DRAFT

ETO User's Manual

A guide for MIECHV home visiting programs

IDAHO
Maternal, Infant & Early Childhood
Home Visiting Program

9/12/2012

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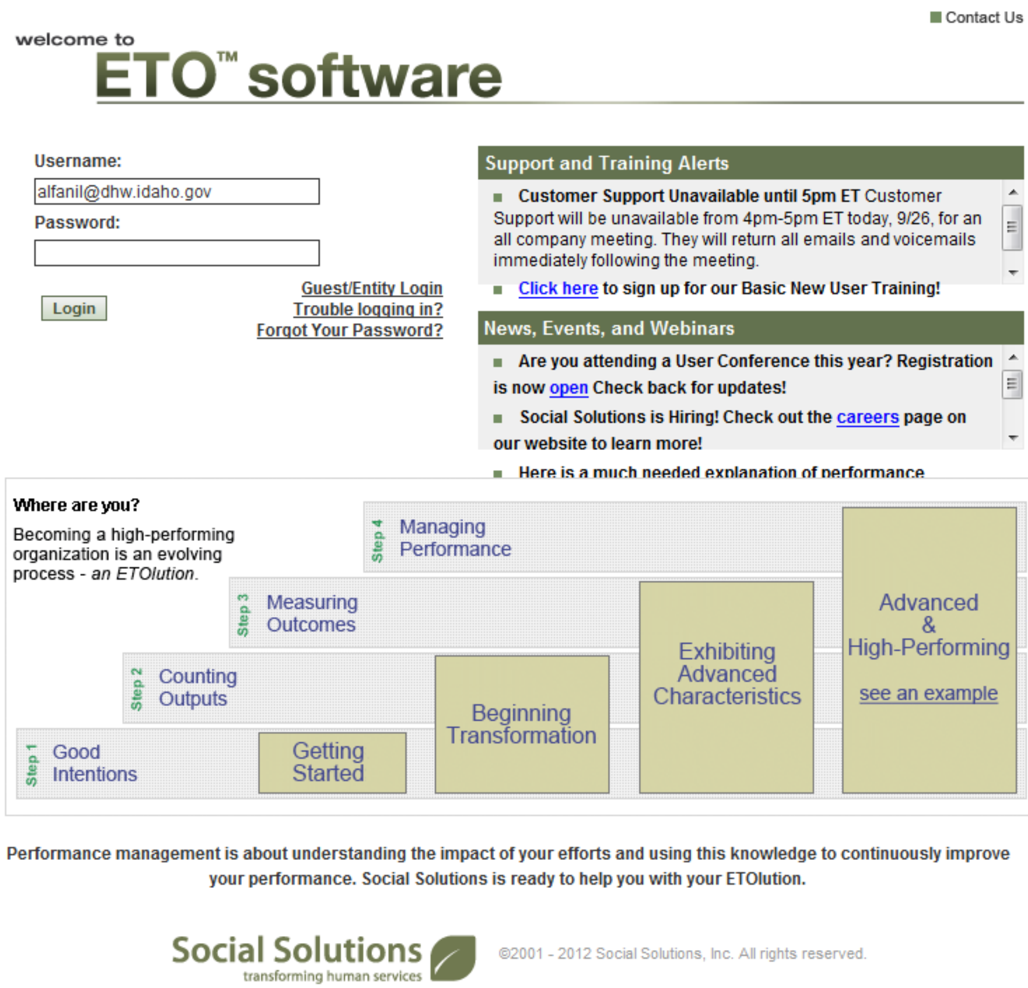
Accessing ETO, Creating Shortcuts and Favorites to ETO

There are two different web addresses that will allow you to reach the ETO software login page:

1. www.etosoftware.com
2. www.idahomiechv.etosoftware.com

ETO Login Screen



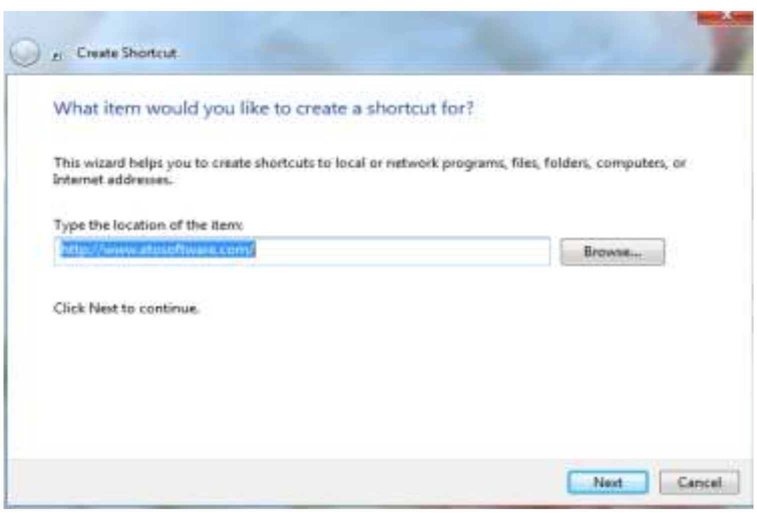
So you can easily find the ETO site, it's recommended that you do the following on your computer. Once you have the ETO log in screen, do the following:

1. Add the web address to My Favorites in your Internet Explorer Browser

Adding to Favorites Bar

2. Create a shortcut for the desktop
    a. Right click on your desktop, where no other windows or files appear
    b. Select "New" and then click "Shortcut"
    c. Type www.etosoftware.com into the "Type the location of the item"
    d. Click "Next" and name the shortcut *ETO software* or something similar
    e. You will find the "Internet Explorer shortcut on your desktop

Creating a desktop shortcut



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Log In / Log Off

To logon to the ETO system, you must use Windows Operating System (not Apple). Internet Explorer version 8 (in compatibility mode) is the best way to access ETO. Other browsers (Firefox, Chrome, etc.) should not be used. These browsers will work, but may be slower or not allow users to access full system functionality.

The logoff link is found in the top right hand corner of the screen. Always log off to securely end your session. Because there is personally identifying information stored in the ETO software, it is important to log off to protect client information. There is a "Log off Report" that can be accessed in Standard Reports to assess if users are properly logging off of ETO. You will find the Log Off option in the upper right hand corner of your Internet Explorer browser window, below the toolbars.

User Rolls

There is a hierarchy of user roles that determines which features and reports users have access to once logged on to ETO. If you are unable to complete a task in ETO that you need access to, send an inquiry and request permission from the Enterprise Administrator [Laura Alfani at alfanil@dhw.idaho.gov] by sending an e-mail with a subject line of "ETO Permissions Request". In the e-mail body describe the new permissions requested and business reason for the additional permissions. User rolls include:

- Enterprise Administrator: Maintains multiple sites, may add/edit fields and settings
- Site Manager: Maintains one site, may add/edit fields and settings
- Department Head: may build queries with the Query Wizard
- Program Manager: uses ETO to oversee staff's work
- Staff: enters their work and runs reports to review and analyze their work

Change Program

Hundreds of organizations all over the county use ETO to manage their program data. The slice of the ETO system that was designed for the Idaho MIECHV program, is called an "enterprise" within the larger ETO software systems. Within Idaho's slice or "enterprise" there are two "sites," associated with the two geographical regions the targeted by the MIECHV program. Within each "site" there are multiple programs corresponding to the different home visiting models and other functions including: Central Intake, Early Head Start (EHS), Parents as Teachers (PAT), Nurse-Family Partnership (NFP), Program Quality, and Administration and Reporting.

Most staff will have access to at least two programs. For example a home visitor at EHS might have access to the EHS site and program quality. Most program managers will have access to at least three programs. A manager at PAT might have access to the PAT site, Central Intake, and Program Quality. Users will only be able to see participants within the programs they have access permissions. For example, a manager for NFP will not be able to see participant information for families enrolled in EHS, except for the limited information available in the central intake program.

Each program has different functions. For example, in the central intake program - program managers will review referrals and determine which home visiting program (EHS, PAT, or NFP) the participant will be referred. The EHS, PAT, and NFP program sites will house participant information including demographics, service utilization, progress towards goals, referrals, group socializations, and much more. Users will need to navigate between different programs to enter specific data and access different components of the ETO software. To change which program you are in, click the (Change Program) link. A drop down box will appear. The (Change Program) link appears in the upper left hand corner of your Internet Explorer window, below the toolbar.

Click the appropriate program from the drop down menu and click the Go button. Now you are in the new program. The Program name will appear on the top of the screen in green letters.

Quick Tabs

These are the many tabs running across the top of the screen.

New

The New tab is a quick way to access functions including: Add New Entity, Record Efforts, Take Assessment, Add Referral. This is one of a number of paths which allow users to complete these functions.

