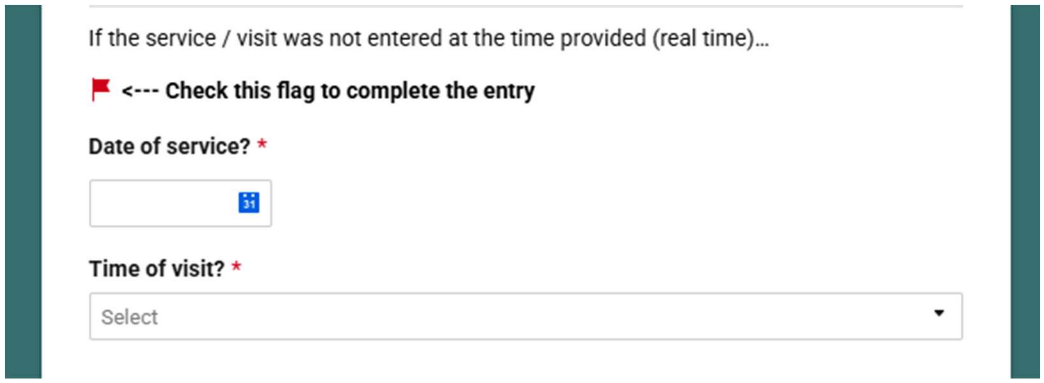
One on one assistance (defined):
Use this category for customers receiving desk side assistance, including desk-side walk ins and program-related appointments. Examples include but are not limited to: RESEA, DVOP, WorkFirst, TAA, WIOA Title 1, and appointments with local partners.

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.

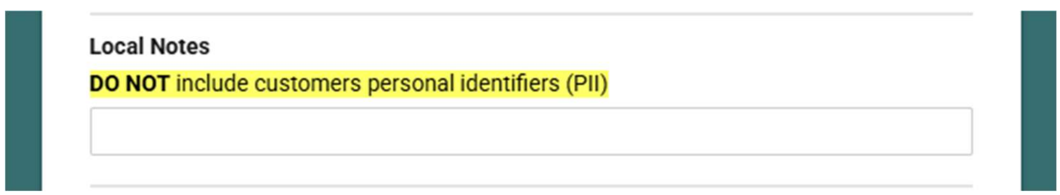
Receive information about WA Cares or Paid Family Medical Leave (defined):
Use this category when the customer needs assistance related to WA Cares or Paid Family Medical Leave. Examples include but are not limited to: contacting PFML, setting up a SAW account, resetting passwords, printing forms, navigating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

Customer Flow Tracker Procedures

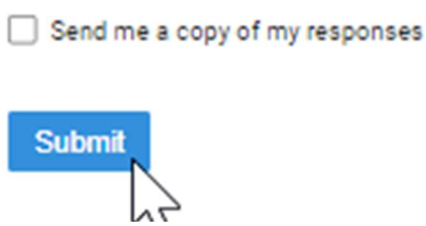
- Individual entries should be made in real time. If that is not possible, select "Check this flag…" and enter the information to indicate date and time range of visit.



- 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 (PII) is not included.



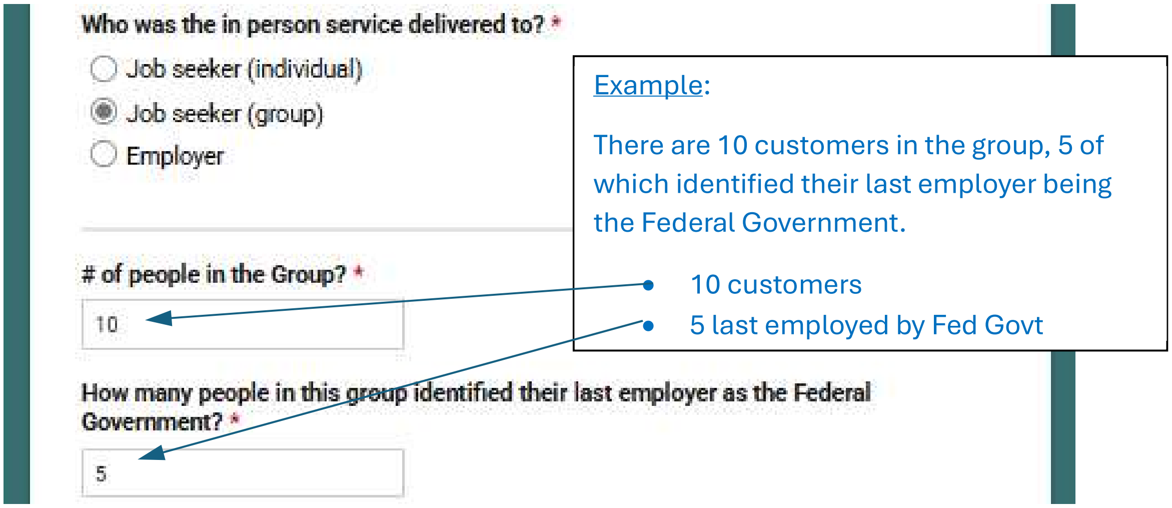
- Once the form is complete, select "Submit" and a new form will immediately populate.



Customer Flow Tracker Procedures

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.



