

Washington State WorkSource Information Notice (WIN)

WIN Number: 0129, Change 4

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

Date: March 13, 2024

Expiration: N/A

Purpose:

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

This fourth revision clarifies funding expenditure limits for participants from populations over 200% of FPL.

Action Required:

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

Background:

In recognition of the work that Washington's workforce development system did to alleviate poverty through the Economic Security for All (EcSA) Initiative, Governor Inslee and the Legislature approved a \$6.2 million appropriation of state general funds for Program Year 2022 (Fiscal Year 2023) to be allocated to Local Workforce Development Boards (LWDBs) to expand on the work previously done by local EcSA programs funded by the Governor's WIOA statewide activities funds. In Program Year 2023 (Fiscal Year 2024) the Legislature and Governor continued to allocate the \$6.2 million per year for individuals below 200% of the Federal Poverty Line (FPL), while also providing an additional \$2.6 million per year to serve individuals over 200% of the FPL but at who are at risk of falling into poverty. Because this new allocation is state funded, these new resources provide an unprecedented opportunity to further expand the services provided by LWDBs to improve workforce outcomes and reduce poverty across Washington State. This document has been prepared to facilitate the allocation of these funds and provide guidance in the planning and implementation process.

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

Content:

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 new 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 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 immediate 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) and EcSA Technical Advisory Committee 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 Income Adequacy, 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.

Eligibility:

To be eligible for **State EcSA—Under 200% of the FPL**, applicants must meet the following requirements:

- From households that are below 200% of the Federal Poverty Level.
- Meet basic eligibility requirements for any of the three WIOA Title I-B formula programs, excluding requirements to register for Selective Service.

To be eligible for **State EcSA—Above 200% of FPL**, applicants must meet the following requirements:

- Be from households that are above 200% of the FPL at the time of program enrollment.
- Below their self-sufficiency goal or determined to be likely to fall into poverty with appropriate documentation in case notes, in accordance with policy set by the LWDB.
- Meet basic eligibility requirements for any of the three WIOA Title I-B formula programs, excluding requirements to register for Selective Service.

One of the major goals of the State EcSA program is the promotion of a holistic approach to fighting poverty. For this reason, co-enrollment in any program that will assist clients to that end is encouraged. **Please note, however, that eligibility for the State EcSA program does not supplant the eligibility criteria for any other program. LWDBs must ensure each participant meets the specific eligibility requirements prior to enrollment in each program.**

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.

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](#).

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 filing the policy with GMO. If desired, the LWDB may work through local policy drafts in consultation with the Grants Management Office and any other subject matter experts whose input may be of value.
- To facilitate enrollment into the EcSA program for individuals over 200% of the Federal

Poverty Line, LWDBs are required to establish local policies to define the factors that make an applicant likely to fall into poverty. Once this policy is established, the LWDB must provide a copy to the Grants Management Office for filing. Circumstances include but are not limited to:

- Recent loss of employment
- End of unemployment insurance payments or other public assistance
- Loss of housing
- Status as a recent victim of domestic violence or stalking
- **Funding expended from State EcSA funds for clients over 200% of the FPL may not exceed \$5,000 spent on incentives and support services combined for any single participant.** This does not include the cost of staff support or career services provided to the participant, or any training costs. **This limit is exclusively applied to the State EcSA program and does not include any costs paid by other funds such as WIOA or Federal EcSA.**
- 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.

Enrollment and ETO Guidance/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, 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 WIN 0129. As a designated supervisor, I reviewed and approved the late entry".
- See [Attachment B](#) for enrollment procedures.

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.
- 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.

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.

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.

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
- [Chapter 297, Laws of 2022, Section 225\(25\)](#), March 31, 2022

Website:

[Workforce Professionals Center](#)

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*

Attachments:

- [Attachment A](#) - Approval Procedure for Additional Elements
- [Attachment B](#) - ETO Enrollment Procedures
- [Attachment C](#) - Self-Sufficiency Calculator Step-By Step Guide

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 Income Adequacy, 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".



