Employment History and Contact Record

Battle Creek Community-Wide Non-Profit Database

Prepared and managed by Goodwill Industries of Central Michigan's Heartland

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Introduction

This chapter details the procedures for all programs and agencies to enter information from any update contact with a participant, including program follow-ups and new employment information, in ETO. As with every chapter, this one will take a dual-scope approach, starting with a conceptual view for those of us who learn better by knowing how things work and why we do them, and then there will be a Step-by-Step section detailing every step of the process including what kind of answers are expected and accepted. If you want to skip to the process details, and make this as short and simple as I'm able to make it, you might want to skip to the Step-by-Step section beginning on page 16.

This TouchPoint was designed to replace the previous, single form TouchPoint, "PPU (Periodic Participant Update)". The "PPU" was a flawed TouchPoint, made into a single form to eliminate a security issue, the single form made it impossible to link termination data from the specific employer. To do this required a two-part, Parent/Child (Main and Sub-form) TouchPoint with termination data recorded in the Parent.

To solve the security issue that plagued the old PPU and other employment TouchPoints, a new program was created in ETO, *Employment*, and the new TouchPoint, "Employment History" can only be recorded or edited in that program. This allows all users, regardless of their agency or other program access, to be able to view and edit all records as needed.

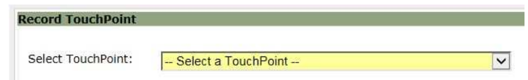
For an overview of two-part, Parent/Child, TouchPoints and how they work, see the chapter on this topic (ETO TouchPoints with Sub Form Instructions).

Employment History TouchPoint Details

Main Form/Sub Form Process

Main (Parent) Form

The first step must always be to record the parent/main TouchPoint. While you can still select the TouchPoint from the Select TouchPoint list box, Under Record TouchPoints on the Navigation menu or the Participant's View / Record TouchPoints page ("Employment History" in this case), the best way is through the Participant's dashboard.



When in the *Employment* program, every Participant will have a section near the top of their dashboard that displays key data from the Employment History TouchPoint (more on this later-see page 14-15), whether they have one previously recorded or not. Near the bottom-center of this dashboard part is a link to create a new TouchPoint.

To start a new Parent TouchPoint, click the + New link.

> Keep in mind you may need to enroll the Participant you are working with into *Employment* if they have no previous Employment History TouchPoints recorded.

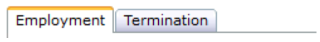
The questions on this parent TouchPoint are the most basic information known at the start of a new job. Consider the data recorded in the Parent as that information about a period of employment that never changes, such as the employer name, data of hire, and termination date. Data points such as job title and rate of pay are subject to change with promotions and pay raises, so they will be recorded in the Child form where we can track such changes.

> *Set the Date Taken for the Parent as the Hire Date to be consistent with the period of employment, keeping the list sorted by date and the Employers showing consistently in any list you view*

The Date Taken field at the very top of the Parent form will be blank by default. Best practice here is to enter the hire date for the date taken. The reason will be explained further in the section on the dashboard, but this will force the view tables to sort the jobs and periods of unemployment in the correct order for the Participants. There will be a message at the top of the TouchPoint form to help you remember this.

At the top of the form is a Staff Attribution field allowing other staff members to record or edit TouchPoints and still give proper attribution to the case worker responsible for the Participant. You cannot enter your own name in this field, and the field cannot be made required, but you can find any user with access to the program in the dropdown list-box. Select the correct staff name, if recording for another user, and either tab into or click the next field.

First Page: Employment

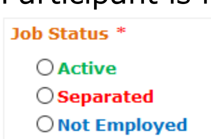


The first actual field in the TouchPoint is important for reporting purposes.

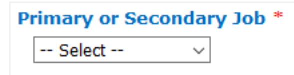
<u>Programs Enrolled</u> is a list question that allows you to check your program, and more than one program can be checked at one time. This is important for reporting purposes, and equally important to record one last contact record and ***uncheck*** the box for your program with that entry. This will effectively "unenroll" them and keep them from adversely affecting your agency's outcomes. Any fields that 'disappear' will retain their data. This is a required field.

Although you are not required to, this TouchPoint was designed to allow users to record historical employment information—jobs worked before the Participant entered your program—so you have this information on record. The next part of the TouchPoint is a simple checkbox that flags the record as "Pre-Program History", making it possible to separate those records from employment gained and lost while *in* program. As it's a single option checkbox, it is not required.

The next field is also required: <u>Job Status</u>. This field has multiple purposes. First and primary is to allow us to record contact records when the Participant is not employed. This, in effect, creates a period of *'employment'* where their employer is nonexistent. The second purpose is much less important, though helpful, allowing you to see at a glance in the view table what the status of a particular employment is. The third reason is important in that selecting "Separated" activates the Termination page and its associated questions, allowing you to record termination information.

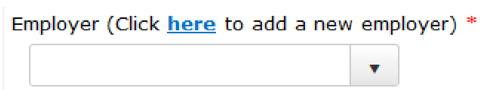


We can still enter second and third jobs with this TouchPoint, something that was added with the old PPU TouchPoint, with the Primary or Secondary Job field that comes next. This is a required field, so you must choose one of the three options, even if it's their only job: "Primary (First) Job", "Second Job", or "Third Job".

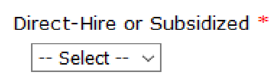


> For Temporary Employment services, do no create new Entities for each work site. There should only be one Entity per temp service, and the work assignment location should be recorded in the new location field.

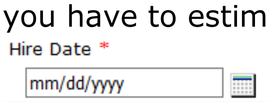
The next question, the most key question, comes next: Employer. You'll be able to select an employer from a list of enrolled Entities that are classified as employers. This list should also include all employer entities set as "Enterprise Level", no matter what programs they are assigned to. For employers that are Temp Services, you will be able to show the assignment location from another Entity employer list in the Child form (as that is subject to change). If an employer is not listed then you can add them (or enroll an existing Entity that's not assigned to your program) as an Entity. See the chapter "*Working with Entities*" for detailed information on adding and managing Entities in ETO. Part of the field name includes a link to the **Add Entity** page that will open in a separate tab where you can add the new entity. Once saved and the tab is closed, the Employer should automatically appear in the list without having to leave the TouchPoint form.

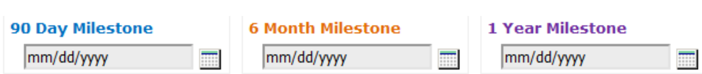


Another required field is next, where you tell us if the job is direct hire (employer paid) or subsidized (Agency paid).



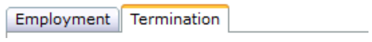
Last on the First Page is the Hire Date. This is also a required field, even if you have to estimate the start date, and should be the first day with this new employer. Once this is entered, ETO will automatically calculate and display the dates when the Participant, if they remain with this employer, reach a 90 Day, 6 Month, and 1 Year Milestone.



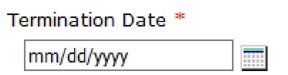


The page ends with two reminder messages to immediately record a sub form (Child) to go with the main form (Parent). Never record *only* a main form without also recording a sub form. Think of it like this: *Without a Child, you cannot be a Parent*.