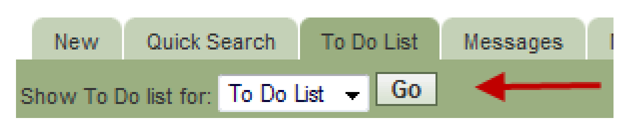
Quick Search

When you click the Quick Search tab, search boxes appear below the tabs.

The quick search can be a little tricky to use at first, but one you become comfortable, it can be the most efficient way to work with Participants and Entities. If you are looking for a specific participant, enter their full or partial last name in the Enter Search Term(s) box. If you want to get a full list of Participants in the Program, just leave the Enter Search Term(s) box blank and click the search button. To search within Programs, Entities, Groups, or Reports change the selection in the “within” drop box. The “in” box on the right closest to the search button determines where the search is being performed. The search can be specific to a selected Program (PAT, EHS, etc.) or across the entire Site.

To Do List

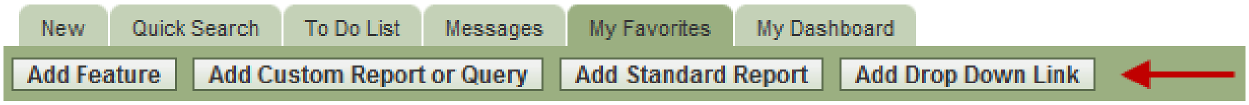
The To Do List tab includes any reminders that you or other staff have entered through Recording Efforts, Assessments, and Adding Referrals. This feature is a great time management tool for staff, and can be used by program managers who want to use ETO as a tool for staff supervision. To see a list, choose the person from the To Do List dropdown box and click the Go button. Once in the To Do List, you can select the time period you would like to view including today, next 7 days, next 31 days, last 31 days, and more.



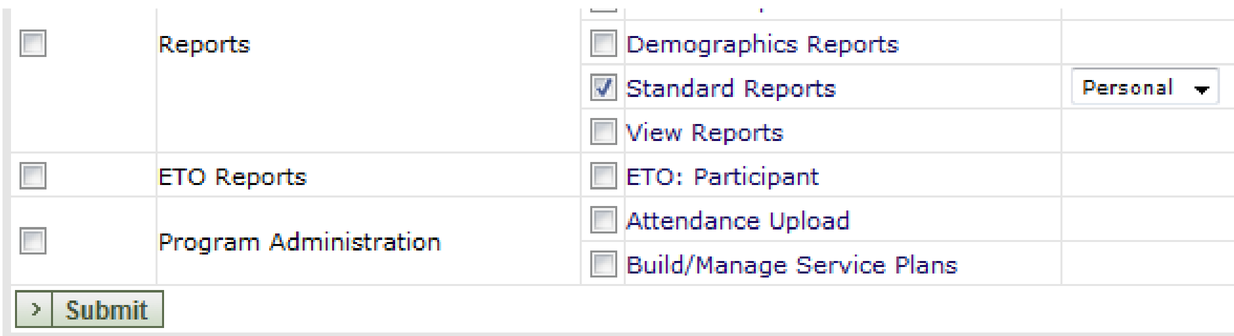
Messages

The Messages tab is like an internal email within the ETO to send text to other ETO users within the system. Messages can be sent to an individual or to all users associated with a program. The tab turns red when new messages arrive. Click the appropriate button to create or read messages.

My Favorites

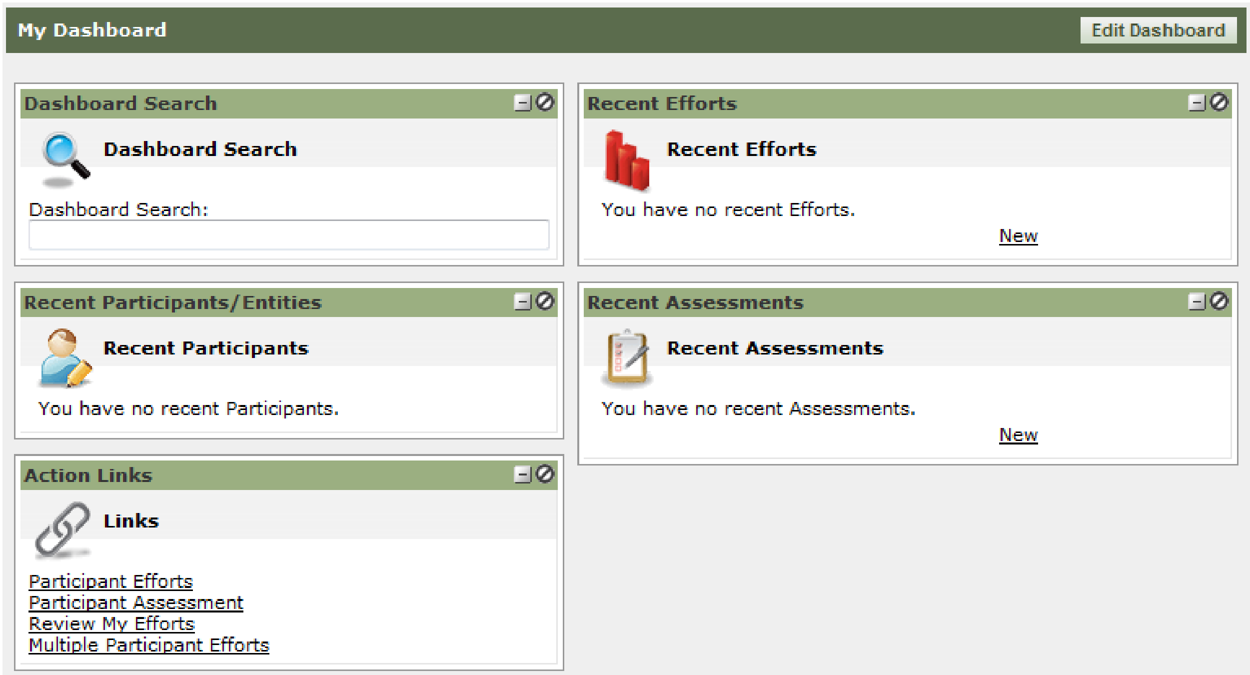


My Favorites screen is a place where you can add links to the features and reports you use most. You can add to the My Favorites screen by clicking the appropriate button (Add Feature, Custom Report, Standard Report, Drop Down Link) and clicking on the feature you would like to add. When you click a feature, a drop down box will appear in the right hand column. Click the submit button at the bottom of the screen when you have made your selection.



My Dashboard

The My Dashboard screen contains five sections or boxes. From the **Dashboard Search** box in the top left, you can search for participants or other items using specific terms. The Dashboard Search is like doing a Google search within ETO system. In the **Recent Participants/Entities** section, **Recent Efforts** section, and **Recent Assessments** section you can see the most recent things you have added or updated in ETO. The **Action Links** section on the bottom left hand side of the screen contains links to frequently used functions in ETO. Clicking the link will take you directly there.



My Dashboard may be customized by the user to add, remove, or move components called ETO Parts, such as my caseload, recent assessments, recent efforts, recent referrals, reports, and more. Click the Edit Dashboard button at the top right hand side of the screen to edit the page. When in the Edit Dashboard mode, users can click and drag ETO Parts to display in different places on their screen. To add ETO parts, the user must click the Add ETO Parts button at that appears at the top right hand corner of the page when in the Edit Dashboard mode then select ETO Parts from the ETO parts catalog which appears on the left hand side of the screen.

If you would like, you can set the My Dashboard screen as your landing page, or the page that will appear when you log on to ETO. To do this, click on the Manage My Site feature, below Site Administration on the Navigation Bar.

Navigation Bar

The Navigation Bar is the green bar on the right side of the screen. When collapsed, it is hiding with a green arrow. Click on the arrow to expand the box for the full box to appear. To collapse the full box, click on the arrow again.

The Navigation Bar is another way besides the quick search and new tabs that you can find your way to places in ETO. Clicking on any row of the box will show a drop down menu of more specific places you can go.

If you want the Navigation Bar to be expanded or collapsed by default when you log in, change your preferences by clicking on the My Account link at the top of the screen. After clicking on the My Account link, select the Manage Personal Settings link. Auto Collapse Navigation Bar is the first section on this page, select your preference here.

