



# EMPLOY MILWAUKEE DESK AID

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# ETO Dashboard and Touchpoint Tutorial

Questions regarding ETO?

Please contact the ETO helpdesk at

[eto.helpdesk@employmilwaukee.org](mailto:eto.helpdesk@employmilwaukee.org).

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**Special Note: Items in ETO denoted with a red asterisk \* is a required data point.**



# 1. Navigating the User Dashboard

The **user dashboard** will be the first thing you see when logging into a specific program. The user dashboard will include participants you have worked with in the system, recent data you have entered and recent participants you have worked with.

The screenshot shows the ETO user dashboard. At the top, there is a search bar labeled "Search Term(s)..." and a "SEARCH" button. Below the search bar, there are several data panels: "Recent Participants/Entities", "Recent Participants", "Recent Entities", "Voucher Approval", "Recent Voucher Approvals", and "Outstanding Vouchers (60+ days)". A sidebar menu on the left contains items like "My Dashboard", "To-Do List", "New", "My Favorites", "Help", "Participants", "Participant History", "My Work", "Entities", "TouchPoints", "Reports", and "Program Administration".

Type participant's last name in the Quick Search field and click on "Search" (Only Active Participants will show) or click on participant's name if it appears in the Recent Participants section (there are no recent participants in this example).



## 2. Navigating the Participant Dashboard

The **participant dashboard** will provide information that has been recorded in ETO that is specific to the participant. The participant dashboard will include participant information, the programs that the participant has been enrolled in (only site specific) and details of services that have been provided for the participant.

**Participant Information**

CaseNumber: 211548  
Address1: [REDACTED]  
Address2: [REDACTED]  
ZipCode: 53223  
City, State: Milwaukee, WI  
Email: [REDACTED]  
CellPhone: (414) [REDACTED]  
SSN: [REDACTED]  
Gender: Male  
DOB: [REDACTED]  
Age: 40 years  
ASSET PIN Number: [REDACTED]  
[View Participant](#)

**Programs**

Program Name	Start Date	End Date	Reason for Dismissal
[REDACTED] - 2 - Enrolled	9/23/2024	9/23/2024	WIOA Exit
[REDACTED] - 1 - Intake	9/9/2024	9/23/2024	WIOA Enrollment

[Review All \(?\)](#)

**Training/Education Records**

There are no recent TouchPoints for this participant.

Click on the + sign to expand for details  
Click on the - sign to minimize.

**Credentials Earned**

There are no recent TouchPoints for this participant.

+ New



### 3. Adding an Enrollment to an Existing Participant

Enterprise Enroll allows users to enroll an existing participant from any site in ETO to avoid duplicating participant records.

- From the User Dashboard Search use the left menu bar, select Enterprise Enroll.



- Type the participant data point

- Click 

Enroll a Participant in Community Resource Navigator - EMI - 1. Intake

Search Settings Search Help

Search for a participant or family to enroll based on your search settings  
Participant search will return results based on: Full name, ASSET PIN Number, CaseNumber, SSN

Only one field will be used to search at any given time.

Participant Search

Search

- Scroll through the results. Click on the correct participant's name.

Below are all participants who are not currently enrolled in Community Resour

<input type="checkbox"/>	NAME	CASE NUMBER
<input type="checkbox"/>	Daywanda Fake Bush Fake	195614
<input type="checkbox"/>	CseNumber Fake	140707
<input type="checkbox"/>	CseNumberrrrrr Fake	140722
<input type="checkbox"/>	CseNumberY Fake	140719
<input type="checkbox"/>	CseNumberZ Fake	140715
<input type="checkbox"/>	DupeCheck Fake	140727
<input type="checkbox"/>	Duplicete Fake	140724
<input checked="" type="checkbox"/>	Tyler Fake	161020

- Select the participant name, review the demographic information (Ex. DOB, SSN) displayed to confirm you have the correct participant identified.

- If this is not the correct participant, go back to the list and continue to review each person until you find the participant you are looking for. Once you confirm you have found the correct record, enter the Program Start Date and select 

\* Program Start Date:

Enroll Participant

- Go to View/Edit participant to update the demographics.