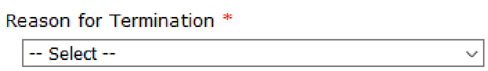
Termination Page



If "Separated" is selected as the answer for the Job Status question on the first page, the **Termination Page** will appear automatically. You can navigate to the page by tabbing to the "Next Page" button at the bottom of the form and hitting the <Enter> key, clicking on the "Next Page" button, or by clicking the "Termination" tab at the top of the form.



The first field is the Termination Date. This required, even if you have to estimate (if you do estimate, put an explanation in the Termination Notes). This is, of course, the last day of this employment.



The Reason for Termination is required and most answers will trigger other questions to appear, prompting you for a complete explanation of the separation. This field is a dropdown list box with a large set of options that are subject to change as needs come and go. Many of the answers will ask for factors or reasons for the answer given. For every question where "Other" is given as an answer, a text field will appear requiring explanation. For some answers, such as "Laid Off – Lack of Work" or "COVID-19" will prompt to you to tell if it's a temporary or permanent separation.

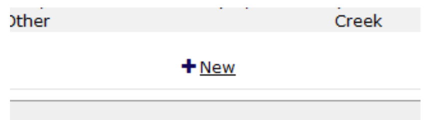
The page ends with Termination Notes, an optional field for recording any pertinent information regarding the separation from this employment.

Sub (Child) Form

Form and Function

The Child form serves a number of functions: Employment Retention Verification, Follow-Up or other contact documentation, and detailed Employment data recording. All of this being done in one form makes this a very complex TouchPoint and to simplify its use for the user, a number of pre-programmed functions appear as different answers are given to questions throughout the form.

The only way to begin recording a new Child form is from the Parent TouchPoint dashboard. From there, click on the +New link at the bottom-center of the Child form section.



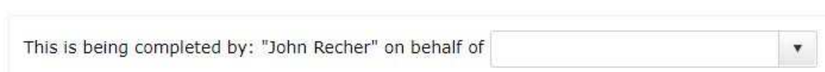
Pages in the TouchPoint

Contact Record

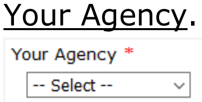
There are four possible pages on the Child form. The first page, "**Contact Record**" is for recording the basics about the contact that resulted in the TouchPoint being recorded. Even if the purpose of this specific TouchPoint is to record new employment information, you still had to obtain the information in some manner, meaning contact of some form with an individual or agency to receive the information. So, you will always have data to record on this page.

The Date Taken on the Child form should be the actual date of contact. The field is blank by default, so you will have to enter a date to save the record.

There is also a Staff Attribution field at the top if the Child form just like on the Parent form, allowing other staff members to record or edit TouchPoints and still give proper attribution to the case worker responsible for the Participant. You cannot enter your own name in this field, and the field cannot be made required, but you can find any user with access to the program in the dropdown list-box. Select the correct staff name, if recording for another user, and either tab into or click into the next field.

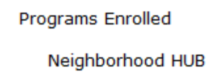


Your Agency. The first question asks you to identify which Partner Agency you are with. This is necessary because the TouchPoint can only be recorded or edited from within the *Employment*

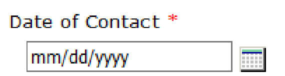


program and so there is no way to identify the agency as with other TouchPoints recorded from within Partner Agency programs in ETO.

Programs Enrolled. This field displays the current value to the same question on the Parent form. This is informational for the user recording the TouchPoint and cannot be changed from within the Child form. To change the value, you will have to go to the Parent and check or uncheck your agency as is appropriate.



Date of Contact. As this will normally match the Date Taken field at the top, it will be removed from the TouchPoint in the near future. If it's still on the form, set this date as the date you either had contact with the Participant or that you received the information you're about to record.



Other questions on this page you will be required to answer are Contact Interval, Contact Method, and Time Spent During Contact. See the Step-by-Step section later in the chapter for a complete description of each field, including the purpose and how best to answer.

For agencies that need to use the TouchPoint to record unsuccessful attempts to contact, there is a checkbox to indicate this kind of record on this page. Checking the box will automatically hide any irrelevant questions and pages that follow and allow you to record three dates on which attempts to contact were made. This is not a requirement for all agencies, but is available for those agencies that do require it for their staff. If your agency does not require it, you can still use it if desired.

There is also a general Notes field where you can record any comments or pertinent information not recorded anywhere else in the TouchPoint.

Continuing Education

When "KCC iACT" is selected for the Programs Enrolled question on the Parent form, it will display as at least part of the same field on the *Contact Record* page. When this is true, a second page, *Continuing Education*, will automatically appear on the form to record required information regarding the Participant's enrolling in other educational programs following the completion of iACT. Initially, there is only one question on this page: Have You Enrolled in any Other Educational Program Following iACT Completion?. This is a simple Yes/No question and will usually be answered with "No". It will also remember the last value recorded in previous TouchPoints to keep the answers consistent. If you don't know the answer, check "No" (it only has to be answered “Yes” once to trigger the outcome goal and can be answered affirmatively at any time in a future contact record.

Answering “Yes” will then trigger new questions to appear: Is Continued Educational Program at KCC or at another Educational Institution?, Non-KCC Program Name, and Non-KCC Institution Name. See the Step-by-Step section later in the chapter for detailed explanations of each field and their actions.

Employment Retention Verification

The *Employment Retention Verification* page is a simplified adaptation of the same function from the PPU. Although there is basically only one question on this page, Current Employment Status, it may be somewhat difficult to answer. A detailed explanation of the options to answer this question are listed in the Ste-by-Step portion of this chapter. Best practice is simply to select the answer that best applies to the Participant’s employment situation.

Current Employment Status can be complicated because of the different purposes in the various options. The first option on the list, “Pre-Program Historical Employment” is for employment records not specifically associated with a contact—other than initial intake—to make a complete record of the Participant’s employment history, specifically jobs held before entering your program.

The second option, “Employed at Program Entry”, is for those Participants whose job you’re recording when that job was already held at the time they entered your program.

There is also “New Employment-Previous Unemployed”. This will only be used once per employment, obviously the very first time the TouchPoint is recorded for a specific period of employment.

The option we hope to be using the most, “Still with the same employer from last contact”, doesn’t need an explanation. If you’re making a new contact record and the Participant is still at the previous employer, regardless of any changes that may have occurred there, this is the best choice.

We do have some Participants who work second jobs, and third jobs may be possible at some point, so it’s good practice to make a record of those jobs to get a complete picture of the Participant’s work history. This was something that was first made possible with the PPU, though it also broke the relationship between the employers and termination data. For this TouchPoint, select “Still with Previous Employer, but Taking 2nd or 3rd Job” for this kind of record. This is opposed to “New Employment-Previously

Unemployed" because the Participant is not unemployed, but needs to be separated somehow from other employment. There is a field on the Parent form, Primary or Secondary Job, that needs to be set to the appropriate choice together with this.

Similar in nature, there are going to be times when the Participants change jobs but remain employed within the 30-day standard margin of consistency. In this case, the best choice is "Employed, but not with the same Employer-New Employment". This is used only in the first Child form of a new Parent starting a record for a new period with a new Employer.

When the Participant has lost or quit their job since the last contact and has not yet secured new employment, a new Parent record should be started with the Job Status set as "Not Employed", and for this field select "Separated from last employer since last contact (newly unemployed)".

As there will periods of continued employment with the same employer, there will also be long periods of **un**employment. In this case, the most recent parent should be a "Not Employed" Job Status and the Current Employment Status on the Child form should be "Not currently employed-Continued from last contact".