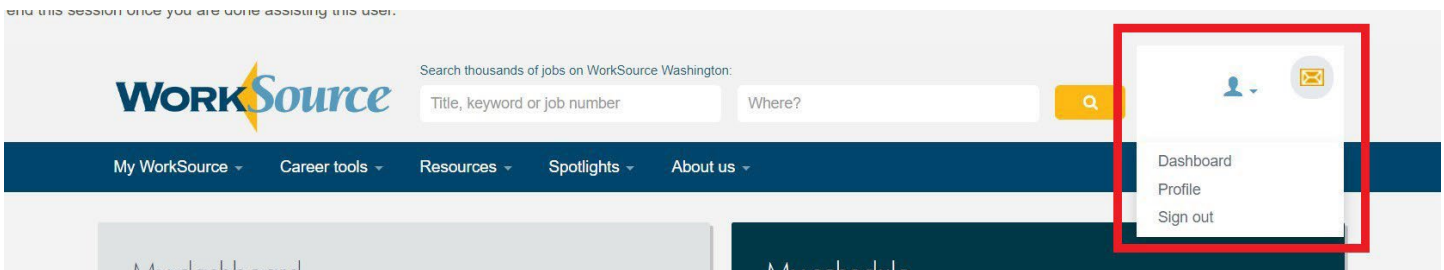
- If they do not have an account on worksourcewa.com, you will get the following message:

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 My.WorkSourceWA.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 a client dashboard for Gregor Samsa. The dashboard is organized into several panels:

- Participant Information:** Displays personal details for Gregor Samsa, including first and last name, email (samsa@meta_morph), case number (760514), date of birth (01/01/1980), and age (42 years).
- General Information:** A section for general information with a '+ New' button.
- Most Recent (5) Program Enrollments:** A section for recent enrollments with a '+ New' button highlighted by a red box.
- RESEA TouchPoints:** A section for RESEA touchpoints with a '+ New' button.
- Account Creation and Associated Activities:** A section for account creation with a '+ New' button.
- Most Recent (25) Basic Career Services:** A section for recent career services with a '+ New' button.
- Program Management Forms:** A section for program management forms with a '+ 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.