Links in the Upper Right Corner

Log Off | Home Page | My Account | Help | Chat

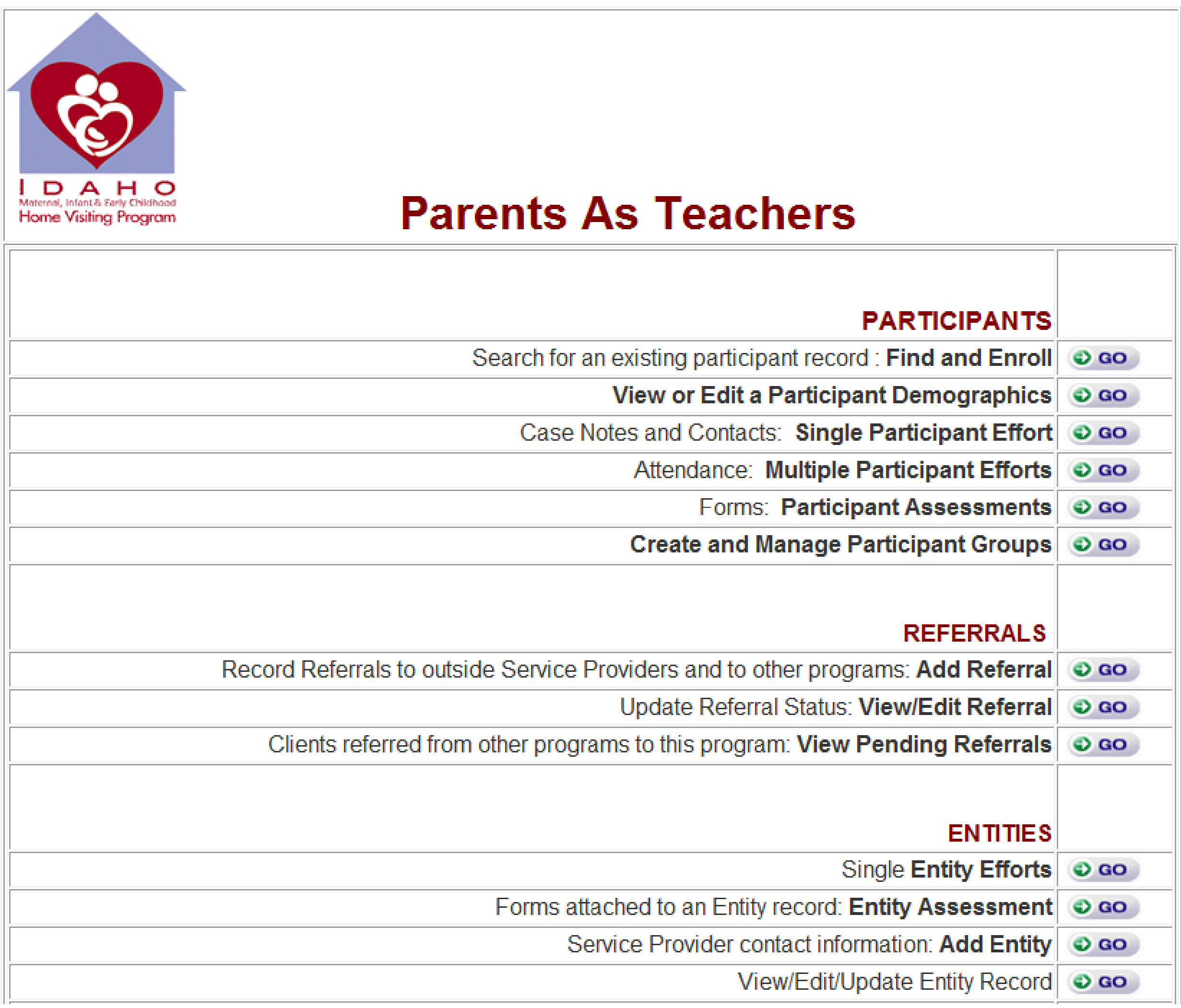
Log Off

When you leave your workstation or shift attention to other activities, always log off to securely end your session. Protecting client information is of the utmost importance and logging off properly is an important security and privacy measure.

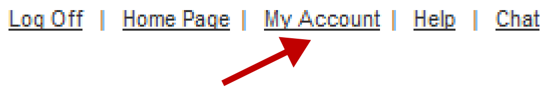
Log Off | Home Page | My Account | Help | Chat

Home Page

This returns the user to the home page. Your home page screen includes links to frequently used functions and will look something like this:

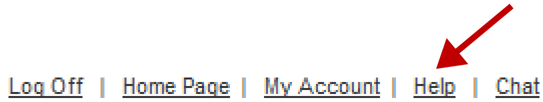


My Account



Click the My Account link to change your ETO password, access your Live Office preset password, or select preferences, like whether the Navigation Bar is expanded or collapsed by default when you log in.

Help



This link takes you to a large manual that contains documentation on all features and reports, recorded trainings, FAQs, and much more. For best results, use quotation marks around phrases when searching to return results based on a string of words. Another way to get help is to click the support link on the bottom right hand side of the screen. This will allow you to email or call support staff to get help with your questions.

Chat

Customer support representatives are available to troubleshoot issues about the software including issues from functionality to technical problems with the software. When chatting in inquiry questions, it is very important to provide a detailed account of the problem as well as what Enterprise (ours is Idaho MIECHV) and program (Centralized Intake, PAT, etc.) you are using. Live Chat is available Monday through Friday from 7am MT to 3pm MT (6am PT to 2pm PT).

Links across the Bottom

These links direct users outside of the ETO site. Links are found on the bottom right hand side of the screen, except for the colorful Social Solutions link on the bottom left.

Social Solutions

By clicking on the Social Solutions green and blue logo you will be linked to the ETO company website. The recorded webinars found here on the News & Events page are free to users.

Online Community

The online community is a networking site for ETO users that includes forums to post questions regarding usage of ETO.

Training Calendar

View the schedule of free webinar trainings, user groups, and fee based training events that teach you how to use ETO. Click on any calendar item to see details and to access the link to register. All times are listed in Eastern Time unless otherwise specified. Registration is required 2 or more hours prior to session start time for free events.

Support

This is another way, besides the clicking the help or chat links in the upper right hand corner, to ask questions and get help using ETO. Click to send an email to the support team – average response time is about 30 minutes, but allow for 2 hours. Hours of operation are 6am-6pm MST Monday through Thursday, and 6am-4pm MST on Friday. If you need a more immediate response, please call 866.732.3560 x 2. If you prefer, you can also send an email directly to support@socialsolutions.com. Be ready to provide information about the site you are using and a detailed description of the technical problems you are encountering. When confronted with technical problems, e-mailing, chatting, or calling social solutions to troubleshoot will likely be the most efficient method to resolve technical problems.

Search Options

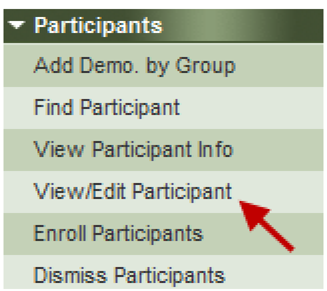
There are a few different ways to search for things (participants, entities, etc.) in ETO:

Quick Search

Quick Search is one of the green tabs at the top of the screen. The quick search can be a little tricky to use at first, but one you become comfortable, it can be the most efficient way to work with Participants and Entities.

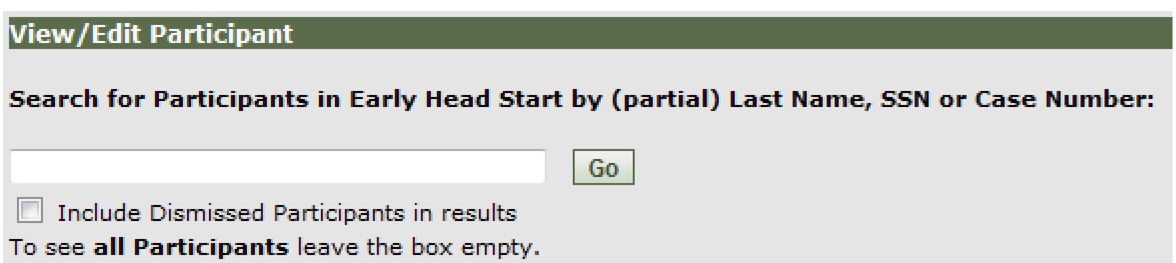
If you are looking for a specific participant, enter their full or partial last name in the Enter Search Term(s) box. If you want to get a full list of Participants in the Program, just leave the Enter Search Term(s) box blank and click the search button. To search within Programs, Entities, Groups, or Reports, change the selection in the “within” drop box. The “in” box on the right closest to the search button determines where the search is being performed. The search can be specific to a selected Program (PAT, EHS, etc.) or across the entire Site.

View/Edit Participant



Below the Participants section on the Navigation bar, there is a View/Edit Participant button. Clicking this button will let you perform a program specific search of active participants. This will allow you to view participants in the system and edit their information as needed.