Finally, on the unusual chance that none of the above choices fit, you have the choice to select "Other". Use this sparingly, and when you do a required new text field, Explain Other Employment Status will appear for you to explain the choice.

Employment Details

The *Employment Details* questions will only appear if you indicate the Participant is currently employed (the page *may* still appear, otherwise, but nothing will be on it). On this page you will record the details of the Participant's employment, and those who've used the PPU should find it very similar to that TouchPoint's *Employment Data* page.

After a few fields automatically displaying the Job Status, Employer, and Hire Date, you will be able to list the job Assignment Location for those whose employer is a temp service. This is a dropdown list box of Employment Entities, and a button to add a new Entity is on the form at the end of the field name. This will open a new tab and go straight to the Add Entity page where you can add a new Employer Entity quick and easy without leaving the TouchPoint you are recording (see the Step-by-Step section for further on this feature).

Another required field records the Participant's Job Title. This is a free text field allowing you to enter anything up to 50 characters.

You'll also be required to show the Industry Code (NAICS) for the Participant's job, Part-Time/Full-Time Status, Estimated Number of Hours they will work per week, Hourly Wage, whether they are enrolled in an Employer Medical plan, or if they are enrolled in a company retirement plan.

At the bottom of the page are three automatic, calculated fields that show an estimated Weekly, Monthly, and Annual Gross Pay based on the Hourly Wage and Hours per Week.

View Table on Participant Dashboards

The very best way to work with this TouchPoint is through the Participant's dashboard. Although you still access the TouchPoint in all the usual ways, the Participant dashboards have been set up with a section to display and work specifically with this one TouchPoint. The Participant dashboard shows only the data from the Parent TouchPoint.

Employment Record

Employment Record

Take Action	Dashboard	Status	Date Completed	Date Last Updated	Last Updated By	Attributed Staff Name	Programs Enrolled	Historical	Job Status	Job	Employer	Hire Date	Term Date
	Employment History Dashboard		5/13/2019	12/16/2020	Treadwell Consultants		Neighborhood HUB|Work Hardening		Not Employed	Primary (First) Job	ePaint Recycling LLC	5/10/2019	7/8/2019
	Employment History Dashboard		4/15/2019	12/16/2020	Treadwell Consultants		Neighborhood HUB|Work Hardening		Not Employed	Primary (First) Job	Goodwill Industries of Central Michigan's Heartland, Inc (GICMH)	4/15/2019	5/10/2019

+ New

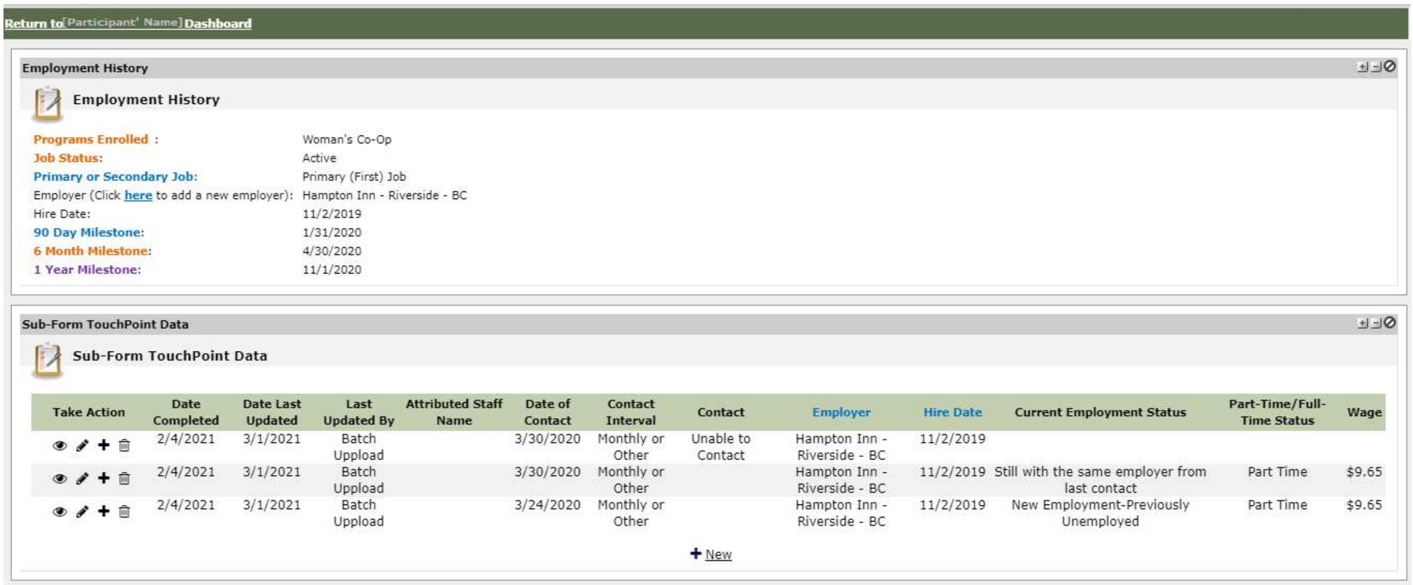
Most of the data from the TouchPoint displays on this view table, including the Date Taken (Completed), Date Last Updated, Attributed Staff Name, Programs Enrolled, Historical, Job Status, Job (Primary, 2nd, or 3rd job), Employer, Hire Date, and Term(ination) Date.

Dashboard
Employment History Dashboard
Employment History Dashboard

The **Dashboard** column—always the second column, following the **Take Action** column—will contain a link to the TouchPoint dashboard for that one Parent TouchPoint form. Click on that link, and ETO will take you to the TouchPoint dashboard where you can see another custom view table of the Child TouchPoint, as well as start new Child TouchPoints.

The real power advantage of using the Participant dashboard is the simple ability to switch back and forth between the dashboards without needing to start from scratch as is required when using the Participant's **Review TouchPoints** page. In the top left corner of the TouchPoint dashboard is a link (**Return to** [Participant Name]**'s Dashboard**) that will take you right back to the Participant dashboard where you can immediately click on a TouchPoint dashboard link again. This functionality, again, allows you easily and quickly go back and forth without losing time or work.

The TouchPoint dashboard consists of two panes. For the *Employment History* TouchPoint, the Parent summary pane is on top. This was selected to allow the maximum amount of room for the Child view table to display all the data we want to see in that table.


Return to [Participant' Name] Dashboard

Employment History

Employment History

Programs Enrolled : Woman's Co-Op
Job Status: Active
Primary or Secondary Job: Primary (First) Job
Employer (Click here to add a new employer): Hampton Inn - Riverside - BC
Hire Date: 11/2/2019
90 Day Milestone: 1/31/2020
6 Month Milestone: 4/30/2020
1 Year Milestone: 11/1/2020

Sub-Form TouchPoint Data

Sub-Form TouchPoint Data

Take Action	Date Completed	Date Last Updated	Last Updated By	Attributed Staff Name	Date of Contact	Contact Interval	Contact	Employer	Hire Date	Current Employment Status	Part-Time/Full-Time Status	Wage
	2/4/2021	3/1/2021	Batch Uppload		3/30/2020	Monthly or Other	Unable to Contact	Hampton Inn - Riverside - BC	11/2/2019			
	2/4/2021	3/1/2021	Batch Uppload		3/30/2020	Monthly or Other		Hampton Inn - Riverside - BC	11/2/2019	Still with the same employer from last contact	Part Time	$9.65
	2/4/2021	3/1/2021	Batch Uppload		3/24/2020	Monthly or Other		Hampton Inn - Riverside - BC	11/2/2019	New Employment-Previously Unemployed	Part Time	$9.65

+ New

The top—Parent summary—pane shows all the fields that were answered in the Parent TouchPoint. It will only display fields with answers—null fields do not appear in the summary at all. This enables you to be sure you are working with the correct TouchPoint and employer.