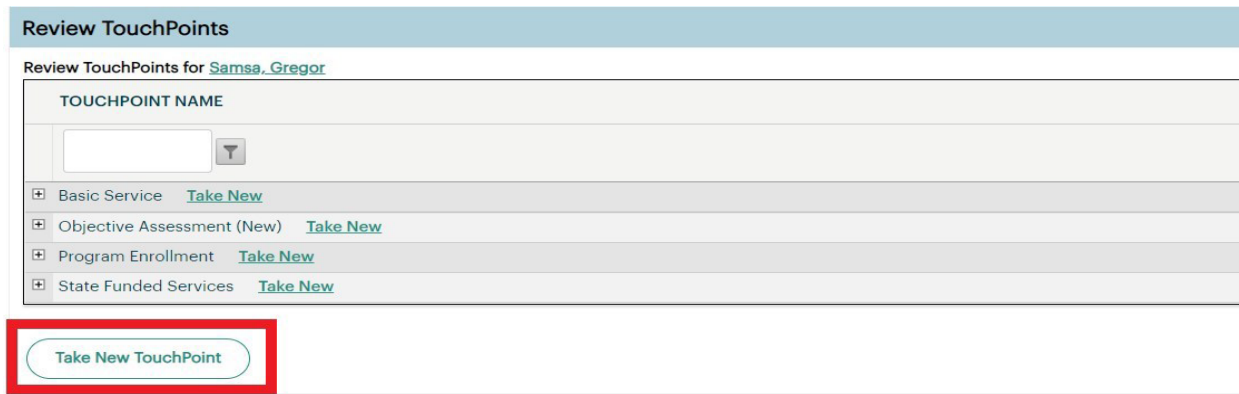
Adding a Service

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

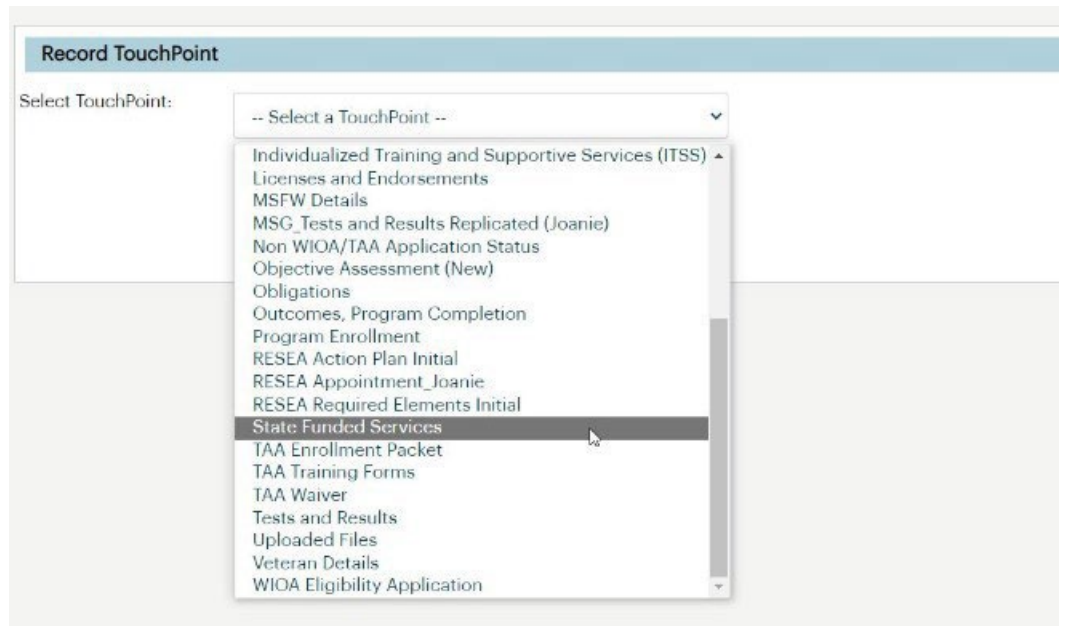
The screenshot shows Gregor Samsa's ETO dashboard. The dashboard is titled "Gregor Samsa's Dashboard" and features two main columns of navigation options:

- Seekers/Participants:**
 - Home
 - Case Notes History
 - Seeker Summary
 - Review Seeker/Participant Touchpoints** (highlighted with a red box)
 - Seeker/Participant Office History
- TAA Functions:**
 - Obligation Balances
 - TAA/TRA Determination

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



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



- 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 a form with the following fields:

- Start Date ***: A date picker showing 6/13/2022.
- End Date ***: A date picker showing mm/dd/yyyy.
- Service ***: A dropdown menu with a list of services categorized into 'Basic' and 'Individualized'.

Basic Services:

- 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
- State EcSA Resume Review

Individualized Services:

- 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
- 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.

The screenshot shows a form with the following fields:

- Type of Resource Provided ***: A dropdown menu with options: Childcare, Housing, Automotive repair, Other. A red error message is displayed: "Type of Resource Provided: This question requires an answer."
- Company or Agency Providing Resource**: An empty text input field.

- 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.

The screenshot shows a form with the following fields:

- Type of Resource Provided ***: A dropdown menu with "Other" selected.
- If Other, List Resource Here ***: An empty text input field.
- Amount ***: A text input field with a dollar sign (\$) symbol.

- 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.
- 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:

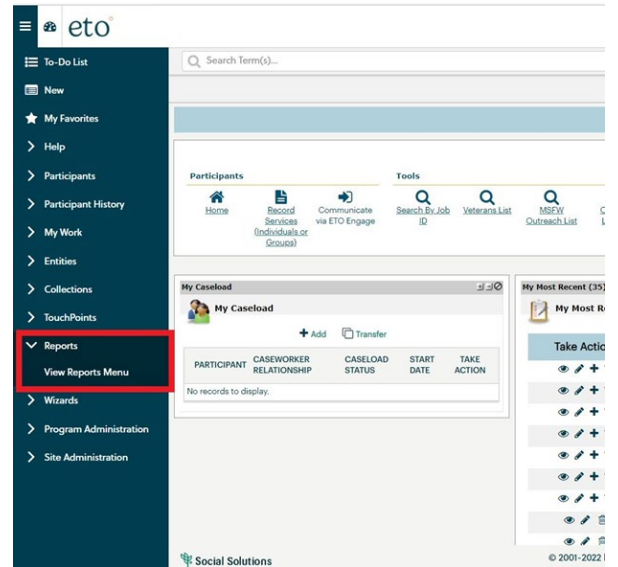
To assist with tracking case management and service provision, the following ETO reports are recommended:

- Program Enrollments Report Without Demo Details

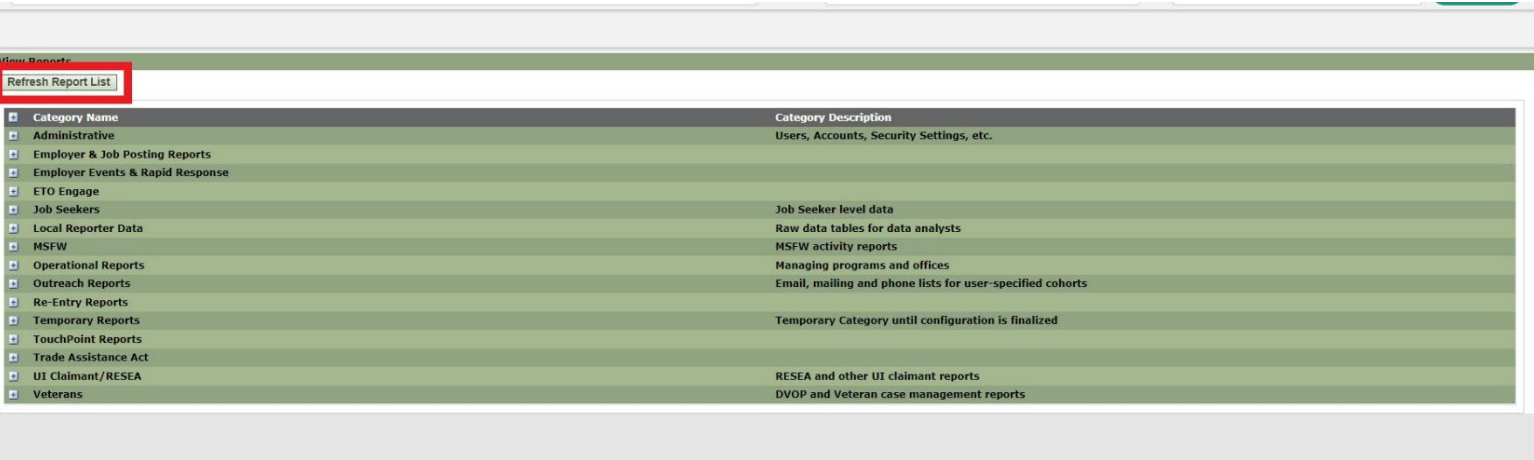
- Outcomes Touchpoints With Employment Start Date Information
- Case Management Report without Demographic Details
- Local Reporter Data Optimized
- Create a Record in ETO

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

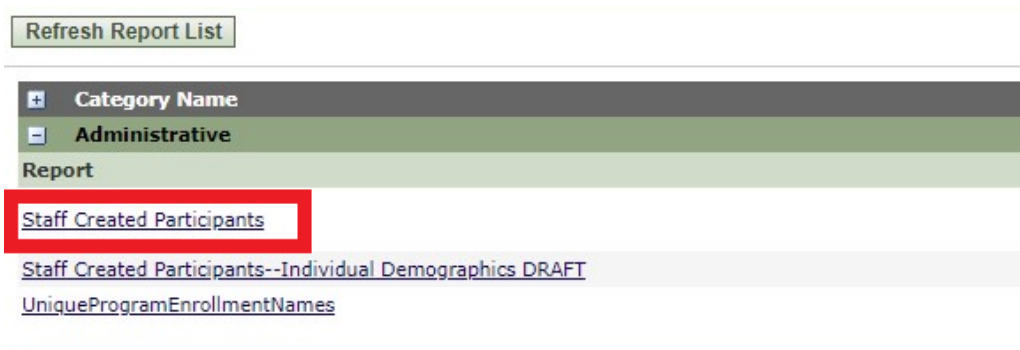
- Local Reporter Services Report OPTIMIZED
- Program Enrollment Outcomes