Who was the in person service delivered to? *

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

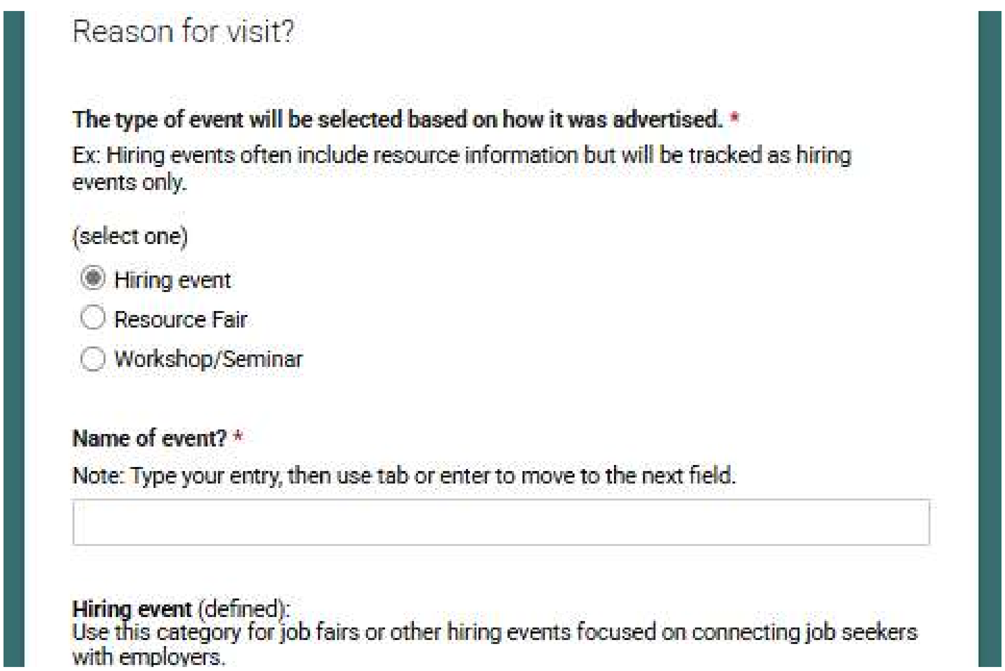
# of people in the Group? *

10

How many people in this group identified their last employer as the Federal Government? *

5

- Enter the reason for visit. Once a selection is made, the definition is also provided.
  - Best Practice: For local notes, use 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.



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? *

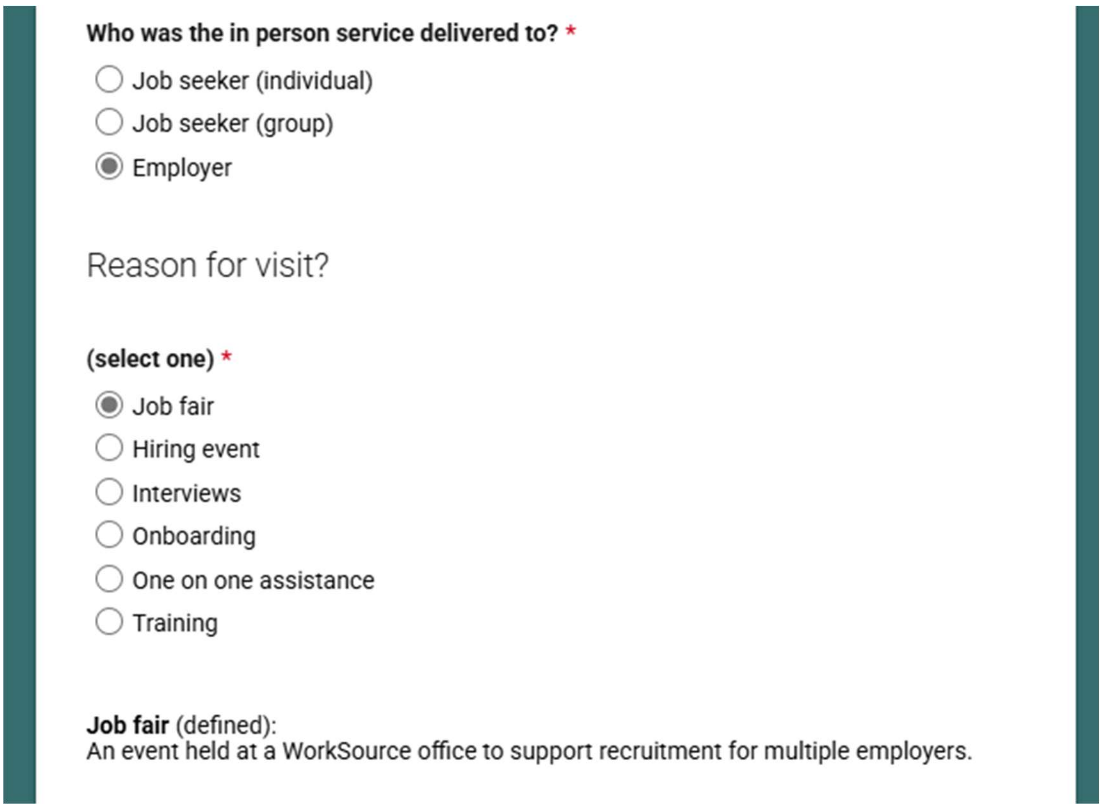
Note: Type your entry, then use tab or enter to move to the next field.

Hiring event (defined):
Use this category for job fairs or other hiring events focused on connecting job seekers with employers.

Customer Flow Tracker Procedures

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.