The lower pane (you may need to scroll down to see it fully), **Sub-Form TouchPoint Data**, displays the key data in thirteen columns. The first column is always the **Take Action** column with various icons to View, Edit, Add New, or Delete, each of which may or may not be visible based on your level of access. The other columns include **Date Completed** (Date Taken), **Date Last Updated**, **Last Updated By** (User Name), and **Attributed Staff Name**. We've also included fields normally not available in a View Table taken directly from the TouchPoints: **Date of Contact**, **Contact Interval**, **Contact**, **Employer**, **Hire Date**, **Current Employment Status**, **Part-Time/Full-Time Status**, and **Wage**.

> **Important Note:** Remember, you can very easily switch from the TouchPoint Dashboard back to the Participant Dashboard by clicking the link—including the Participant's Name—in the upper left corner of the dashboard. This will allow you to quickly and easily switch back and forth between various TouchPoints and their dashboards without having to search for the Participant and going through their **Review TouchPoints** page.

Step-by-Step Instructions

The following instructions will describe each field in the TouchPoint including: Type of field with data requirements (text in green), purpose of the field, conditional effects, if it automatically remembers the last value recorded (orange text), and whether it is a required field or optional (required fields are notified in red text). Fields that are said to be 'optional' should not be taken to mean they are not necessary or do not need to be filled out. *For the sake of producing good reports, fill out all fields to the best of your ability; do not skip any because you don't think they are important.* This only means that entry of the TouchPoint will not be held up if the question is not answered.

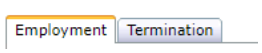
Record New TouchPoint – Employment History Parent

1. Navigate to the *Employment* program in ETO. Employment History Parent and Child forms can only be initially recorded ***or*** edited from this program, though they and their data can be viewed from most other programs.

2. Using the process most familiar to you, get to the Participant's dashboard. Locate the "**Employment History and Contact Record**" section near the top of the dashboard. Even if no Parent TouchPoints have been recorded for this Participant, you can still click on the **+**New link at the bottom center of the section. This will immediately open a new, blank TouchPoint.

3. Complete the form as completely as possible. Many of the questions are required and the details below will tell which ones are required and which ones are optional.

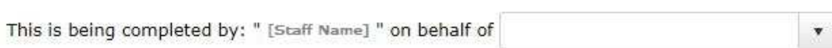
Employment Page



Date Taken: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This date

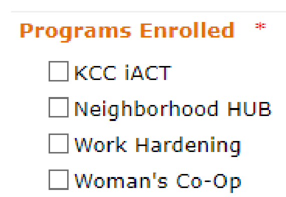
will be blank by default for this TouchPoint. Use the Hire Date for Date Taken to force proper sorting for multiple jobs for each Participant in the view table. Enter the correct date directly into the date box, or use the calendar tool to select the date. *TouchPoints will be sorted in ETO based on this date, so make it consistent with the period of employment recorded within so your TouchPoint falls in the appropriate place on the list. This is a required field*.

<u>Staff Attribution</u> (Not shown on the form by this name): This is an exclusive choice (can choose only one) dropdown list box containing a list of all ETO Users with access to the program. This field allows you to have another staff member record or edit TouchPoints for you while



still giving "credit" to the person with responsibility over the Participant. You cannot select your own name, so this field cannot be required. *If recording for another staff member, or editing someone else's TouchPoint, select their name from the list. This is an optional field*.

<u>Programs Enrolled</u>: This is a non-exclusive choice (can choose more than one) option group with pre-selected choices for possible Agency Program names: "KCC iACT", "Neighborhood HUB", "Work Hardening", and "Woman's Co-Op".



The answer should be the name of the Partner Agency Program the participant is or was a part of, not the Agency completing the follow-up (unless it's the same). Check and uncheck your agency only. You should also ***uncheck*** your agency when recording the last contact with the Participant when dismissing them from your program. Select the correct program name from the list. *This is a required field*.

<u>Pre-Program History</u>: This is a single checkbox to indicate that the employment recorded in the TouchPoint began and ended before the Participant. It may be beneficial to your Participant efforts to record a

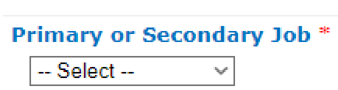
complete work history, including jobs they worked before entering your program. Flagging those jobs with this checkbox will enable us to keep them separate from the jobs acquired through your program. *Because it's a single checkbox, it cannot be required.*

*The Job Status "Not Employed" should __never__ be used in connection with an employer, but is only to be used __**instead**__ of an employer to record a period of unemployment for the Participant.*

Job Status: This is an exclusive choice (can choose only one) option group with a pre-selected set of choices for the status of this employment, "Active", Separated", and "Not Employed". Job Status is a key question that will display on the View Table and also will trigger underlying programming in the TouchPoint. If the employment is current—the Participant has been hired and continues to work there—select "Active". If the employment has been terminated for any reason and they are separated from that employer for that period of employment, select "Separated". If you are beginning to record a period of unemployment, select "Not Employed". It is important not to confuse "Separated" and "Not Employed" with each other as they have very different roles. "Not Employed" should never be used with an employer, but is used ***instead*** of an employer, and only when the Participant has been unemployed for more than 30 days. Your selection will also trigger TouchPoint programming to make other pages and fields appear or disappear. You must select "Separated" to record termination information, as the Termination Page will only appear when this selection has been made. *Click the radio button next to the appropriate choice to select. This is a required field*.

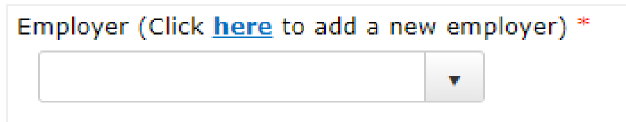
Try not to use "Not Employed" unless the Participant has been out of work for more than 30 days.

Primary or Secondary Job: This is an exclusive choice (can choose only one) drop-down list box listing three choices: "Primary (First) Job", "Second Job", and "Third Job". This empowers you to record second and third jobs while still keeping them tied to termination information when it applies. Second and third jobs should be recorded in new and separate Parent TouchPoints. The record of the contact when you learned of one of these jobs should be recorded in the Child form. There is no need to ***also*** record a sub-form under the Primary job, though it is okay to do so. The Primary job will remain Active. Also, notice that you can see at a glance in the Parent TouchPoint's View Table (on the Participant dashboard) that the Participant has second and third jobs, and what jobs as still active. This gives you an



indication what to ask about, in terms of employment, when making contact. *Select the appropriate choice from the list box. This is a required field*.