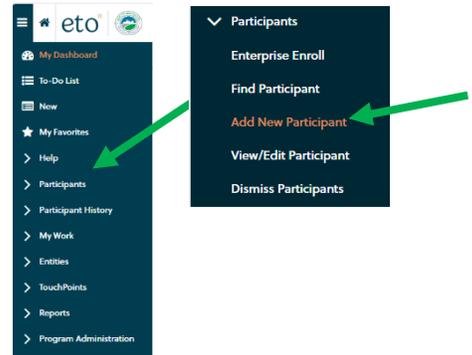
**Please Note:** ETO stores the most recent demographics when enterprise enrolling. It is very important to update the demographics using View/Edit Participant when using this feature.



## 4. Adding a Participant That was Not Found in ETO

Once you have confirmed that the participant is **not** already entered into the database via **ENTERPRISE ENROLL** – NOT a quick search, you may add a new participant. Using left hand side navigation bar

- Expand “Participants”.
- Then click on “Add New Participant” and a new window will appear.
- Scroll through the window, enter all the pertinent information.
  - Never uncheck “Enroll in Program”



**Program Enrollment**

Enroll in Program   
Program Start Date \*

**Add New Participant**

Case Number

Career Planner - WIOA Adult EWS \*  
--Select--

ASSET PIN Number

Last Name \*

First Name \*

Middle Name

Suffix  
--Select--

Address 1

Address 2

Zip Code

Cell Phone (\_\_\_\_) \_\_\_\_\_  
Home Phone (\_\_\_\_) \_\_\_\_\_  
WorkPhone (\_\_\_\_) \_\_\_\_\_  
Email

Email opt-out? --Select--

Gender --Select--

DOB \*

SSN

SSN opt-out? --Select--

Ethnicity: Hispanic or Latino \*  
--Select--

Race  
 American Indian or Alaskan Native  
 Asian  
 Black or African American  
 Hawaiian Native or Other Pacific Islander  
 White  
 Prefer not to disclose

Manufacturing  
 Professional, Scientific, Technical Services (IT)  
 Transportation and Warehousing

which of these industries have you been employed?  
 Construction  
 Finance and Insurance  
 Healthcare and Social Assistance  
 Hospitality (Retail and Food Service)  
 Manufacturing  
 Professional, Scientific, Technical Services (IT)  
 Transportation and Warehousing  
 I have never been employed

what is your current employment status?  
--Select--

Unemployed for 27 or more consecutive weeks?  
 Yes/True  
 No/False  
Clear Selection

How did you hear about us?  
 Newspaper, Television or Radio  
 Social Media  
 Internet Search  
 Mobile Workforce Connections  
 Word of Mouth

Word of Mouth  
 Referral Agency

Specify Referral Agency

Do you have a disability?   
--Select--

Category of Disability?  
 Physical/Chronic Health Condition  
 Physical/Mobility Impairment  
 Mental or Psychiatric Disability  
 Vision-related Disability  
 Hearing-related Disability  
 Learning Disability  
 Cognitive/Intellectual Disability  
 Prefer not to disclose

Receive disab. services funded by the following?  
 WI Department of Health Services (DHS)  
 Funded via a State Medicaid Home and Community-Based Waiver  
 A Local or State Mental Health Agency  
 Prefer not to disclose

Currently employed in a work setting listed below?  
--Select--

Customized employment services received?  
--Select--

Financial/capability services received?  
--Select--

Current/Previous IEP in secondary school? --Select--

Do you have a Section 504 Plan? --Select--

The Work Number, EV - FOR OFFICE USE ONLY  
GEO Latitude   
GEO Longitude   
GEO Match Type --Select--  
GEO Num/Match --Select--  
GEO Match Score



## 5. Quick Search for a Participant to View/Edit

**Quick Search** is available at the top of your ETO screen and functions as a quick way for users to search for participants within the current program and site.

Using the menu bar at the top of the screen,

- Type the participant's last name only using one data point (e.g.: last name <OR> case number, etc.) at a time.



