



## **1. Background**

Economic Security for All (EcSA) is a poverty reduction model that coordinates existing programs to increase their collective ability to support low-income Washingtonians in their pursuit of equity, dignity, and sustained self-sufficiency. The original EcSA program is still funded by WIOA and is subject to policies and requirements of federal services. This policy provides guidance and clarification for the deployment of WIOA-funded EcSA services, as distinct from the side of the program funded by state general funds.

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.

## **2. Program Requirements**

- a. The priority of these funds is to accomplish the following goals:
  - i. Leverage WIOA and non-WIOA services (public assistance programs, housing, many others) to stabilize customer's lives, conveniently and with dignity for the customer.
  - ii. Establish and implement customized career plans to reach 100% of participant income adequacy, as established by the UW self-sufficiency calculator.
  - iii. Provide extensive wrap-around services and continue bundling benefits to maintain stability as customers pursue their customized career plan, continuously until they reach income adequacy.
  - iv. Include people experiencing poverty in program design and implementation.
  - v. Work collaboratively across local, state, and federal levels to remove barriers to coordinated delivery of multiple benefits.
- b. To properly measure accomplishment of these goals, service providers must comply with the following requirements:
  - i. After enrollment into the program in accordance with Federal EcSA policy, all clients must be tracked in ETO (or its successor) according to the case management policies and procedures required by the WIOA Title I-B program and as laid out in Attachment B below.
  - ii. Clients must be assessed using the UW Self-Sufficiency Calculator and their information stored at program entry and upon attainment of employment 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 to demonstrate whether the client has reached their income adequacy and/or self-sufficiency goal.

## **3. Eligibility**

In order to meet eligibility requirements for the Federal EcSA program, applicants must fall into one of the following eligibility pools:

- a. Below 200% of Federal Poverty:
  - i. Be from a household (as defined by Health and Human Services (HHS) poverty guidelines) that is below 200% of the Federal Poverty Level, and
  - ii. Meet basic or comprehensive eligibility requirements for any WIOA Title I program; **OR**

- b. Over 200% of Federal Poverty:
  - i. Be from a household over 200% of the Federal Poverty Line, meet basic or comprehensive eligibility requirements for any WIOA Title I program; and
    - 1. Still be below self-sufficiency wage as defined by the UW Self-Sufficiency Calculator, OR
    - 2. Are at risk of falling into poverty based on factors determined by the criteria below. Staff can determine the likelihood to fall into poverty through an interview, folder review, assessment, or combination thereof. However, if any part of the determination involves medical information, the information should be stored in a confidential file outside of ETO with a case note referencing this file. Do not include medical information in the eligibility determination case note. To qualify as likely to fall into poverty, the participant, or a member of the participant's household whose income supports household expenses, must experience one or more of the following circumstances:
      - a. Recent loss of employment or expects to lose employment (e.g., has received layoff notice or expects to be laid off due to seasonality of a job);
      - b. Anticipates end of unemployment insurance payments or loss of other formerly permanent benefit, including public assistance;
      - c. Status as a recent victim of domestic violence or stalking;
      - d. Relies upon gig work, multiple jobs, or undesirable work hours in order to maintain self-sufficiency;
      - e. Will need to reduce work hours or leave employment due to lack of childcare availability or inability to afford available childcare;
      - f. Is facing the loss of, or potential loss of, housing or is experiencing unstable housing (e.g., has receive notice of rent or utilities increases, an eviction notice, or similar);
      - g. Facing a large expense that they cannot afford (e.g., medical expense, car repair or similar);
      - h. Is expecting loss of household income due to other changes in circumstances (e.g., upcoming divorce or separation, death in the family, institutionalization or incarceration of a family member, etc.); or
      - i. Other reasonable circumstances that cause risk of poverty, if submitted to SWC and approved in writing (maintain record of approval in the client's file).
  - ii. The maximum allowable enrollment for individuals who are over 200% of the Federal Poverty Line (FPL) is 15% of all Federal EcSA enrollments. Once enrolled, individuals over 200% of the FPL must be served in accordance with all the same rules and policies that govern individuals enrolled while below 200% of the FPL.
- c. One of the goals of the Federal 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:
  - i. Eligibility for the Federal EcSA program does not supplant the eligibility criteria for any other program. Service providers must ensure each participant meets the specific eligibility requirements prior to enrollment in each program.
  - ii. Likewise, prior or simultaneous co-enrollment in another program does not relax eligibility and documentation requirements for the Federal EcSA program. While actions undertaken to meet the requirements of other programs may be used to satisfy Federal EcSA requirements, those elements **must** also meet Federal EcSA requirements in order to satisfy eligibility policies.
  - iii. This is particularly vital in the creation of the career plan. Individuals who are enrolled in Federal EcSA must be administered the UW Self-Sufficiency Calculator, and the results of this must be

included in a comprehensive plan to help the participant to attain employment that meet or exceeds their income adequacy goal.