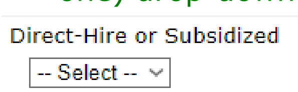
Employer: This is an exclusive choice (can choose only one) drop-down list box with choices taken directly from the Entities table, having the Type of "Employer" assigned. ETO should list all employers assigned to your program in the database *as well as those who are set as "Enterprise Level" Entities.*

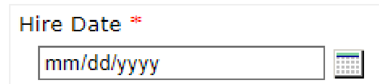


If your employer is not listed, you will need to add a new entity, or assign an existing entity to your program if one already exists but is not visible in this list box. See the chapter on Working with Entities *for information on this task. To make this task easier, there is a link following the field name: (Click HERE to add a new employer). At the time of this writing, the link did not cause the mouse cursor to change appearance, making it seem like an inactive link, but clicking where it says HERE will open a new browser tab in the* ***Add Entity*** *page. There you can add a new Entity (please make every effort to be sure you are not duplicating Entities, and follow all naming and addressing conventions). When creating new Employer Entities, check the "Enterprise Level" checkbox immediately below the "Entity Notes" textbox to make it available to everyone. Once you've added the new Entity, close the browser tab and the new Employer should be in the dropdown list in your TouchPoint without having had to leave it.*

Select the correct Employer from the list. *This is a required field*.

Direct-Hire or Subsidized: This is an exclusive choice (can choose only one) drop-down list box listing two choices: "Direct-Hire" and "Subsidized". This flags jobs that are paid by one of the Partner Agencies to separate them from more permanent jobs acquired by the Participant. The best answer to this question is dictated by where the Participant's paycheck comes from. If the employer listed above is paying the wages, then the answer should be "Direct-Hire", even if the job was secured by and through the Partner Agency Program. If they are being paid by one of the Partner Agencies, then the answer should be "Subsidized". *Select the appropriate choice from the list box*. *This is a required field*.

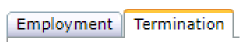




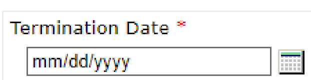
Hire Date: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. Type the date the participant was hired (typically the starting date for employment) directly into the date control, or use the calendar tool to select the correct date. *This is a required field*.

Milestone Dates: These are calculated fields and are used both in reports and for your reference as you work with the Participants. You cannot change the values in these fields. Once you enter a date in the Hire Date field, ETO will calculate the dates at which the Participant will pass these important milestones.

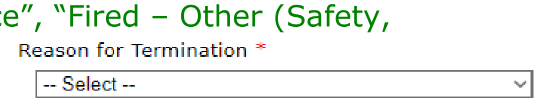
Termination Page



The **Termination Page** will only appear if “Separated” is selected for the Job Status field on the **Employment Page**.



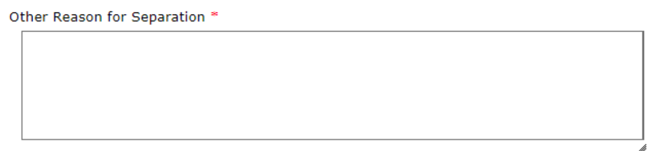
Termination Date: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. Type the date the participant was separated (typically the last date of employment) directly into the date control, or use the calendar tool to select the correct date. *If the date is not known, you will have to estimate the Termination Date and note the reasoning in the Termination Notes. This is a required field*.



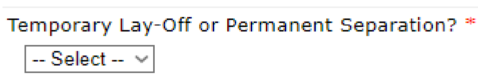
Reason for Termination: This is an exclusive choice (can choose only one) drop-down list box with a preselected list of options: “Fired - Attendance”, “Fired – Job Performance”, “Fired – Other (Safety, Attitude, Drug Test, etc.)”, “Voluntary Quit”, “Transition from Subsidized to Direct Hire”, “Transition from Temp to Direct-Hire at Same Location”, “Temporary Assignment Ended”, Laid Off - Lack of Work”, “Other”, or “COVID-19”. *Select the most appropriate choice from the list. COVID-19 is a temporary option for use during the COVID-19 outbreak and quarantine of 2020/2021. This is a required field.*

Other Reason for Being Fired: This is a free-text field (250 characters). This question appears only if "Fired – Other (Safety, Attitude, Drug Test, etc.)" is selected for the previous field: "Reason for Termination". Type in a short description of any other reason the participant may have been fired. *This is a required field*.

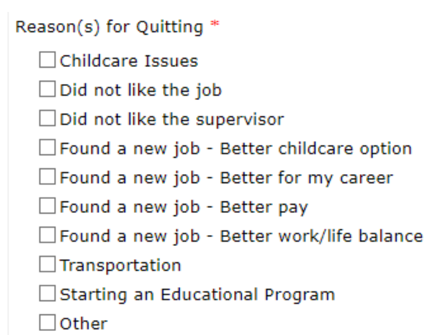
Other Reason for Separation: This is a free-text field (250 characters). This question appears only if "Other" is selected for the previous field: "Reason for Termination". Type in a short description of any other reason the participant may have been separated from this Employer. *This is a required field*.



Temporary Lay-Off or Permanent Separation?: This is an exclusive choice (can choose only one) drop-down list box listing three choices: "Permanent", "Temporary", and "Unknown". The original purpose of this field was associated with COVID-19 job losses, but it also pertains to Lay-Offs for Lack of Work, and only appears if one of those two choices is selected for the previous question: "Reason for Termination". *Select the appropriate response from the list box. This is a required field*.



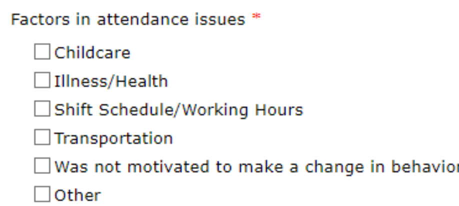
Reason(s) for Quitting: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options: "Childcare issues", "Did not like the job", "Did not like the supervisor", "Found a new job – Better childcare option", "Found a new job – Better for my career", "Found a new job – Better pay", "Found a new job – Better work/life balance", "Transportation", "Starting an Educational Program", or "Other". This question will only appear if "Voluntary Quit" was selected for the previous question: "Reason for Termination". *Select any and all pertinent reasons the participant may have given for quitting this employment. This is a required field*.



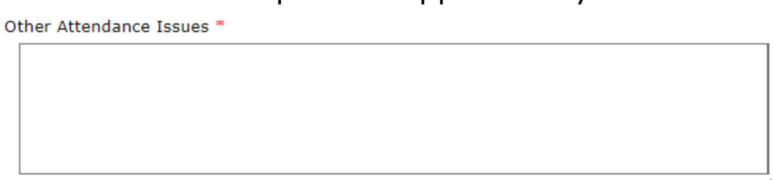
Other Reason for Quitting: This is a free-text field (250 characters).

This question appears only if "Other" is selected for the previous field: "Reason(s) for Quitting". *Type in a short description of any other reason the participant may have voluntarily quit, other than those listed in the option group*. *This is a required field*.

Factors in attendance issues: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options: "Childcare", "Illness/Health", "Shift Schedule/Working Hours", "Transportation", "Was not motivated to make a change in behavior", or "Other". This question appears only if "Fired - Attendance" is selected for the previous field: "Reason for Termination". *Select any and all pertinent reasons the participant may have given for the attendance issues leading to termination*. *This is a required field*.

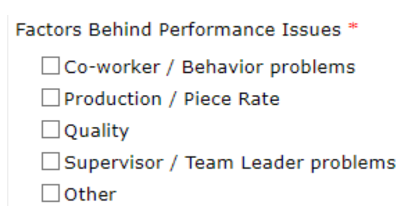


Other Attendance Issues: This is a free-text field (250 characters). This question appears only if "Other" is selected for the previous field:



"Factors in attendance issues". *Type in a short description of any other reason the participant may have experienced attendance issues, other than what is listed in the option group*. *This is a required field*.