Clicking the View/Edit Participant link will show you this page:



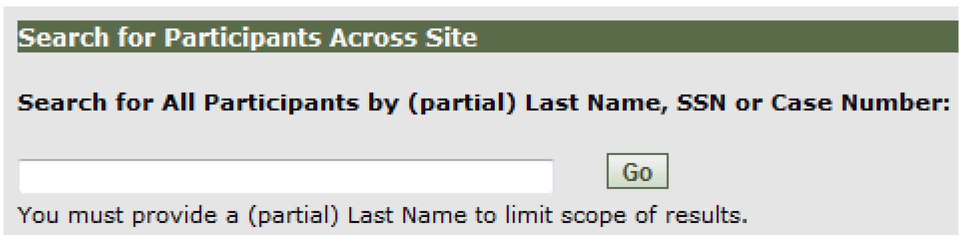
Enter the last name (or part of the last name, such as “Smi” for “Smith”), SSN, or case number and click the Go button. To see all Participants, leave the search box empty and click the Go button. To include participants that have been dismissed in your search, check the box below the search criteria box. Once you push the Go button your search will provide you with a list of participants like this:

	Name	DOB	SSN	Case No.
1.	GO Bagodonuts, PlainJane	7/4/1994	unknown	10259
2.	GO Fake, Amina	11/14/2011	unknown	10340
3.	GO Fake, April	9/1/1985	unknown	10308
4.	GO Fake, August	9/1/2012	unknown	10309

Find Participant

Below the Participants section on the Navigation bar, there is a Find Participant button. Clicking the Find Participant button will search for active and dismissed participants within the programs you have permissions to view.

Clicking the Find Participant link will show you this page:



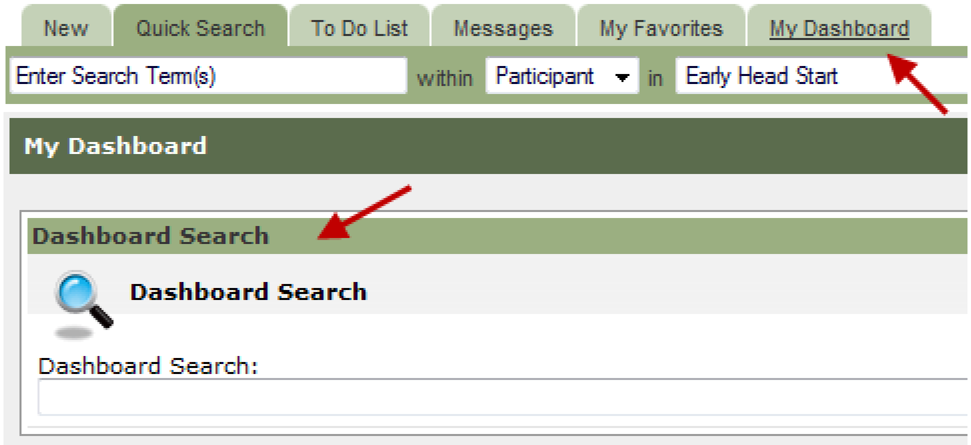
Unlike other searches, some search criteria must be entered into the box before pressing the Go button. If you leave the box blank, the search won't work.

Once you push the Go button your search will provide you with a list of all participants, those currently enrolled and currently dismissed.

16.	Go	**Fake**, Bertha	4/16/1985	unknown	10302	Currently Enrolled
17.	Go	**Fake**, Betsy	1/1/1995	unknown	10245	Currently Dismissed
18.	Go	**Fake**, Blue *	1/2/2010	unknown	10285	Currently Enrolled
19.	Go	**Fake**, Bob	unknown	unknown	10322	Currently Enrolled
20.	Go	**Fake**, Bobby	5/5/1987	unknown	10267	Currently Dismissed
21.	Go	**Fake**, Bobby	1/1/2011	unknown	10270	Currently Enrolled

Dismissed participants are flagged with red text. Note when doing a Find Participant search, the screen is a view only screen. To enter or edit participant information you will need to use the View/Edit Participant search.

Dashboard Search



Clicking on the My Dashboard tab at the top of the screen will display a Dashboard Search section on the left hand side of the screen. Enter a partial or full name and wait for a moment, a list of results will appear below the search box. This is similar to the Google search. Select the result you are looking for after typing in a Search term. The Dashboard search looks across all programs the user has access to, and includes Participants who are no longer active. Click on a name in the search result and be directed to that Participant's Dashboard. By looking at the "Programs" ETO Part, you can see in which program(s) the Participant is currently enrolled.

Participant Dashboard

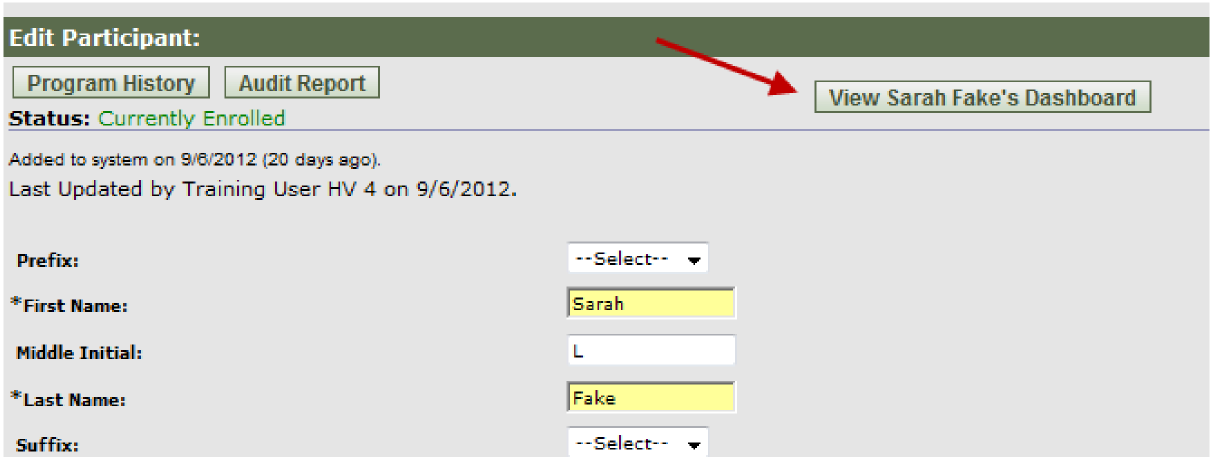
There are a few different ways to get to the Participant Dashboard:

- Search for the participant using **Quick Search** or **View/Edit Participant** (see the search options section above).
- From **My Dashboard** (or another **Participant's Dashboard**) you can do a dashboard search in the Dashboard Search section on the top left, or you may be able to see the participants name in the Recent Participants Section below the Dashboard Search box on the left hand side of the screen. By double clicking on the participants name in your dashboard, you will be taken to the participant dashboard page.

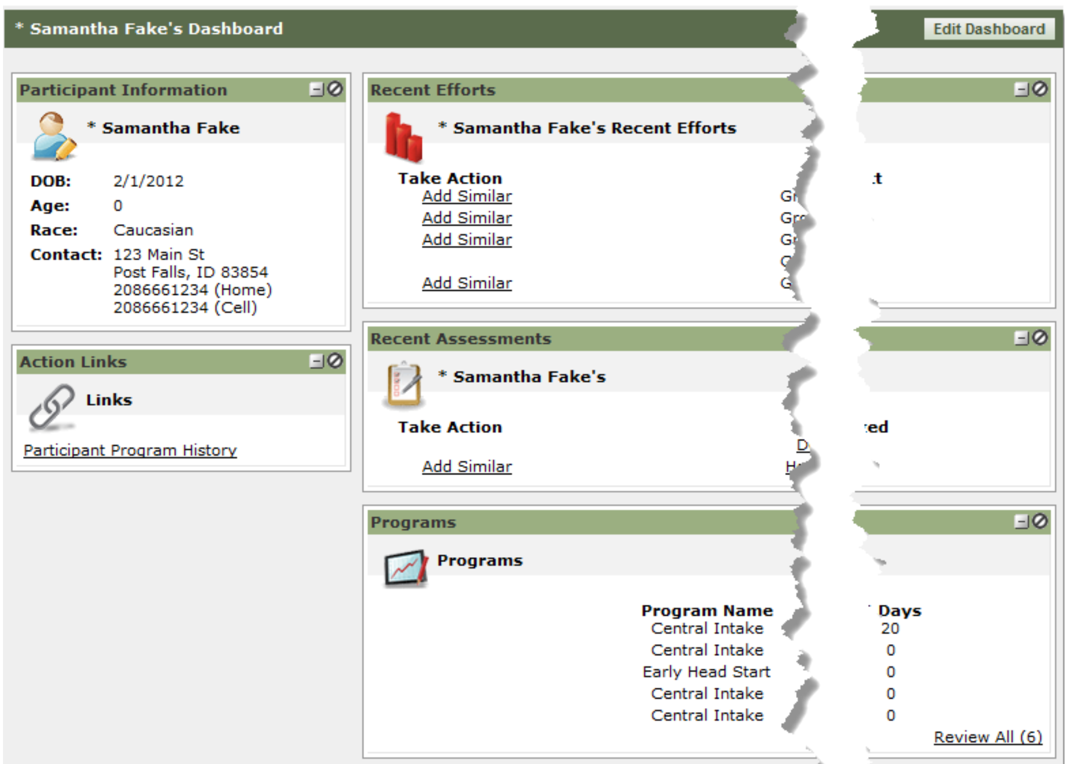
No matter which search option you use to find the participant, you should be able to locate their name, sometimes on a list:

	Name	DOB	SSN	Case No.
1.	GO Bagodonuts, PlainJane	7/4/1994	unknown	10259
2.	GO Fake, Amina	11/14/2011	unknown	10340
3.	GO Fake, April	9/1/1985	unknown	10308

Once you find their name, click directly on their name or the Go link to the left of their name to bring up this screen:



Click on the View (Participant's Name) Dashboard button in the top right hand side of the screen to take you to the Participant's dashboard:



Similar to My Dashboard, the Participant Dashboard contains the participant's most recent assessments and efforts, as well as demographic information. You can add or remove ETO Parts to the Participant Dashboard by clicking the Edit Dashboard button on the top right hand side of the screen.

Enrollment and Intake Functions

This section may be most relevant to supervisors or data entry staff

Adding a Participant or Household into ETO Central Intake Program

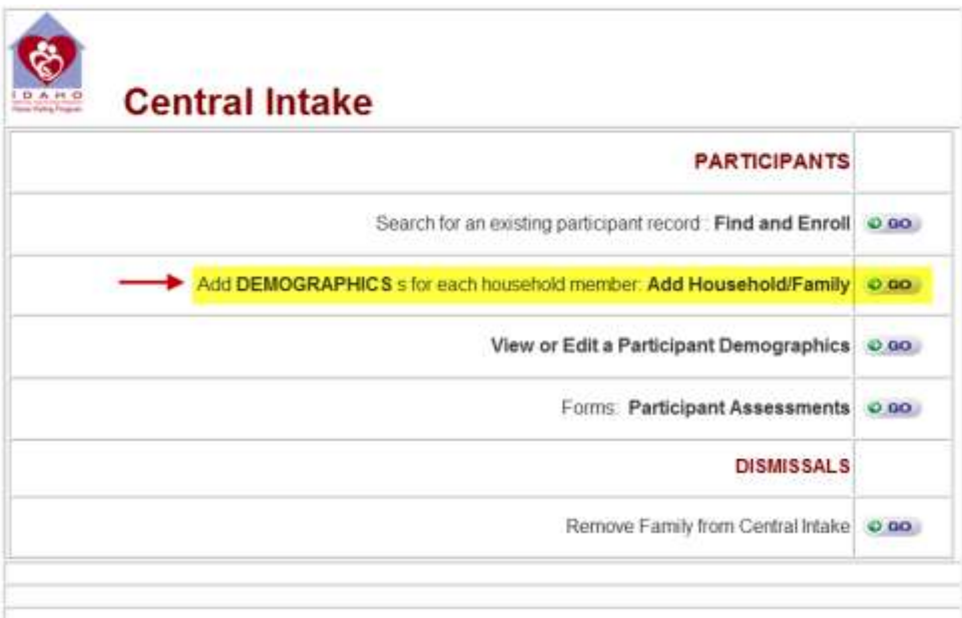
To help prevent adding a participant that is already in ETO (duplicates), it's important to search to make sure an individual does not already exist in the software before going to Add Participant. You can search for a participant using the:

- **Quick Search** field under the green quick tabs at the top of the screen using participants last name,
- **View/Edit Participant** or **Find Participant** buttons from the Green Navigation Box halfway down the screen on the right hand side, or from the
- **Dashboard Search** located on the left hand side of your My Favorites Screen.

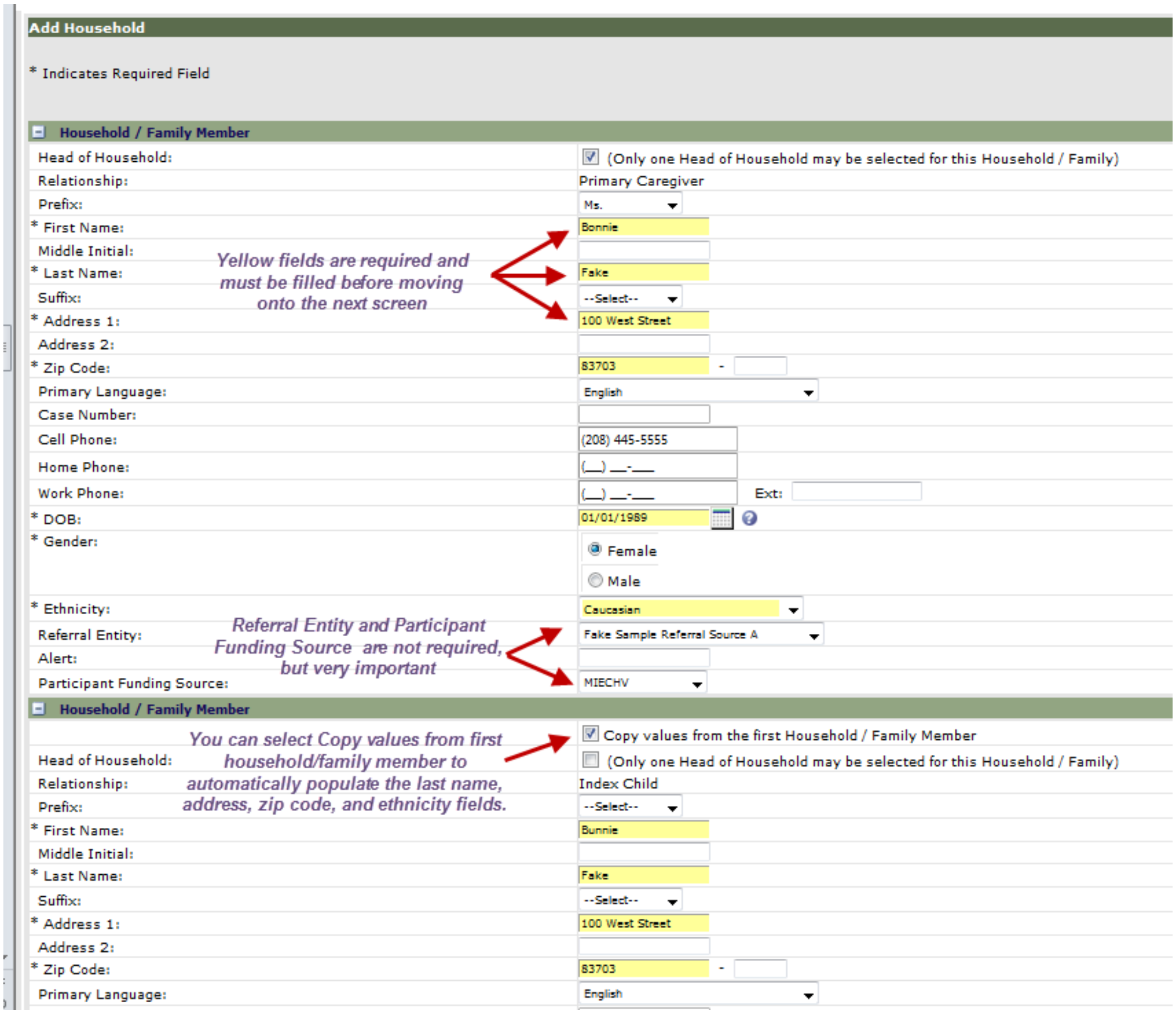
For more on using search functions see the search options section in this manual.

If you searched and **didn't find** the person's name and you now know that a participant does not already exist in the system you can move forward to add a participant. Participants are entered into the ETO system into Central Intake, in the appropriate site - North or South Central Idaho. You will only be able to see participants in the central intake within your service delivery area (target community).

To enter households into ETO, go to the home page within the central intake program. Other household members can be added later, after the participant is dismissed from the central intake program and assigned a program (EHS, PAT, or NFP). Remember household is synonymous with family in ETO. Once households are entered into Central Intake, assessments can be completed such as the enrollment application or screening forms.



