

## Incumbent Worker Training Data Entry:

To set up an incumbent worker in ETO without asking Incumbent to set up a SAW Account and WorkSourceWA profile:

1. First, **check** to make sure the individual is **not already in ETO**.
  - If they are, you can request from the 'pocket universe' staff to opt them out so they don't receive blast emails.
  - If they are not in ETO, proceed to #2
2. From the side tool bar, select **Participants, Add New Participant**
3. Check box **"Enroll in Program"** and **enter the start date** of the IWT
4. Enter **First Name, Last Name, Date of Birth, Social Security number** & email if available
5. **Save**. This will take you to the Duplicate Information page.
6. On the Duplicate Information Page, **verify** the person is **not a duplicate** click, then **"Add as New"**. This will take you to the participant's dashboard.
7. On the participant's dashboard under **General Info**, click **+ New** and proceed with instructions below.

## From State Policy: [5607 Revision 3](#)

1. Select the **WIOA Eligibility Application TouchPoint** and then select the **full WIOA enrollment and Dislocated Worker** option.
  - a. **(Local Add) Selective Service Tab** Select "Not Applicable". In the Exemption Explanation/Reason box, enter, "Not required for IWT."
  - b. Select the "None of the above" radio button under **Dislocated Worker Status**. Record the training start date in the **Date of Actual Dislocation** field and the employer name in the **Employer of Dislocation Address** field on the **Employment** tab.
2. Select the **Program Enrollment TouchPoint** and enroll the participant in the program that reflects the funding source. For example, if the funding source is WIOA Adult, select that program rather than WIOA Dislocated Worker.
  - a. **(Local Add)** For Highest level of Education at Time of Enrollment, select "No school grades completed," from drop-down menu. In Enrollment Comments box enter: "Education level not required for IWT."
3. Select the **Individualized, Training and Supportive Service (ITSS)** TouchPoint and select the **Incumbent Worker Training service** from **Service Provided** drop down menu. Select the **Active Program Enrollment** to associate the service with the active program and save the TouchPoint. Enter activity start and planned end dates. Enter a case note to describe the training, reason for training, start date, planned end date, planned outcome (ie: credential, wage increase, etc). If training duration is longer than a month, progress case notes are to be entered monthly until training completion.
  - a. **(Local Add)** Upon completion of training, enter date and outcome.
4. To program exit incumbent workers, enter **Outcomes, Program Completion** TouchPoint. Reason for completion should be **Unsubsidized Employment** if worker was retained by employer. Enter completion date and comments. On Employment tab, mark Employed as **Yes**. Enter at a minimum, Employment Start Date, Unsubsidized Employment ("Yes), Wage Amount, Wage Frequency (select "per hour"), and Annualized Wage.

**Important Note:** If multiple funding sources are used for the training, a separate Program Enrollment TouchPoint and ITSS Incumbent Worker Training service are needed for each program funding the training. A new WIOA Eligibility Application is needed if a full application was not originally taken.