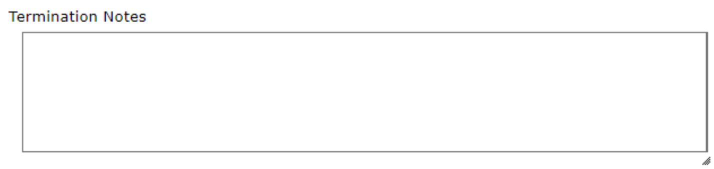
Factors Behind Performance Issues: This is a nonexclusive choice (can choose more than one) option group with a preselected list of options: "Co-worker / Behavior problems", "Production / Piece rate", "Quality", "Supervisor / Team Leader problems", or "Other". This question appears only if "Fired – Job Performance" is selected for the previous field: "Reason for Termination". *Select any and all pertinent reasons the participant may have given for the attendance issues leading to termination*. *This is a required field*.



Other Performance Factors: This is a free-text field (250 characters). This question appears only if "Other" is selected for the previous field:

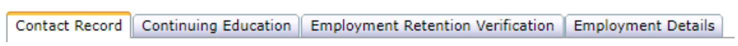
"Factors Behind Performance Issues". *Type in a short description of any other performance issues the participant may have experienced other than those listed in the option group*. *This is a required field*.

Termination Notes: This is a free-text field (8000 characters). *Type a brief explanation of the reason for the participant's termination from the last employer if further explanation if helpful or necessary.* This might include any of a long list of possibilities. Be specific and give a complete answer that others will understand, but not with too much detail. *This is an optional field*.

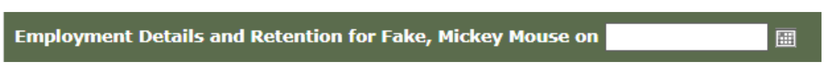


Employment Details and Retention – Child Form

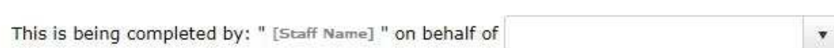
First Page: "Contact Record"



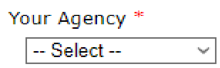
Date Taken: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This date will be blank by default for this TouchPoint. Use the Date of Contact for Date Taken (Date of Contact may be eliminated in the near future). *Enter the correct date directly into the date box, or use the calendar tool to select the date*. TouchPoints will be sorted in ETO based on this date*. This is a required field*.



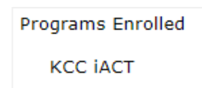
Staff Attribution (Not shown on the form by this name): This is an exclusive choice (can choose only one) dropdown list box containing a list of all ETO Users with access to the program. This field allows you to have another staff member record or edit TouchPoints for you while still giving "credit" to the person with responsibility over the Participant. You cannot select your own name, so this field cannot be required. *If recording for another staff member, or editing someone else's TouchPoint, select their name from the list. This is an optional field*.



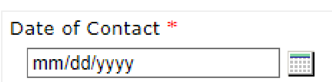
Your Agency: This is an exclusive choice (can choose only one) drop-down list box with a list of the Partner Agencies—currently "Goodwill", "KCC", "Michigan WORKS!", and "Woman's Co-Op". Because *Employment* is a services-based program and all Agencies use it together, ETO has no way of identifying what agency the TouchPoint is being recorded for. This field provides this information. Slightly different from past practice, with this field you should select the Agency that will "own" the TouchPoint, though in virtually all circumstances—unless one Agency assists another with data entry—this will be your home Agency. *Select the "Owning Agency" from the list box. This is a required field*.



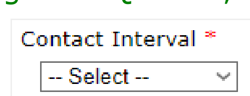
Programs Enrolled: This is a look-up field only, displaying the answer selected for this question on the Parent form—it cannot be changed. This information is meant to alert the User entering the TouchPoint if their program has not been selected on the Parent form. If it has not, you should return to the Parent before proceeding and add the proper program to the TouchPoint. *This field will affect underlying programming in the TouchPoint and must be up-to-date.*

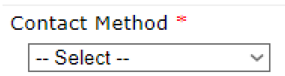


Date of Contact: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This question may seem redundant, and will most often be the same as the Date Taken field, but there will be times it may be different. Enter the date you received the information you are recording, whether by direct contact or by other means of contact. *Note: This field may be disabled in the near future to avoid entering the same date twice, but for as long as it remains... This is a required field.*

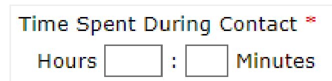


Contact Interval: This is an exclusive choice (can choose only one) drop-down list box with a pre-selected list of intervals for the follow-up, including quarterly intervals from 1st Quarter through 8th Quarter, as well as "Monthly or Other". All agencies will now document all contacts for update in this TouchPoint. KCC participants will use only the Quarterly intervals while others—initially—will use "Monthly or Other". *Select the appropriate choice for this contact from the list. This is a required field*.

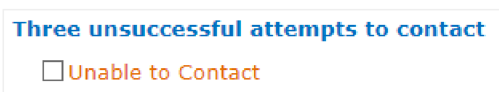




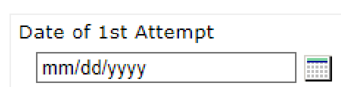
<u>Contact Method</u>: This is an exclusive choice (can choose only one) drop-down list box with a pre-selected list of choices for methods of contact: "Home Phone", "Cell Phone", "Text Message", "email", "Social Media", "Family Member", "Face to Face", "Virtual Meeting", "Unable to Contact", and "Unknown/Not Specified". Select the most appropriate choice for this follow-up. *This is a required field*.



<u>Time Spent During Contact</u>: This is a time field formatted to accept hours and minutes. *Type the number of hours in the box marked "Hours" and/or the number of minutes in the box marked "Minutes"*. This will help to track the amount of time spent on the behalf of each participant. *<u>Do not put only the time spent speaking with the participant, but consider all the time spent on their behalf as a result of this contact, including the time spent completing the TouchPoint</u>.* *This is a required field*.

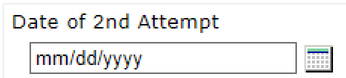


<u>Three unsuccessful attempts to contact</u>: This is a single-option checkbox. If contact with this participant was not possible during the required period, this can and should be documented. As a standard, three attempts will be made to contact participants (document these attempts according to your Agency's policy). Once three attempts have been made and it has been determined the participant cannot be reached, check this box and most of the remaining questions will disappear. Three new questions: "<u>Date of 1st Attempt</u>", "<u>Date of 2nd Attempt</u>", and "<u>Date of 3rd Attempt</u>" will appear. The "<u>Notes</u>" field will also remain active so you can record any other notes or comments pertinent to the unsuccessful contact, including methods used if desired. *This is an optional field*.

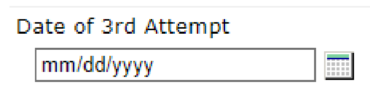


<u>Date of 1st Attempt</u>: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This field only appears when the "<u>Three unsuccessful attempts to contact</u>" box is checked. *Type the date of first attempt to contact directly into the date control, or use the calendar tool to select the correct date*. *This is an optional field*.