After enrolling participants into the central intake program using the add/edit household feature, you must enter participant demographic information for the participants. Multiple household members can be added once in the central intake. Once you are to the Add Participant page from one of the ways listed above, enter the data into the fields displayed. Once you have entered the data, click the Submit (Add Participant) button at the bottom of the page.

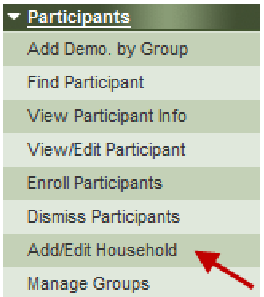


A pop-up confirmation will appear stating that the Participant has been added to the central intake. Click OK. You will then be redirected to take assessments. Completed enrollment application or screening forms should be now completed to help identify which program the participant will be enrolled in or where to place them on a waitlist.

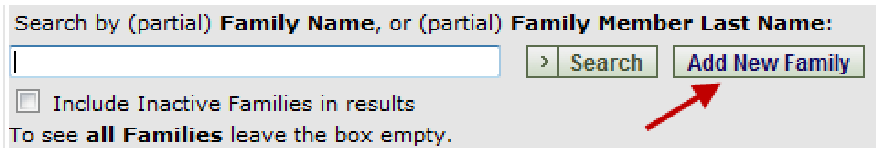
A unique participant record for the Primary Caregiver and a unique participant record for the Target/Index child(ren) will be created. If desired, other non-target children and family members can be added. A unique participant record will be created for these participants. The Family Relationship Table will denote the type of client (Primary Caregiver, Target Child, values representing other family members' relationship to the Primary Caregiver), for client management and reporting purposes.

Another way to create a new household/family

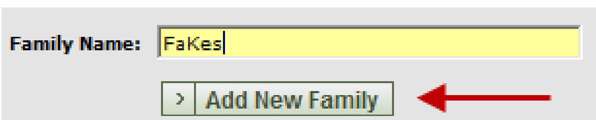
Create a household when no family members are in the system from the green navigation box on the right hand side of the screen. Click Participants, Add New/Edit Household.



Click the Add New Family button.



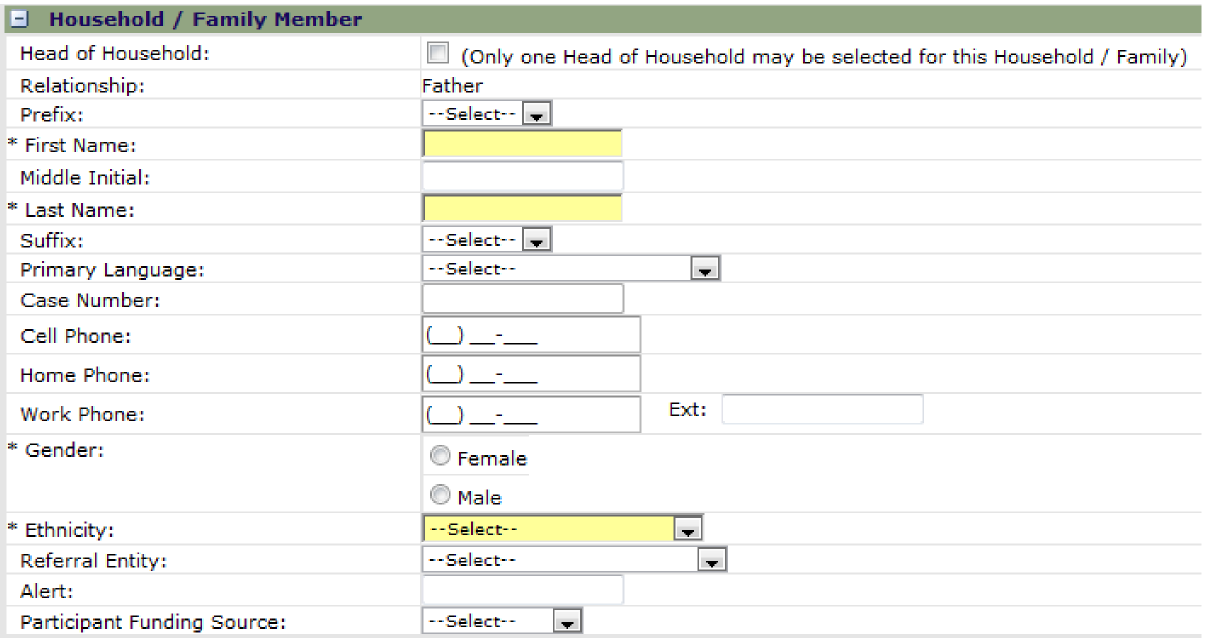
Type the name of the new Family in the yellow box and click the Add New Family button.



A box indicating you have successfully added the family will pop up. Click OK. Now you have created the family unit, and need to add specific members to the family. To do this, click the Add New Family Member link.

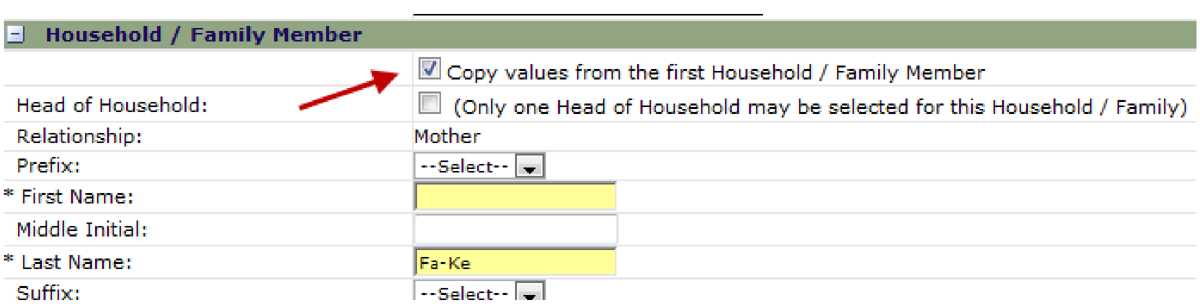
Next click the “Click to Add Household / Family Member by Family Relationship” link. Choose the appropriate family relationship (i.e. mother, grandmother, child, etc.) of the person you wish to add.

A Demographic field will drop down. Complete the Demographic fields for the first member of the family. Yellow fields and fields with asterisks are required fields. Check the box if the Participant is the Head of Household.

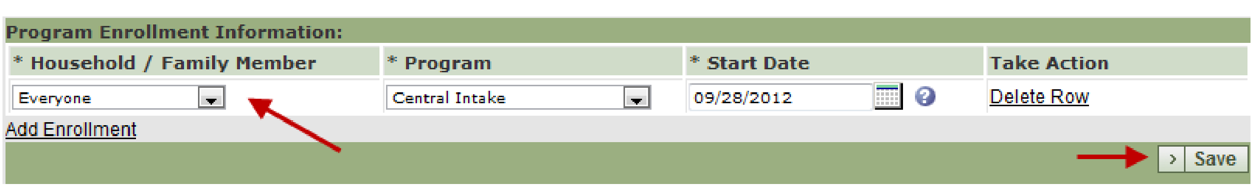


Repeat the steps (clicking the Add Household/Family Member by Family Relationship link and filling out the corresponding demographics) for each family member.

If applicable, check the box to copy the values from the first household/family member. This will auto-populate the last name, address, zip code, and ethnicity of the first family member to this member as well.



Once you have added all the family members and completed their demographic information, complete the program enrollment information at the bottom of the screen. Note that you can enroll everyone or only some members of the family into the program in the first drop down box. When multiple household members are added at the same time, these household members are grouped into a "family." By default the family is identified by the first and last name of the primary caregiver and the word "family." For example, when the primary caregiver is Sandra Fake, index child is Angela Fake, and the Boyfriend is Robert Fake, and all were added at the same time, this family will be the "Sandra Fake Family." Click the Save button on the bottom right hand side when you are done. Other household members can be added later, after the participant is dismissed from the central intake program assigned a program (EHS, PAT, or NFP).



Family Groupings - Uniting Participants

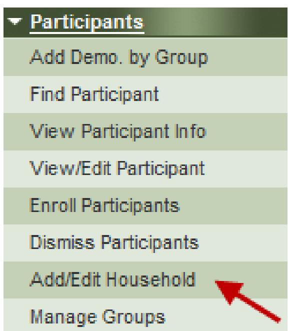
This may be relevant to supervisors, home visitors, or data entry staff

The terms "Family" and "Household" are used interchangeably in ETO. While most households have multiple participants, it is possible to use this feature to enter just one Participant in the case of a single person household.