- Select Program or Site



- Click Search



- Review the list of participants, click on the matching participant name.



- Select the most appropriate choice.

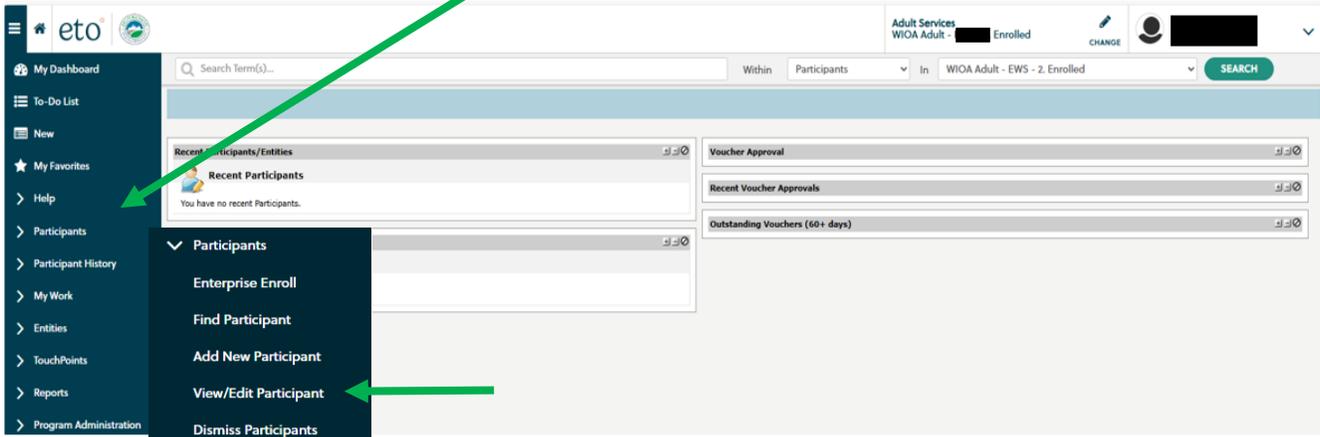




## 6. Alternate Search for a Participant Record to View/Edit

There are several ways to view or update demographic information for a participant. You can complete a Quick Search to find the participant and select View/Edit or from the User Dashboard

- On left hand side menu bar, click Participants to expand.
- Click on View/Edit Participant.



- In the field indicated, enter the data point you want to search by.
- Click
- Scroll through the list to find your participant.
- Click on their the correct name to view the participant.

View/Edit Participant

baker

To see all Participants leave the box empty.

Include dismissed participants in results

Search results for williams

NAME
Williams, [REDACTED]
Williams [REDACTED]
Williams, [REDACTED]

# Participant view

**View Participant**

[Audit Report](#) [Program History](#) [Enroll](#) [View Al SMITH's Dashboard](#)

Status: Currently Enrolled in This Program

Case Number  
[REDACTED]

Career Planner - WIOA Adult EWS  
[REDACTED]

ASSET PIN Number  
[REDACTED]

Last Name  
SMITH

First Name  
[REDACTED]

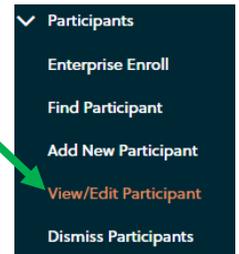
Middle Name  
[REDACTED]



## 7. Moving a Participant from One Program to Another

**To move Participant from one program to another** (Example: Intake to Enrolled Program)

- From the Participant's Dashboard, click on View/Edit Participant found in the left hand side menu bar.
  - A new window will appear
  - From View/Edit Participant screen, click on Enroll at the top. 
  - Check the box  next to the Program Name where you want to add participant.
  - Program Start Date will default to today's date. To change this date, click on the date field to edit.
  - Click on Save and you will be returned to View/Edit Participant.
  - Click on Dashboard link at top of page. 



- The Participant dashboard will now show both programs they are enrolled in.