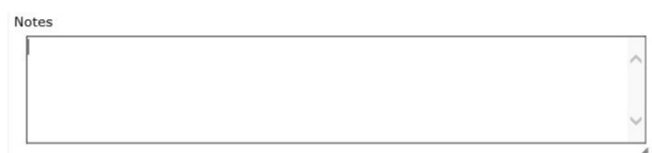
Date of 2nd Attempt: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This field only appears when the "*Three unsuccessful attempts to contact*" box is checked. *Type the date of second attempt to contact directly into the date control, or use the calendar tool to select the correct date. This is an optional field*.



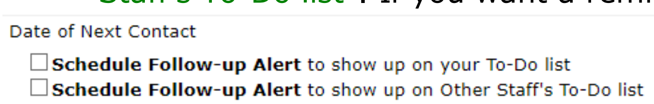
Date of 3rd Attempt: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This field only appears when the "Three unsuccessful attempts to contact" box is checked. *Type the date of third attempt to contact directly into the date control, or use the calendar tool to select the correct date*. *This is an optional field*.



Notes: This is a free-text field (8000 characters). Type any notes about this contact record directly into the text box. Include any and all pertinent information. Be detailed enough that other users will understand what is being said. *This is an optional field.*



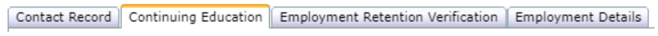
Date of Next Contact: This is an exclusive choice (can choose only one) option group. Choices are "Schedule Follow-up Alert to show on your To-Do list" and "Schedule Follow-up Alert to show on Other Staff's To-Do list". If you want a reminder sent to *your* To-Do list in ETO, click to select the first option. An Alert Date control will appear with a calendar control and blue links that will automatically add 1, 7, 30, 60, or 90 days to whatever date is in the date control, a reminder type option group ("Reminder to complete this TouchPoint" or "Reminder to take a new TouchPoint"), and an alert notes field.



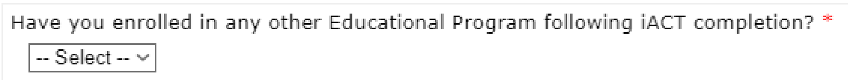
If you want a reminder sent to another person in ETO, click to select the second option and the same controls will appear plus a drop-down list box to select any Program with access to the TouchPoint and a similar drop-down list box to select any staff member with access to the same ETO program.

Select the appropriate choices for each part of the control. *This is an optional field.*

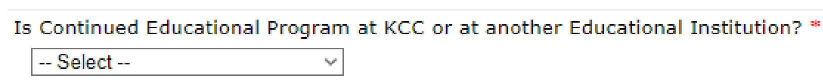
Second Page: "Continuing Education"



Have You Enrolled in any Other Educational Program Following iACT Completion?: This is a Yes/No dropdown list box field. This page and question will only appear if the "Programs Enrolled" field from the Contact Record page contains the answer "KCC iACT". If you are doing a follow-up record for a completed iACT participant and for the iACT program, then it's important to discover and record if they are continuing with another educational program. If not, then select "No" and continue with the TouchPoint. If so, select "Yes" and a new question: "Is Continued Educational Program at KCC or another Educational Institution?", will appear. This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is a required field*.



Is Continued Educational Program at KCC or another Educational Institution?: This is an exclusive choice (can choose only one) drop-down list box with a pre-selected list of choices: "At KCC", "At another Educational Program", and "Unknown or Declined to Answer". This question only appears if "Yes" is selected for the previous question: "Have You Enrolled in any Other Educational Program Following iACT Completion?" and selecting "At Other Educational Institution" will cause two other new questions: "Non-KCC Program Name" and "Non-KCC Institution Name"; to appear below. *Select the appropriate answer for the question*. This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is a required field*.



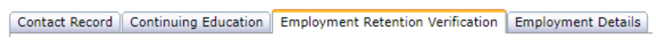
Non-KCC Program Name: This is a free-text field (75 characters). This question only appears when "At another Educational Program" is selected for the previous question: Is Continued Educational Program at KCC or another Educational Institution?. *Type the name of the education program directly into the text box as completely as possible, using common language and terms.* This question will

remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is an optional field.*

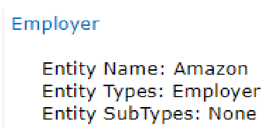
Non-KCC Institution Name: This is a free-text field (75 characters). This question only appears when "At another Educational Program" is selected for the previous question: Is Continued Educational Program at KCC or another Educational Institution?. *Type the name of the educational institution directly into the text box as completely as possible, using common language and terms.* This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is an optional field.*

Third Page:

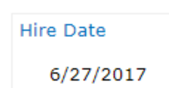
"Employment Retention Verification"



Employer: This is a look-up field only, displaying the answer selected for this question on the Parent form—it cannot be changed. This information is meant to aid the User entering the TouchPoint to know they are entering a Child to the correct Parent and Employer. If it does not match, you should return to the Participant dashboard before proceeding and select the right Parent, if it exists, or record a new Parent to match the Employer you are recording for.



Hire Date: This is a look-up field only, displaying the answer selected for this question on the Parent form—it cannot be changed. This information is meant to aid the User entering the TouchPoint to know they are entering a Child to the correct Parent and Employer. If it does not match, you should return to the Participant dashboard before proceeding and select the right Parent, if it exists, or record a new Parent to match the Employer you are recording for.



Current Employment Status: This is an exclusive choice (can choose only one) drop-down list box with a pre-selected list of choices: "Pre-Program Historical Employment", "Employed at Program Entry", "New employment-Previously Unemployed", "Still with same employer from last contact", "Still with Previous Employer, but Taking 2nd or 3rd Job", "Employed but not with same Employer-New employment", "Separated from last

employer since last contact (newly unemployed)", "Not currently employed, continued from last contact", and "Other". This is, essentially, the only question on this page and is meant to determine employment retention, as well as to record verification of employment. The appropriate answers key on the answer to Pre-Program History and Job Status on the Parent form.

- If the Pre-Program History checkbox was selected, the best answer is "Pre-Program Historical Employment" (both should only be used if they have already separated from this employer at the time of program entry).
- If they had acquired the job before entering your program and still retain the job, select "Employed at Program Entry".
- If they have not been employed for more than 30 days and are just starting with this employer, select "New employment-Previously unemployed".
- If they are still with the same employer from your last contact with the Participant, select "Still with the same employer from last contact".
- Similar to above, if they are still with the same employer from last contact but have taken a second or third job (normally used with the Child TouchPoint that matches the Parent for that second or third employer, select "Still with the Previous Employer, but Taking 2nd or 3rd Job".
- If they have changed jobs within the 30-day window, so they are no longer with the Employer from the previous contact, select "Employed but not with the same Employer-New employment".
- If they were working the last time contact was made with the Participant but have separated from them since then and are currently not working but within the 30-day window, record the Child to the previous employer's Parent TouchPoint and select "Separated from last employer since last contact (newly unemployed)".
- If they were working, as above, the last time contact was made with the Participant but have separated with them since then and are currently not working and are ***outside*** the 30-day window, start a new Parent TouchPoint with the Job Status of "Not

Employed" and on the first Child form select "Separated from last employer since last contact (newly unemployed)"

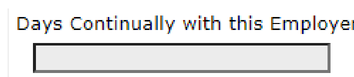
- If "Not Employed" was selected as the Job Status on the Parent form and you are recording contact within a period of unemployment beyond the 30-day window, select "Not currently employed, continued from last contact".

- As a last resort, if none of the choices above applies, you can select "Other". Selecting "Other" will require an explanation in the field that will appear.