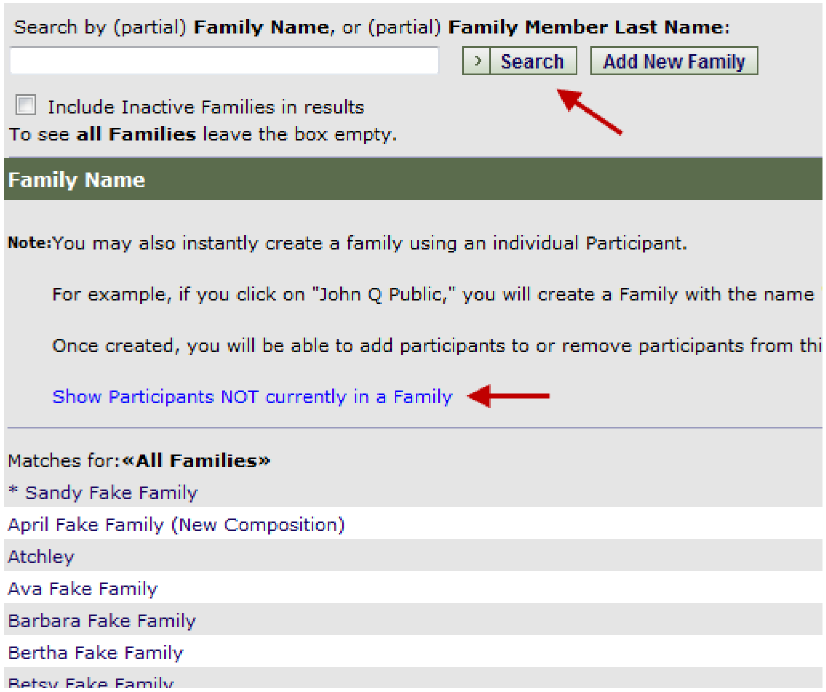
This feature is typically used to do one or more of the following:

- Create a new family made up of participants in the site (e.g. grouping individual participants together that already exist in ETO)
- Add participants in the site to an existing family/household
- Add participants not yet in the site to an existing family family/household
- Remove a participant no longer in the family
- Modify the name or family relationships in an existing family
- Disable a family (when the family is dismissed, but you don't want to delete their records)
- Delete a family (deleting the family grouping, not the participant records).

To create a new family when at least one person in that family is already in ETO following these instructions. From the green navigation bar on the right hand side of the screen, click **Participants**, then **Add/Edit Household**.

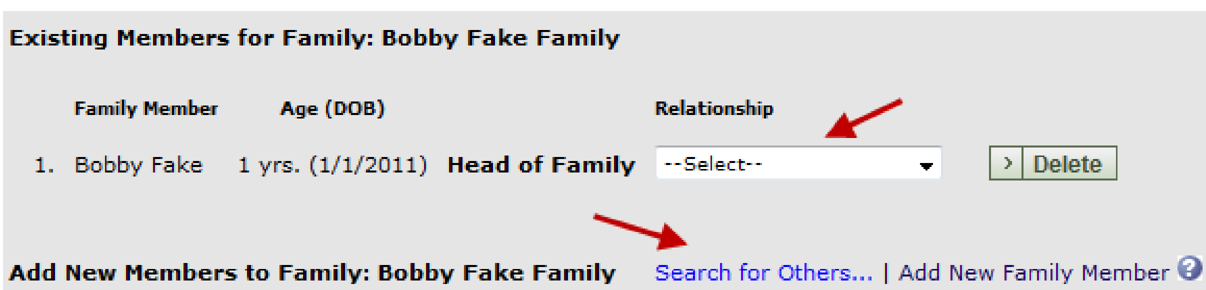


Click the Search button (enter search criteria or leave it blank to return a complete list of families). Click the blue link "Show Participants NOT currently in a Family"

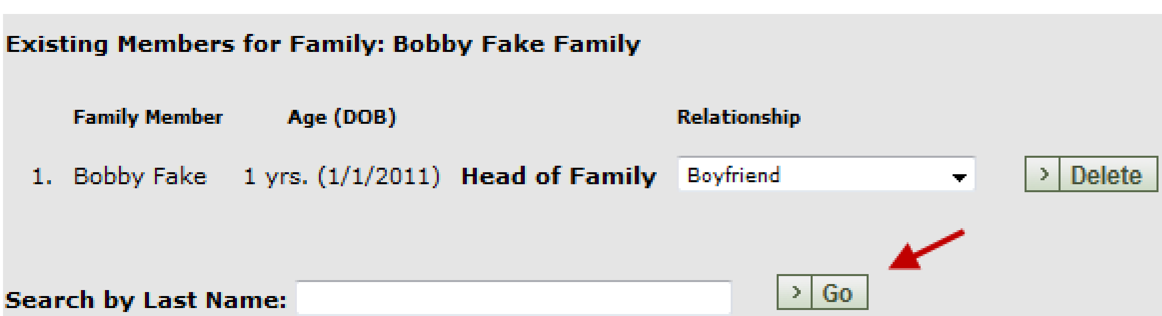


Click on the name of the Participant who you want to be the Head of Household. This will take you to the screen below. Click the button next to the family name that says “Work With Family”.

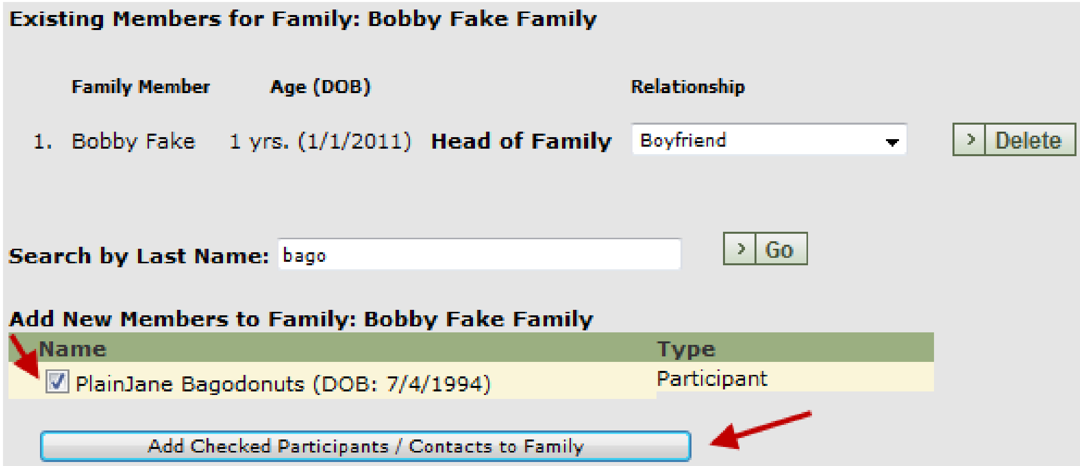
To clarify who the head of household is (father, mother, etc.) choose the appropriate response from the relationship dropdown menu. To add family members to this family who are already entered into the ETO central intake program, click the blue link that says “Search for Others.” To add new family members, not yet been entered into ETO click on the “Add New Family Member Link.”



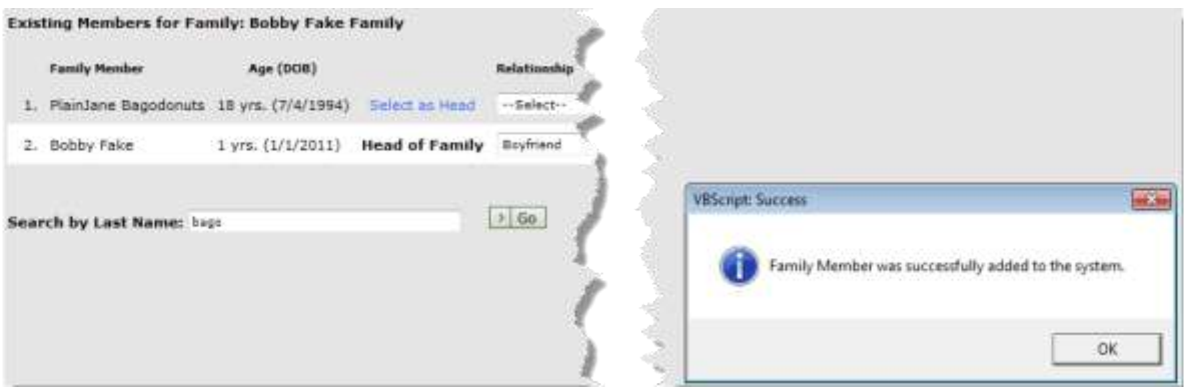
Click the “Go” button to see a list of all Participants, or enter a specific last name or partial name to narrow the search.