- d. In order to demonstrate eligibility, service providers are required to maintain documentation for each participant that verifies the following:
  - i. U.S. Citizenship or otherwise legally entitled to work in the U.S
  - ii. Age
  - iii. Household income status (reference Attachment A for income guidelines)
  - iv. Selective Service registration, if applicable
    - In accordance with Federal policy, individuals who were required to register but who did not do so and can demonstrate that their failure was not knowing or willful may be served under the Federal EcSA program. These individuals must have an approved exception from the SWC in accordance with [SWC Policy WS816 R4 – Eligibility Policy and Handbook](#).

Note: To better facilitate co-enrollment and local monitoring, the documents permitted to satisfy the above are the same as those designated by SWC policy for the WIOA Title I program.

#### **4. Allowable Uses of Federal EcSA Funding**

- a. Funds allocated and expended under the Federal EcSA program must comply with the regulations governing the use of WIOA Title I-B statewide activities funds, including federal, state, and local policy rules controlling the use of WIOA formula funds.
- b. Federal 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.
- c. To ensure the equity of client service and expenditure decisions under the Federal EcSA program, all services and expenditures must follow existing SWC services policies for the WorkSource System in Spokane, including policies that cover support services, training services, and establishing priority of service for expenditures. All system services policies are incorporated by reference and are available here: <https://spokaneworkforce.org/workforce-resources/policies/>

#### **5. Documentation and Data Entry Requirements**

- a. Enrollment, eligibility, services, and all other aspects of client progress must be recorded in State MIS (currently ETO) according to the data entry instructions in Attachment B.
- b. An Individual Employment Plan (IEP) must be established for every Federal EcSA enrollee, whether below 200% of the FPL or above, and the details must be recorded in accordance with Attachment B of this policy. If a client already has an Individual Employment Plan as a result of prior enrollment in a WIOA or State 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 Federal EcSA program will be used to help the client reach self-sufficiency.
- c. Client data must be entered into the UW Self-Sufficiency Calculator. Tracking of income information in other systems is acceptable for local purposes but does not replace this requirement.
- d. 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.
- e. In the interest of data integrity, it is imperative, to the fullest extent possible, that data entered into ETO accurately reflect the service provided at the time the service is provided. The minimum ETO data entry requirements are as follows:
  - i. Services must be entered at the point in time at which they are delivered. If services cannot be entered at the time they are delivered, Federal 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-day period to correct errors or further describe circumstances are acceptable.

- ii. For any Federal EcSA service errors identified after the 14-day calendar 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-day allowable timeframe per WIN 0135. As a designated supervisor, I reviewed and approved the late entry."

## **6. Performance and Evaluation**

Success of the program will be measured based on the following criteria, which will be determined each program year during contract negotiations and will be included in service providers' contracts with the SWC:

- a. Reach target number of enrollments for individuals who meet eligibility requirements of the program.
- b. Reach target number of participants enrolled in training for a career with starting wages above their unique self-sufficiency goal.
- c. Reach target number of participants with employment income above their self-sufficiency goal.
- d. Meet targets for expenditure of funding on the schedules set in your contract with the SWC.
- e. Use the designated UW Self-Sufficiency Calculator and record the results at intake and exit from program in accordance with the guidance provided. The recorded results may be updated as circumstances require.
- f. For the purposes of tracking target enrollments in Federal 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 Federal EcSA program. The second is the total number of unique individuals enrolled across the State and Federal EcSA programs.

*Example: If the Federal EcSA contract has a requirement for 30 participants and 30 State EcSA participants, the requirement for general enrollment in State EcSA is 30, and the 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.*

## **7. Monitoring**

The Federal EcSA program will be monitored by the SWC during program monitoring of all grants and programs funded by the SWC; the time and manner of monitoring is to be determined in consultation with the WorkSource Providers' Consortium.

## **8. References**

- Washington State Policy WorkSource Information Notice 0135
- UW Self-Sufficiency Calculator
- Spokane Workforce Council WIOA Title-I and WorkSource System Policies

## **9. Supersedes**

- None

## **10. Attachments**

- Attachment A – Federal EcSA Income Guidelines
- Attachment B – ETO Enrollment Procedures
- Attachment C – Self-Sufficiency Calculator Step-by-Step Guide



WorkSource System Policies and Procedures

**Policy #W422**

**Effective Date:** March 2024

The Federal EcSA program utilizes the Federal Poverty Level (FPL) as part of the eligibility process to receive services funded by Federal EcSA.