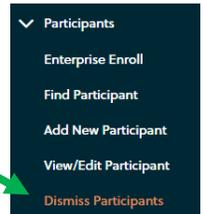
Programs	
	Programs
Program Name	
<a href="#">WIOA Adult - [redacted] 2. Enrolled</a>	
<a href="#">WIOA Adult - [redacted] 1. Intake</a>	



## 8. To Dismiss a Participant from a Program

When intake is complete or when a participant is done with a program they were enrolled in, you will need to dismiss the participant from the intake or other program.

- Using left hand side navigation bar, click on Dismiss Participants.



- A new window will appear.
- Enter identifying participant information
- Click "Search"

Dismiss Participants from WIOA Adult: [redacted] 2. Enrolled

Search for Participants in Adult Services by last name and/or first name, Social Security Number, case number, or family name. To see all Participants leave the boxes empty.  
1. Enter search criteria. 2. Select participant(s) to dismiss. 3. Enter dismissal information. If multiple participants are selected with different dates, finish on the following page.

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

- A list of participants' names will appear.

Below are all Participants who are currently enrolled in WIOA Adult: [redacted] Enrolled with last name like 'smithy'.

<input type="checkbox"/>	PARTICIPANT	AGE	CASE NUMBER	DOB	SSN
<input type="checkbox"/>	[redacted] Smith	25	[redacted]	[redacted]	[redacted]
<input type="checkbox"/>	[redacted] Smith	19	[redacted]	[redacted]	[redacted]

- Check the box  next to participant name that you want to dismiss from the program.
- Scroll below the list of names and enter the program end date.

- Use the drop down to select the appropriate dismissal reason.

Program End Date:

Dismissal Reason:

- Click Dismiss Participant



# 9. Recording Training/Education Records

Training/Education Records are recorded to track the program a participant is being referred to, enrolled in, completed, or did not start/complete.

**Please note:** A 'Training/Education Record' is recorded once for all phases of a specific training/education service. The only time you would record multiple training/education records is if a participant was in multiple services.

- From the Participant Dashboard, Select "+ New" button in the Training/Education Records Dashboard touchpoint.



- Complete fields within the Training Record shown below.



- Use the drop down to select appropriate funding source or begin typing the funding source in the field which will narrow search based on what was typed.
- Record training/education details based on when the activity occurs. Every time a new phase of the training occurs, edit the same 'Training/Education Record' touchpoint.
- When recording the 'Training Provider/Vendor' field, start typing vendor name in box instead of using drop down arrow.
- Select appropriate 'ONET Group'. 'ONET Group' is based off the first two digits of the 'ONET Code'. Once 'ONET Group' is selected, another field populates where you select the ONET title. ONET title should be the same as the 'ONET Code'.

Training/Education Record for [redacted] on 3/26/2025

Identifier: WIOA Adult: [redacted]

**Training Record**

Funding Source: \* [dropdown]

Referred Date: \* mm/dd/yyyy [calendar icon]

Training Start Phase:  
 Enrolled  
 Did not start

Training Category: \* [dropdown] Training/Education: [dropdown]

Training Provider/Vendor: \* [dropdown] Training Title: \*

Search for ONET codes here: [ONET TEST](#)

ONET Group: \* [dropdown]

Training Record Notes: [text area]

Remind Me:  
 Schedule Follow-up Alert to show up on your To-Do list  
 Schedule Follow-up Alert to show up on Other Staff's To-Do list

- "Save" once complete.



# 10. Recording Credentials Earned

Credentials Earned are recorded to track a credential that a participant obtains through a training or educational activity.

- From the Participant Dashboard, Select "+ New" button in the touchpoint.
- Complete fields within Credentials Earned shown below.



- Use the drop down to select appropriate funding source or begin typing the funding source in the field which will narrow search based on what was typed.
- Record credential earned details based on the credential being documented. **Remember:** Record credentials only after the required documentation has been obtained.
- Use the drop down to select the training record the credential is related to. Note the unique format of information.
- "Save" once complete.

