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.