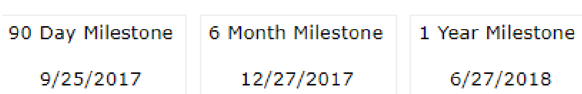
Select the appropriate choice. *This is a required field*.

Explain Other Employment Status: This is a free-text field (250 characters). This field will only appear if "Other" was selected for the previous question: "Current Employment Status". *Type an explanation of the Participants employment status and why "Other" was selected for the field above. Include any and all pertinent information.* Be detailed enough that other users will understand what is being said. *This is a required field*.

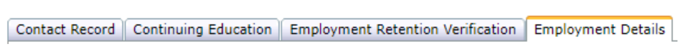
Days Continually with this Employer: This is a calculated field, displaying the number of days elapsed between the Hire Date and the Date of Contact. This field will only appear when the appropriate Employment Status is selected.



Milestone Dates: These are look-up fields only, displaying the answers calculated for them on the Parent form. This for your information only and gives you a visual representation of how the Participant is doing in respect to meeting their goal of sustained continuous employment.

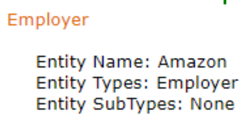


Fourth Page: "Employment Details"

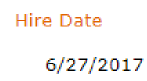


Job Status: This is a look-up field only, displaying the answer selected for this question on the Parent form—it cannot be changed. This information, though meant to aid the User entering the TouchPoint to know they are entering a Child to the correct Parent and Employer, primarily provides some continuity to the Employment Details recorded on the page.

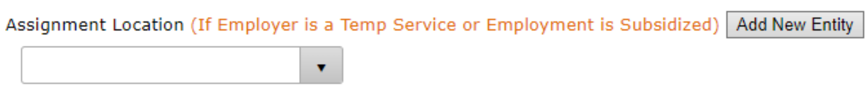
<u>Employer</u>: This is a look-up field only, displaying the answer selected for this question on the Parent form—it cannot be changed. This information, though meant to aid the User entering the TouchPoint to know they are entering a Child to the correct Parent and Employer, primarily provides some continuity to the Employment Details recorded on the page.

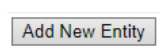


<u>Hire Date</u>: This is a look-up field only, displaying the answer selected for this question on the Parent form—it cannot be changed. This information, though meant to aid the User entering the TouchPoint to know they are entering a Child to the correct Parent and Employer, primarily provides some continuity to the Employment Details recorded on the page.



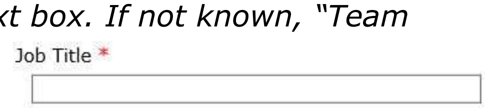
<u>Assignment Location</u>: This is an exclusive choice (can choose only one) drop-down list box with choices, taken directly from the Entities table, having the Type of "Employer" assigned. ETO will only list employers assigned to your program in the database or designated as an "Enterprise Level" Entity. This field is for Participants working for Temporary Staffing services such as Manpower, Kelly Services, or Express Employment. When creating Employer Entities, ***do not create a different temp service Entity for each possible workplace*** a Participant might work for them. Instead, there should be only one Entity for each temp service and that should be listed as the Employer on the Parent form and displaying in the <u>Employer</u> field at the top of this page. When temp services are listed as Employer, you can record the name of the business or location where they are working in this field.



You can use the "Add New Entity" button  *in the field name to add a new Employer if necessary.*

Select the correct employer name as a temporary worksite from the list. This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is an optional field*.

<u>Job Title</u>: This is a free-text field (50 characters). *Type the participant's job title directly into the text box. If not known, "Team Member" or "Associate" are acceptable catch-all responses.* This question will

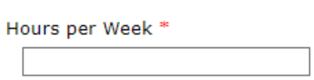


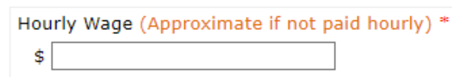
remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is a required field*.

Industry (NAICS): This is an exclusive choice (can choose only one) drop-down list box with a pre-selected, wide but not exhaustive, list of choices from the NAICS Industry Classification list. For Participants receiving job training it is important to know if they end up working in the field of service for which they've been trained by one of our Partner Agencies. The Industry Classification you select should match the job the Participant is working rather than the primary role of the Employer. For example, someone working in the food service portion of a factory should be listed as "Accommodation and Food Services (72)" rather than "Manufacturing (31-33)", or someone working as a truck driver for the VA Medical Center should be listed as "Transportation and Warehousing (48-49)" rather than "Health Care and Social Assistance (62)". For Participants working at food processing plants, such as Clemens or Prairie Farms, use "Manufacturing (31-33)". *Select the most appropriate industry and code from the list.* This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is a required field*.

Part-Time/Full-Time Status: This is an exclusive choice (can choose only one) drop-down list box with a pre-selected list of options: "Part-Time", "Full-Time", and "Unknown". Make every effort to find out the answer to this and the next question, "Hours per Week", as it is an important part of our quantitative outcomes to know if Participants are increasing the number of hours worked and improving from part-time to full-time. *Select the most appropriate choice from the list.* This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is a required field*.

Hours per Week: This is a number field formatted as a general number and will accept only numeric characters, with a minimum of 0 hours, a maximum of 80 (ETO will only accept answers between 0 and 80). Type in an anticipated, *estimated*, average number of hours the participant is expected to work. This question will ***not*** remember and pre-populate with the last value recorded as it is used to calculate fields later on the page. Entering a value will force the calculation. *This is a required field*.

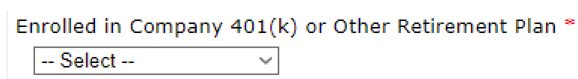




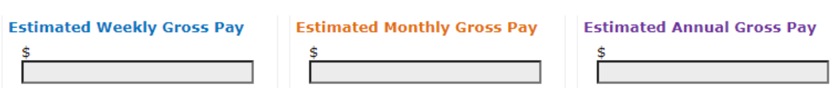
Hourly Wage: This is a number field formatted for US currency—this field should only be used to record ***hourly*** rates of pay. *Type the amount of the participant's current wage.* If there has been no change from the Starting Wage, enter the same amount. ***For non-hourly compensation, calculate/estimate the hourly amount and enter it here.*** This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is a required field*.

Enrolled in Employer Medical?: This is an exclusive choice (can choose only one) drop-down list box with a pre-selected list of options: "Yes", "No", "Covered under another plan", and "Unknown or Unreported". *Select the most appropriate choice from the list.* This question will remember and pre-populate with the last value recorded in previous TouchPoints for this participant. *This is a required field*.

Enrolled in the Company 401(k) or Other Retirement Program?: This is an exclusive choice (can choose only one) drop-down list box with a pre-selected list of options: "Yes", "No", and "Unknown or Unreported". *Select the most appropriate choice from the list*. This question will ***not*** remember and pre-populate with the last value recorded in previous TouchPoints for this participant, but will encourage you to skim through the previous questions to make sure they are all current and correct for this contact interval period. *This is a required field*.



Estimated Gross Pay: These fields are calculated fields formatted for US Currency, calculating estimated Weekly, Monthly, and Annual Gross Pay based on the Hourly Wage and Hours per Week—they cannot be changed. These fields are for information only and give you an idea how the Participant is progressing toward their goal of earning a sufficient wage to support them and their families.



1. Click on the "Save" button to complete the record.

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