Credentials Earned for [redacted] on 3/26/2025

Identifier: WIOA Adult [redacted]

Credentials Earned

Funding Source \*

Credential Earned Date: \* mm/dd/yyyy

**NOTE:** Please select the related training record below for this credential. The drop down list contains all training records in the following format:  
[Funding Source] [Training Provider/Vendor] [Enrolled Date] [Training Title]

Select the Training Record this credential is related to: \*

Credential Name: \*

Credential Type: \* -- Select --

Credentials Earned Notes:

Remind Me:

- Schedule Follow-up Alert to show up on your To-Do list
- Schedule Follow-up Alert to show up on Other Staff's To-Do list

Cancel Save and Record Similar Save



# 11. Recording Supportive Services Details

Supportive Service Details are recorded to track any supportive services a participant obtains. This includes Childcare Assistance, Clothing or Work Apparel, Counseling, Housing Assistance, Legal, License Fees, Other Supports, Transportation Assistance, or Work Tools & Equipment.

- From the Participant Dashboard, Select "+ New" button in the touchpoint.
- Complete fields within Supportive Services Details shown below.
- Use the drop down to select appropriate funding source or begin typing the funding source in field which will narrow search based on what was typed.
- Enter the date that the supportive service was provided.
- Record remaining supportive service details.
- Supportive Service Notes are required and should contain details of the supportive service provided.
- "Save" once complete. 



Supportive Service Details for [redacted] on 3/26/2025 

Identifier: WIOA Adult [redacted]

---

**Supportive Services**

Funding Source: \*

Supportive Service Date: \*  

Provider Name \*

Supportive Service: \*

Supportive Service Notes: \* 



## 12. Recording Vouchers

Vouchers are recorded to track funds that a participant is provided for training/education, supportive services or incentives. Voucher dates can be tricky. At the end of this section, see a special note on voucher date definitions.

**Please Note:** A voucher cannot be created until a training/education, supportive service or incentive record has been created.

- From the Participant Dashboard, Select "+ New" button in the touchpoint.



- Complete fields within Submit Voucher shown below.

- The Voucher Detail, Disbursements, and Itemized Amounts tabs must be filled out completely in order to save record.

Submit Voucher for [redacted] on 3/26/2025

Identifier: WIOA Adult: [redacted]

Voucher Detail | Disbursements | Itemized Amounts | Voucher Status

Payment Method \*  
-- Select --

Voucher Effective From Date: Anticipated Date the specific class or service covered by this voucher will start

Voucher Effective Through Date: Anticipated Date the specific class or service covered by this voucher will end.

The From and Through Date may not exceed 6 months. The 'Through Date' may not extend beyond the Entire Training End Date.

Voucher Effective From \* mm/dd/yyyy

Voucher Effective Through \* mm/dd/yyyy

Pay To \*  
-- Select --

- Use the drop down to select appropriate payment method or begin typing the method in the field which will narrow search based on what was typed.

- Voucher Effective dates may not exceed six months.

- Use the drop down to select appropriate payment recipient.

- At the bottom of the screen, click [Next Page](#) to proceed to the Disbursements tab.

- Record the disbursements; at the bottom of the screen, click [Next Page](#) to proceed to the Itemized Amounts tab.

Voucher Detail | **Disbursements** | Itemized Amounts | Voucher Status

Voucher Funding Source: \*  
[redacted]

Fund Type: \*  
-- Select --

- Record the itemized amounts. These will populate differently based on the fund type that is selected above. If there are not any costs for a specific category, enter 0.

Voucher Detail   Disbursements   **Itemized Amounts**   Voucher Status

Amount:

\$ 0

**Response must be greater than or equal to 1**

Notes \*

- The notes field must identify the specific items and amounts for each. Please note: Only the first three rows of the notes field will appear on the printed voucher.

- At the bottom of the screen click 

- The Voucher Status tab is for Program Specialists/Managers to update voucher status.

Voucher Detail   Disbursements   Itemized Amounts   **Voucher Status**

**ONLY EMPLOY MILWAUKEE Contract Monitors/Managers can edit the status.** This page allows you to change the status of the voucher. If you are a case manager submitting a voucher please disregard this page and proceed with submitting the voucher on the previous tab.

Voucher Status:

Awaiting Approval

Preliminary Approval Date: mm/dd/yyyy

Approved Date: mm/dd/yyyy

Voided Date: mm/dd/yyyy

## Voucher Date Definitions

Below is an explanation of the two sets of dates that appear on a voucher.