Determining income status must take into consideration household size and includable/excludable income (defined below).

This policy does not apply to those who qualify as low income based on receipt of public assistance, homelessness, free or reduced-price lunch, youth living in a high-poverty area, or foster care (as defined in SWC Services and Program Eligibility Handbook Section 5.7).

For individuals not considered “low income”, they must be assessed as having an income over the last 6 months either above or below 200% of the FPL in order to determine eligibility for the state EcSA program.

Household Size	200% of Federal Poverty Level <sup>1</sup>		
	Annual	6 Month	Hourly <sup>2</sup>
1	\$30,120	\$15,060	\$14.48
2	\$40,880	\$20,440	\$19.65
3	\$51,640	\$25,820	\$24.83
4	\$62,400	\$31,200	\$30.00
5	\$73,160	\$36,580	\$35.17
6	\$83,920	\$41,960	\$40.35
7	\$94,680	\$47,340	\$45.52
8	\$105,440	\$52,720	\$50.69
	For families/households with more than 8 persons, add \$10,760 to the annual standard for each additional person		

<sup>1</sup> An individual with a disability can be considered a family of one for income determinations.

<sup>2</sup> Hourly rates calculated based on annual full-time employment – annual salary divided by 2080 hours per year. Hourly rate is informational only and is not used to calculate income status.

**References**

- [WIN 0135 – Guidance and Instructions for the Federal EcSA Program](#)
- [HHS Poverty Guidelines for 2024](#)

## Types of Includable and Excludable Income

In addition to required income inclusions and exclusions defined in 20 CFR 680.650 and TEGL 19-16 respectively (noted below), the SWC has defined what is included or excluded as income for income determinations. While the SWC has defined these included and excluded income lists, it is not all-inclusive and may be added to or changed as necessary. For items not on the list, contact the SWC for guidance.

Included Income	
1.	Gross wages and salaries before deductions received from work performed as an employee, including wages earned while in On-the-Job Training (OJT), on reserve duty in the Armed Forces, and severance pay.
2.	Net receipts from non-farm self-employment (receipts from a person's own unincorporated business, professional enterprise or partnership, after deductions for business expenses). Any business losses will off-set wage earnings.
3.	Net receipts from farm self-employment (receipts from a farm which one operates as an owner or renter, after deductions for farm operating expenses). Any farm losses will off-set wage earnings.
4.	Regular payments from railroad retirement benefits, strike benefits from union funds, worker's compensation (not lump sum) and training stipends.
5.	Alimony.
6.	Military family allotments or other regular support from an absent family member or someone not living in the household, except child support payments and military payments indicated below which are excluded from family income calculations.
7.	Pensions whether private or government employee (including military retirement pay).
8.	Regular insurance or annuity payments received by the individual or family member.
9.	College or university grants or scholarships based on merit, fellowships and assistantships (other than needs-based scholarships).
10.	Dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts and net gambling or lottery winnings.
11.	Regular payments from Social Security Disability (SSDI), old-age, and survivors insurance received under the Social Security Act (TEGL 19-16).
12.	Unemployment insurance payments (TEGL 19-16).
13.	Child support payments (TEGL 19-16).

## Excluded Income

1.	<b>Needs-based</b> scholarship assistance, and financial assistance under Title IV of the Higher Education Act, i.e., Pell Grants, Federal Supplemental Educational Opportunity Grants and Federal Work Study, PLUS (Stafford and Perkins loans, like any other kind of loans, are debt and not income).
2.	Non-cash benefits such as employer-paid or union-paid portion of health insurance or other employee fringe benefits, Medicare, Medicaid, food stamps, school meals, food or housing received in lieu of wages and housing assistance.
3.	Allowance, earnings and payments made to individuals participating in WIOA programs or any other workforce development program (except OJT participants) for which eligibility is based upon a needs and/or income test.
4.	Certain one-time cash payments including: tax refunds; one-time gifts; loans, which are debt and not income; assets from the sale of a home, property, or car; one-time insurance settlements; lump-sum inheritances; one-time compensation for injury; etc.
5.	Capital gains and losses.
6.	Assets drawn down as withdrawals from a bank and IRA withdrawals.
7.	Amounts paid while on active duty or paid by the Department of Veterans Affairs (VA) for vocational rehabilitation, disability payments, or related VA-funded programs (20 CFR 680.650).
8.	Cash payments received under Title V of the Older American's Act.
9.	Payments received under the Trade Readjustment Act of 1974.
10.	Job Corps payments.
11.	U.S. Housing and Urban Development (HUD) rental assistance subsidies.
12.	Stipends received in the following programs: VISTA, Peace Corps, Foster Grandparent Program, YouthWorks/AmeriCorps Programs and Retired Senior Volunteer Program.
13.	Any federal statute that specifically provides that income or payments received under the statute shall be excluded in determining eligibility for the level of benefits received under any other federal statute.