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



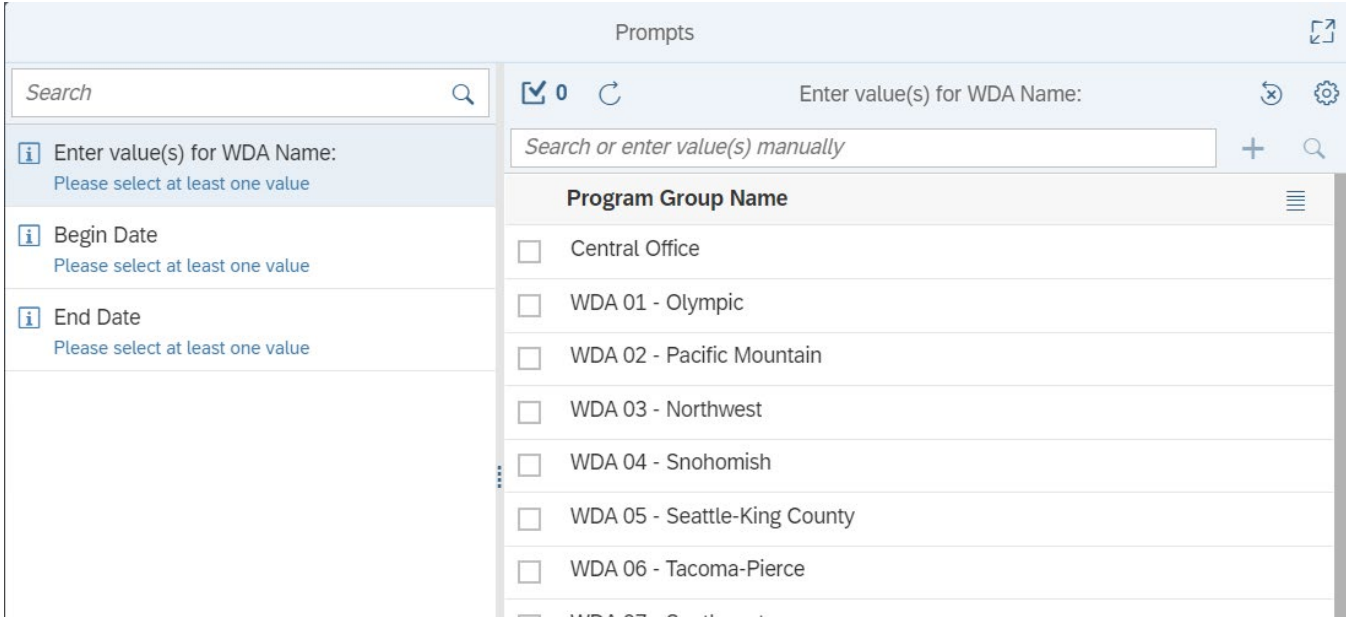
- Administrative Report
 - Staff Created Participants



Selecting Data:

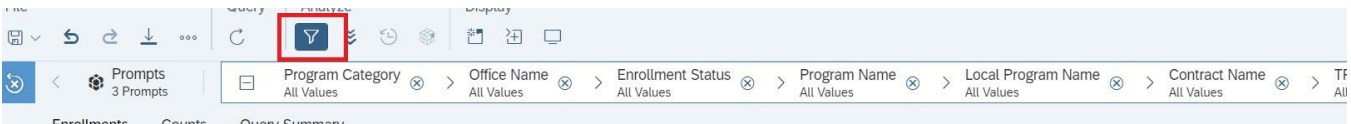
- Select dates and areas from which to collect information.

- Remember, the more you select for time and area, the longer the report takes to populate.



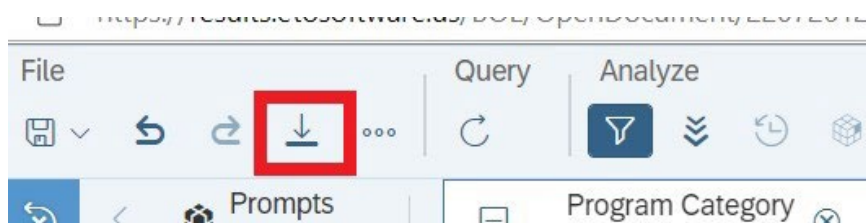
Navigating the Report

- 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.

Attachment C



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.