- The Voucher Effective From and Through Dates are located on the Voucher Detail tab of the ‘Submit Voucher’ Touchpoint.
  - Voucher Effective From is the anticipated date the specific class or service covered by this voucher will start or be provided.
  - Voucher Effective Through is the anticipated date the specific class or service covered by this voucher will stop being provided. The time duration of the ‘Effective From Date’ to the ‘Effective Through Date’ should not exceed six (6) months. The ‘Effective Through Date’ may not extend beyond the Entire Training End Date.

Voucher Effective From Date: Anticipated Date the specific class or service covered by this voucher will start

Voucher Effective Through Date: Anticipated Date the specific class or service covered by this voucher will end.

The From and Through Date may not exceed 6 months. The ‘Through Date’ may not extend beyond the Entire Training End Date.

Voucher Effective From \*  

Voucher Effective Through \*  

2. Anticipated Training Start and End Dates are located on the Disbursements tab of the 'Submit Voucher' Touchpoint.

- Anticipated Start Date represents the start date of the entire training or education program. The entire program may include several semesters, or several terms of course work.
- Anticipated End Date represents the end date of the entire training or education program.
- The entire program may include several semesters or several terms of course work.

Anticipated Training Start Date: Anticipated start date of the ENTIRE training or education program.

Anticipated Training End Date: Anticipated end date of the ENTIRE training or education program.

Anticipated Training Start Date: \*  

Anticipated Training End Date: \*  



# 13. Recording Employment Records

Employment Records are recorded to track subsidized and/or unsubsidized employment.

- From the Participant Dashboard, Select "+ New" button in the touchpoint.
- Complete fields within Employment Record shown below.
- Record remaining employment record details.



Employment Record for [redacted] on 3/26/2025

Identifier: WIOA Adult: [redacted]

### Employment Record

Funding Source: \*

Credit to:

Job Order  
 Job Order and Event  
 Other Employment

Employment Type: \* -- Select --      Employment Category: -- Select --

Employment Start Date: \* mm/dd/yyyy

Employer:      Employment Title:

Search for ONET codes here: [ONET](#)  
ONET numeric format must be ##-###-## (example: 00-0000.00)  
Copy/Paste the ONET code below or manually type in the field.

ONET Group \* -- Select --

Terminated? \*

Yes  
 No

Current Hourly Wage: \$

Hours Per Week

Is this training-related employment?      Employment verified by Employ Milwaukee via The Work Number?

Yes       Yes  
 No       No

Employment Record Notes:

Remind Me:

Schedule Follow-up Alert to show up on your To-Do list  
 Schedule Follow-up Alert to show up on Other Staff's To-Do list

- Select appropriate 'ONET Group'. 'ONET Group' is based off the first two digits of the 'ONET Code'. Once 'ONET Group' is selected, another field populates where you select the ONET title. ONET title should be the same as the 'ONET Code'
- "Save" once complete.



## 14. Recording Incentives

Incentives are recorded to track any incentives a participant earns.

- From the Participant Dashboard, Select "+ New" button in the Incentives touchpoint.
- Complete fields within Incentive screen shown below.



- Use the drop down to select appropriate funding source or begin typing the funding source in the field which will narrow search based on what was typed.
- Enter the date the incentive was earned.
- Use the drop down to select the appropriate incentive category.
- If incentive amount doesn't populate based on the selected incentive category above, add incentive amount.
- Click on "Save" once complete.
- Remember to proceed to Submit Voucher and enter a voucher for the incentive.

The screenshot shows the 'Incentive' form with the following fields:

- Funding Source \***: A dropdown menu.
- Incentive Date \***: A date input field with a calendar icon and the placeholder 'mm/dd/yyyy'.
- Incentive Category \***: A dropdown menu with the placeholder '-- Select --'.
- Incentive Amount \***: A text input field with a dollar sign (\$) and a placeholder.
- Notes**: A large text area for additional information.

A 'Save' button is located at the bottom of the form.

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