## Attachment B

### Enrolling a Client in the Federal EcSA Program

First, ensure that 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".



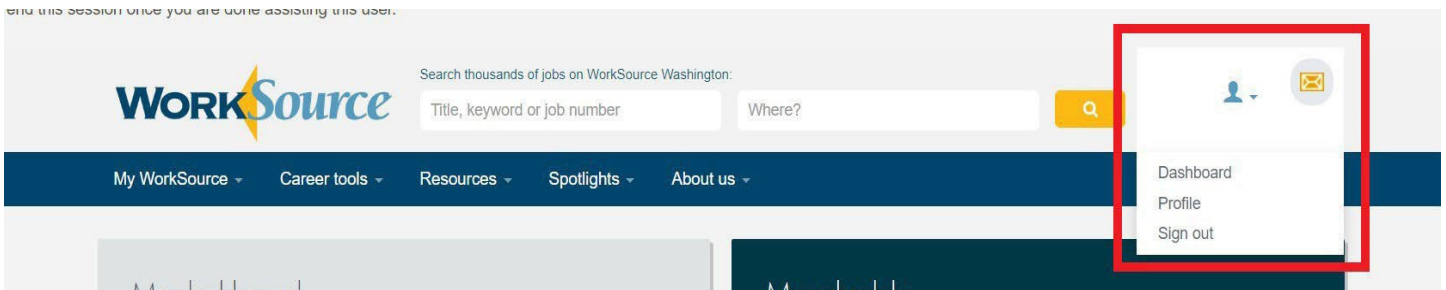
- If they do not have an account on WorkSourceWA.com, you will get the following message:

**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](https://my.worksourcewa.com) to complete their registration. Please close this window and return back to ETO.

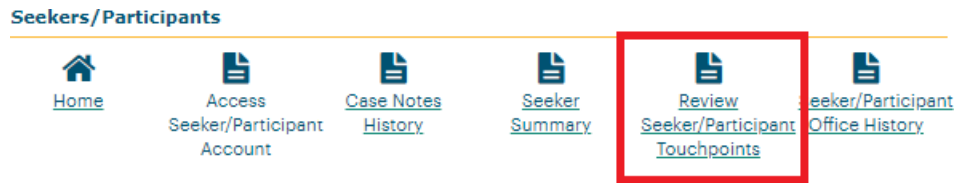
- If they do have an account, you will need to ensure that their profile is filled out fully. You can reach the profile by clicking on the person in the upper right corner of the page, and clicking "profile." You then ensure that every field is filled. Some clients selected "no" on the question "would 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.



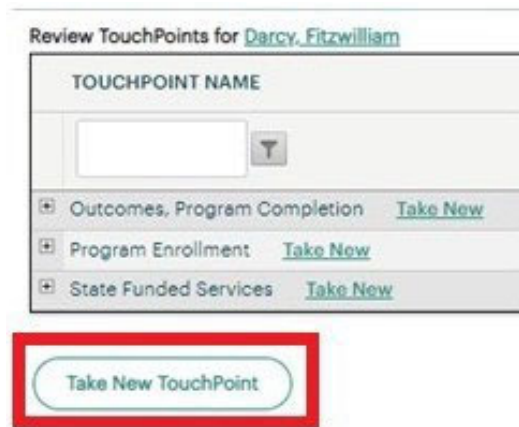
- Once you have verified that their profile is filled out in full, you will then move on to fill out the WIOA Eligibility Application
  - Case managers must follow local policy concerning the entry of a new WIOA Eligibility Application if a WIOA Eligibility Application for a currently active program is already present.



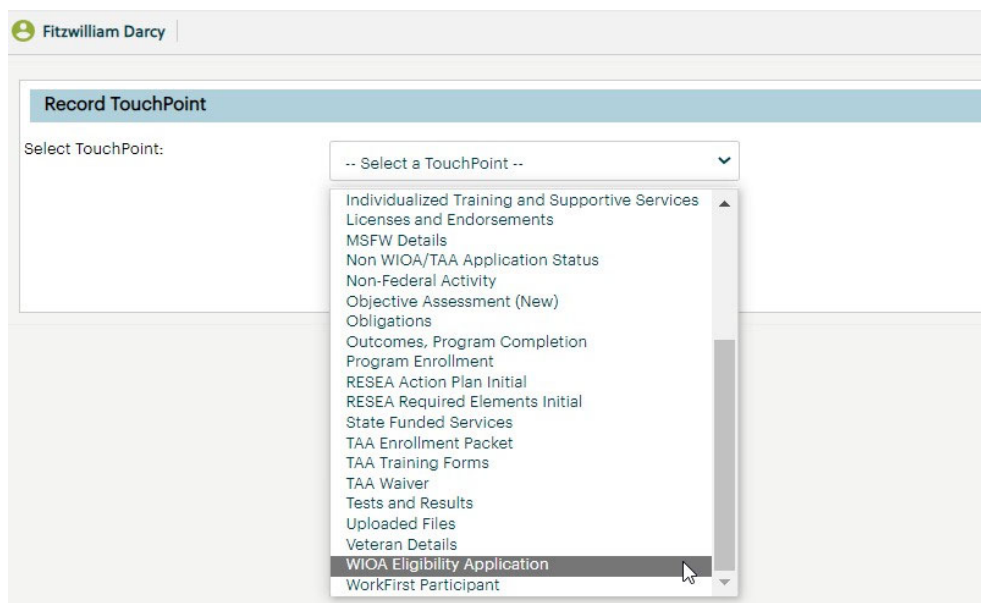
- If they do not yet have a WIOA Eligibility Application taken, you will start by selecting “Review Seeker/Participant Touchpoints” from the client’s dashboard:



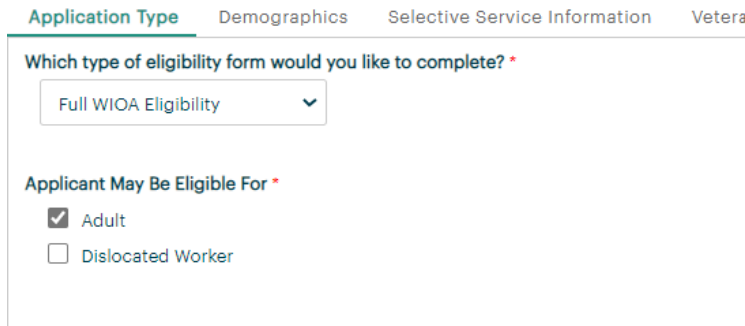
- From this menu, select “Take New Touchpoint” from the bottom of the list.



- Select “WIOA Eligibility Application” from the dropdown list



- Select “Full WIOA Eligibility” from the dropdown menu, and select “Adult.” If the participant also may fit into Dislocated Worker or Youth, you may select those options as well.



Application Type Demographics Selective Service Information Veterans

Which type of eligibility form would you like to complete? \*

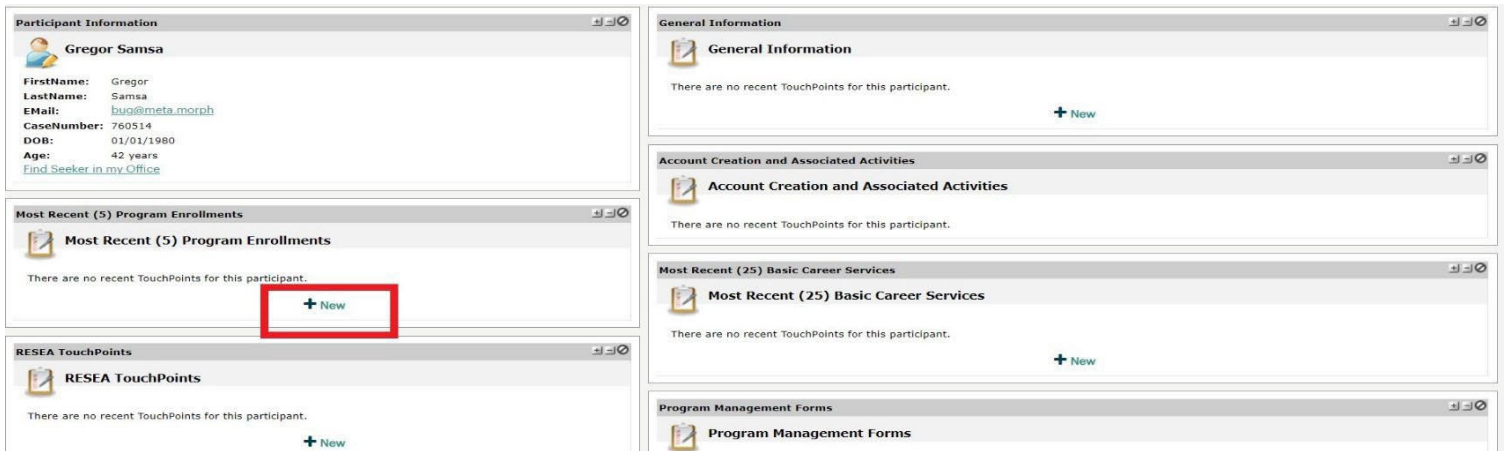
Full WIOA Eligibility

Applicant May Be Eligible For \*

Adult

Dislocated Worker

- Fill out each of the tabs in the WIOA Eligibility Application fully, ensuring that all necessary information is included.
  - Remember that the income standard for the WIOA Adult program is typically lower than the requirement for the EcSA program, so it is possible to have a participant who is eligible for the EcSA program, but who would warrant a response of “No” for the question regarding whether a participant is low-income. Take care to fill out the form and case note accordingly.
- Once you’ve ensured that their account is fully completed and a WIOA Eligibility Application has been taken, you can begin the enrollment process. From the client dashboard, select “new” in the area titled “Most Recent Program Enrollments”.



Participant Information Gregor Samsa

FirstName: Gregor  
 LastName: Samsa  
 EMail: [bug@meta.morph](mailto:bug@meta.morph)  
 CaseNumber: 760514  
 DOB: 01/01/1980  
 Age: 42 years  
[Find Seeker in my Office](#)

General Information

There are no recent TouchPoints for this participant. + New

Account Creation and Associated Activities

There are no recent TouchPoints for this participant. + New

Most Recent (25) Basic Career Services

There are no recent TouchPoints for this participant. + New

Program Management Forms

There are no recent TouchPoints for this participant. + New

Most Recent (5) Program Enrollments

There are no recent TouchPoints for this participant. + New

RESEA TouchPoints

There are no recent TouchPoints for this participant. + New

- Select the program “Economic Security for All,” and then answer the question that populates “Household income greater than 200% of the Federal Poverty Level” with either a yes or no, depending on their income status.

Review the seeker's personal data on the Demographics at Enrollment Tab. If needed, impersonate the seeker and use their Job Match ;

Program of Enrollment \*

Economic Security for All (EcSA) ▼

Household income greater than 200% of Federal Poverty Level \*

Yes

No

- Fill out the other items on the Program Enrollment form and save.

### **How to Track an EcSA Career Plan**

- In order to complete a Federal 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 Federal EcSA is “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 Federal 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 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 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 data that is available from the period requested. For this reason, multiple report pulls for especially long date ranges are therefore recommended.

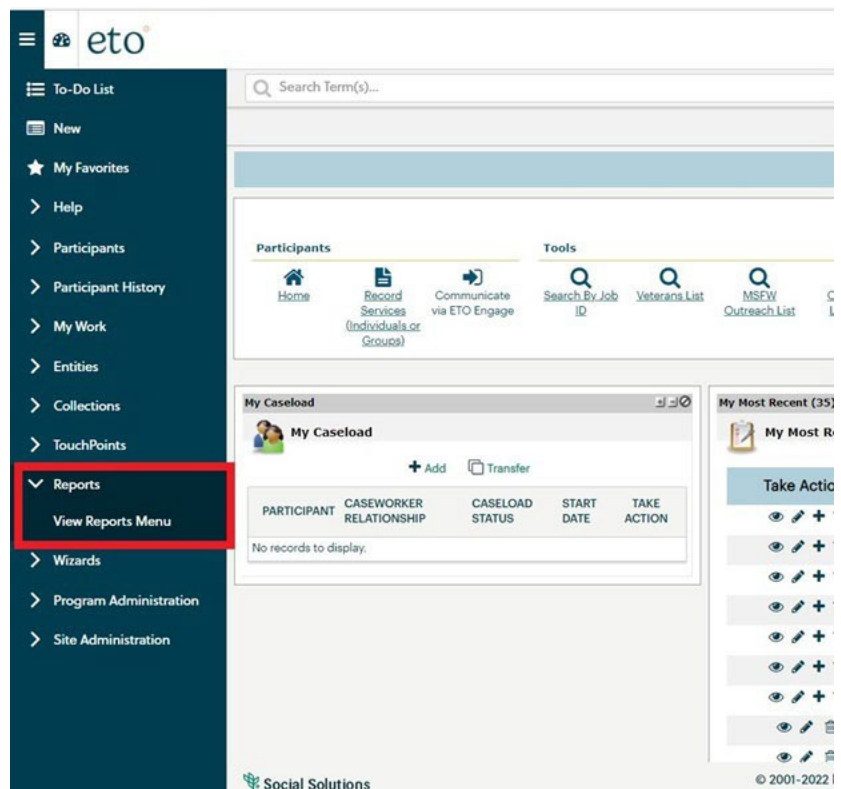
### Suggested Reports:

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

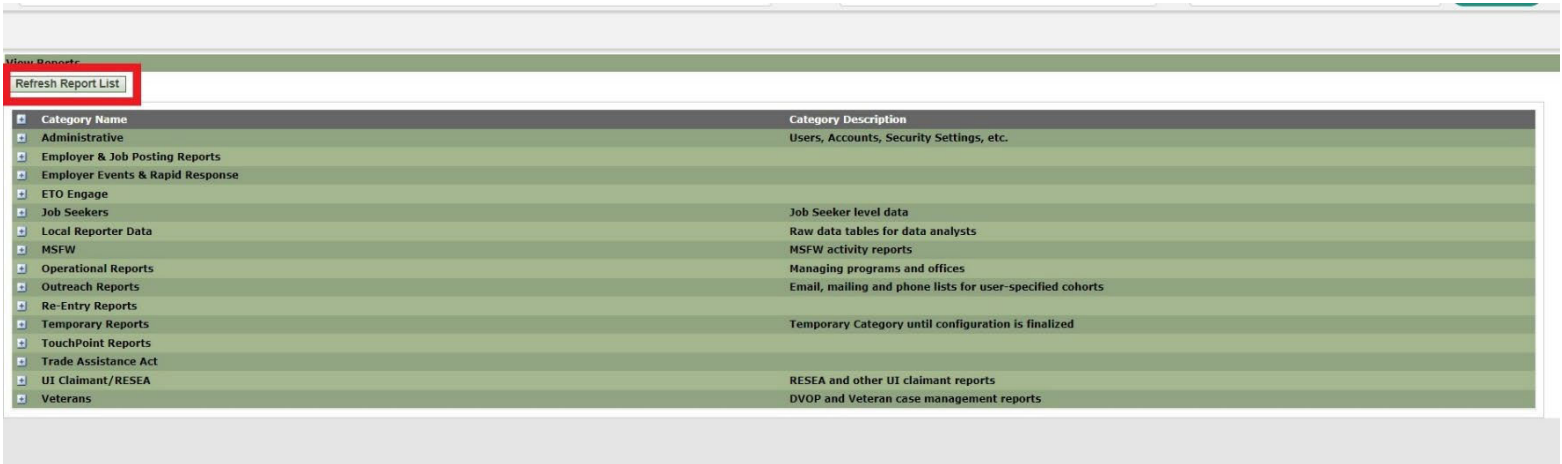
### Getting Started

- 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



The screenshot displays the ETO system interface. On the left is a dark blue navigation sidebar with a hamburger menu icon at the top. The sidebar contains the following items: To-Do List, New, My Favorites, Help, Participants, Participant History, My Work, Entities, Collections, TouchPoints, Reports (highlighted with a red box), View Reports Menu (also highlighted with a red box), Wizards, Program Administration, and Site Administration. The main content area features a search bar at the top with the text "Search Term(s)...". Below the search bar are sections for "Participants" and "Tools". The "Participants" section includes icons for Home, Record Services (Individuals or Groups), and Communicate via ETO Engage. The "Tools" section includes icons for Search By Job ID, Veterans List, and MSFW Outreach List. Below these sections is a "My Caseload" panel with a table header: PARTICIPANT, CASEWORKER RELATIONSHIP, CASELOAD STATUS, START DATE, and TAKE ACTION. The table currently shows "No records to display." To the right of the "My Caseload" panel is a "My Most Recent (35)" section with a "Take Action" button and a list of icons for managing records. The footer of the page includes the Social Solutions logo and the copyright notice "© 2001-2022".

- 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

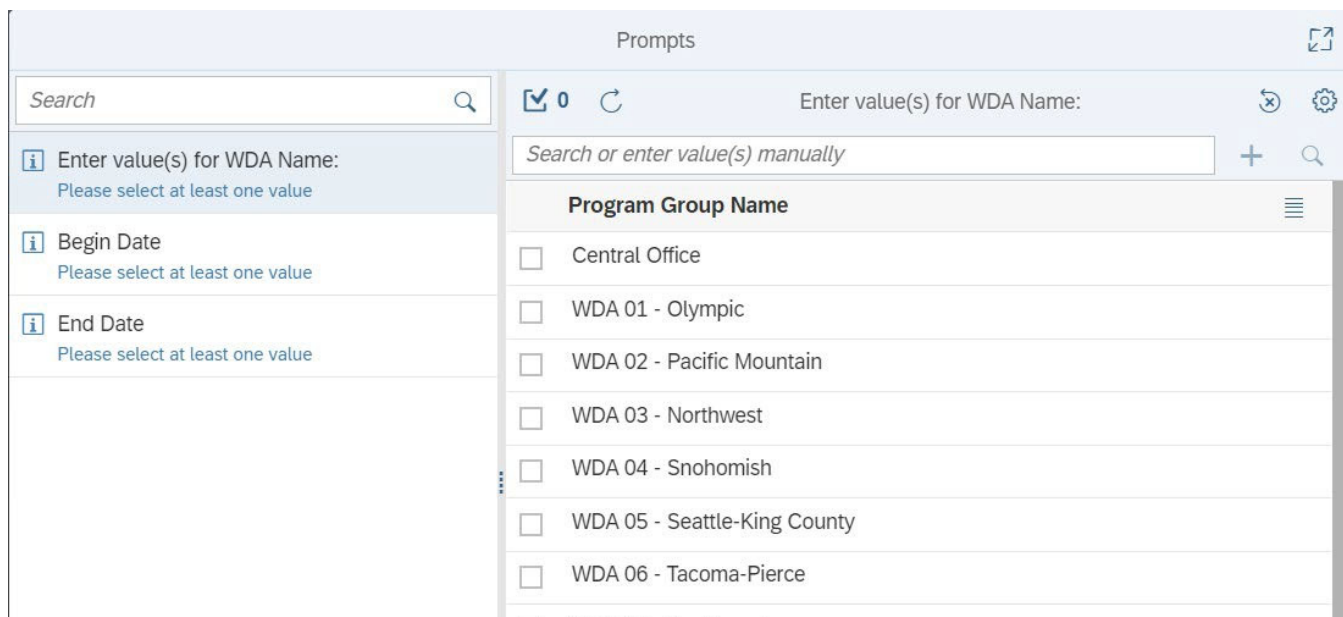


- Administrative Report
  - Staff Created Participants



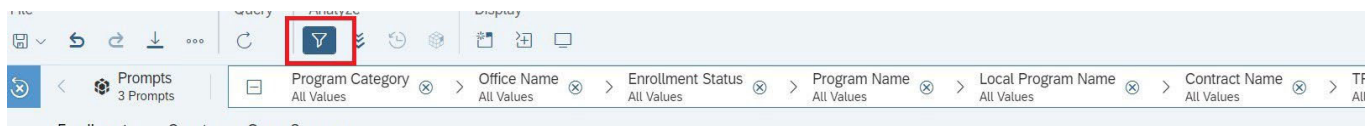
### Selecting Data:

- 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.



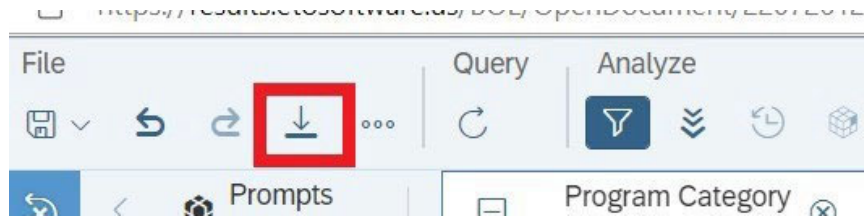
### Navigating the Report

- 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.

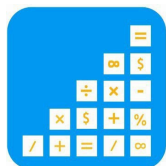


## Exporting to Excel

- 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. If you have difficulty, try using Edge.



## Self-Sufficiency Calculator Step-By-Step Guide to Saving Customer Information

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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](http://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.

## **Updates to the Calculator as of January 25, 2024**

### **Multiple Program Selection has been added.**

- a. This will help us capture all the programs the participants are co-enrolled into.
- b. Use the SHIFT/CTRL keys to select all at the time of enrollment and/or input into the calculator.

### **Wage Progression Function has been added.**

- c. This is used to capture the self-sufficiency journey each participant is on, as it will allow case managers to:
  - i. Input any “survival jobs” taken while they are working towards their goals.
  - ii. Make changes to the family composition (i.e., family size, ages, etc.) that have occurred after time of enrollment.
  - iii. Make any other changes to benefits, family income, expenses, etc.
- d. Continue to use the “Edit” function to correct any errors at the time of registration, or when exiting the participant.

### **Visual Cues and Prompts have been added.**

- e. This was created to reduce the chances of unintentional changes.

### **Wage Progression Data has been added to the Final Report.**

- f. This is intended to show each participant’s journey to self-sufficiency.

### **Trouble Ticket System has been created.**

- g. Tickets will be handled by the Workforce Development Council of Seattle-King County or IT, depending on the issue.
- h. Case managers and Admin will be able to view open/closed tickets.

### **New Reports are available.**

- i. Includes Income Adequacy
- j. Can select multiple programs as well.

### **Client Demographics Screen has been added.**

- k. This is to be used primarily for reporting.