Check the boxes for the Participants to be added to the family and click the Add button. You can add more than one family member at a time.

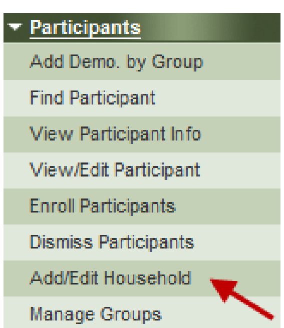


Once you click the add button a box will pop up saying you have successfully added the family member to the system. Once you have clicked OK, you can indicate the relationship of the new family member in the dropdown box. If there are other family members to add, repeat the steps.



Adding a person who is not in ETO to an existing household in the system

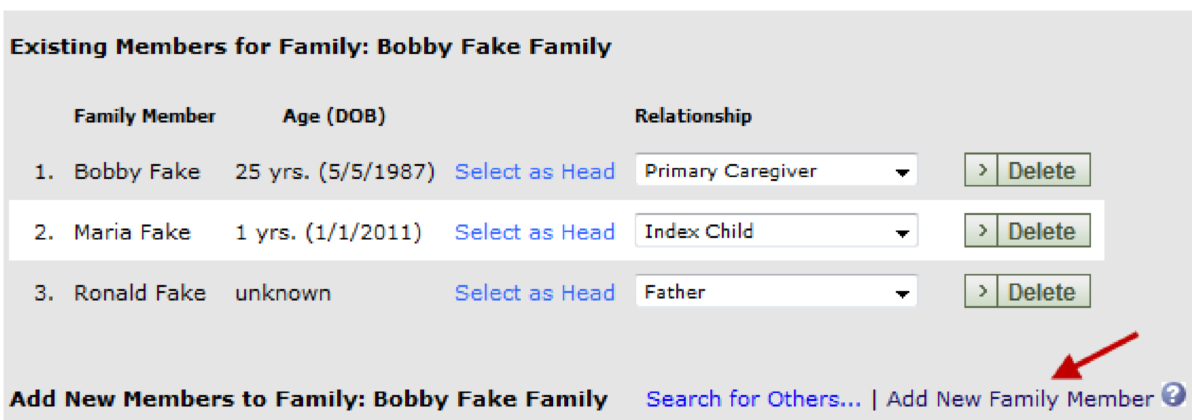
From the green navigation bar on the right hand side of the screen, click **Participants**, then **Add/Edit Household**.



Click the Search button (enter search criteria or leave it blank to return a complete list of families).

Click on the name of the Family you want to add a member to. This will take you to the screen below. Click the button next to the family name that says "Work With Family"

This will show you a list of current family members. From here you can edit or delete existing family members. Clicking the blue search for others link allows you to add family member that are already in ETO. Click the black Add New Family Member link to add people who are not in ETO as new members to the family.



Assigning Participants to a Program

Supervisors will most likely perform this function.

Once households are entered into Central Intake, you should complete the application or enrollment forms in the central intake program.

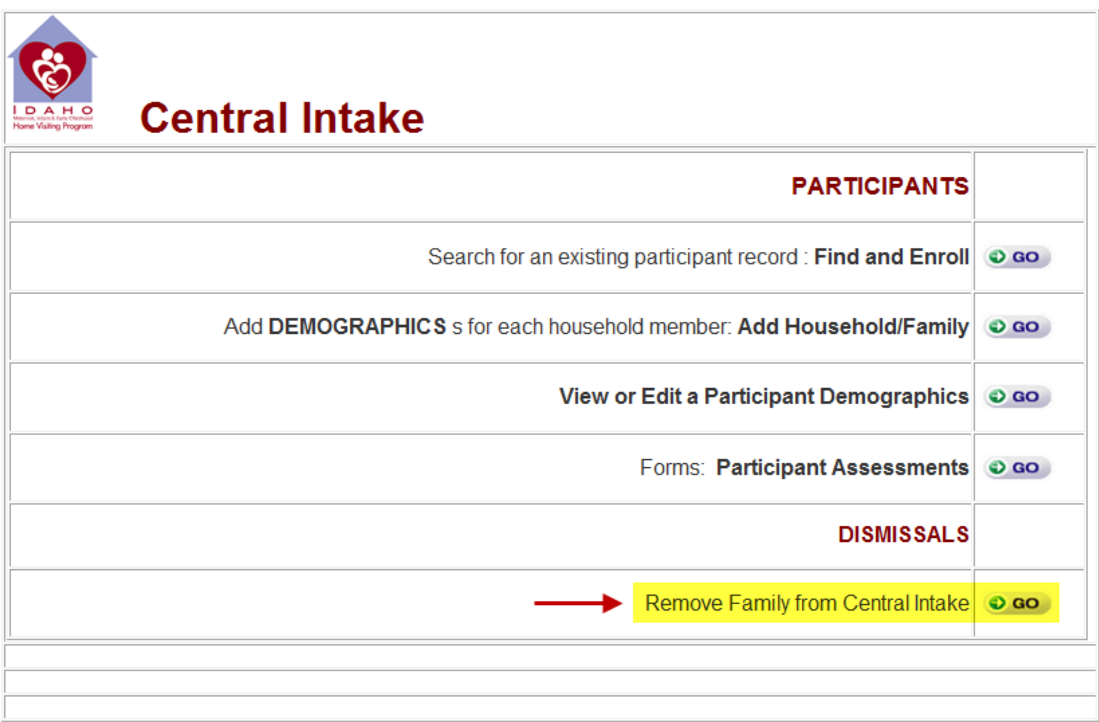
- For programs located in North Idaho, agencies should complete the Home Visiting for Young Families Application Form for all households enrolled in the central intake program. Programs should utilize the *Centralized Intake Processes and Procedures* dated XX-XX-XXXX to determine which program the household/family will be enrolled in.
- For programs located in South Central Idaho, agencies should complete their program specific screening and enrollment forms using the Take New Assessment function described below for all households enrolled in the central intake programs. The screening/enrollment assessments will assign points to the participants to help supervisors assess enrollment priority.

After it is determined to which program (EHS, PAT, or NFP) the participant will be assigned from central intake, the participant must be dismissed from the central intake program to the assigned program (EHS, PAT, or NFP) waiting list (Unless Centralized Intake Processes and Procedures indicate differently).

Dismissing from Central Intake Program to Assigned Program

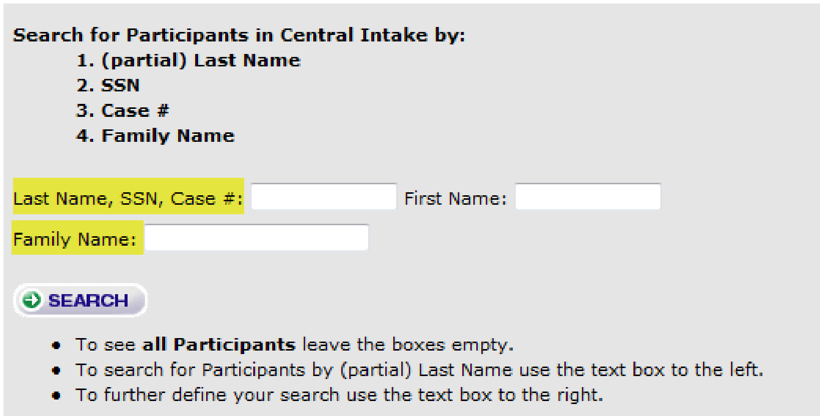
Dismissing a Participant from a program gives them an end date in the program. It does not delete them from the ETO Before a participant can be enrolled in a home visiting program, they must first be dismissed from the Central Intake. Dismissing a Participant from Central Intake moves their record from the Central Intake Program to their assigned home visiting program (EHS, PAT, or NFP). There are a few different ways to dismiss participants from the Central Intake Program.

A simple way to dismiss participants from the Central Intake Program is to go to the **Home Page** in the Central Intake Program and select the Remove Family from Central Intake option by clicking Go. There are other options for dismissing participants from the Central Intake Program as described later.



You will be prompted to search for the participant you would like to dismiss from the Central Intake Program. You have the option to search for individual participants or family. For either search, you must to select each member of the household and Click on the “Dismiss (Same Date + Reason)” button on at the bottom of the page.

Remember when multiple household members are added at the same time, these household members are grouped into a "family." By default the family is identified by the first and last name of the primary caregiver and the word "family." For example, when the primary caregiver is Sandra Fake, index child is Angela Fake, and the Boyfriend is Robert Fake and all were added at the same time, this family will be the "Sandra Fake Family."



Search for Participants in Central Intake by:

1. **(partial) Last Name**
2. **SSN**
3. **Case #**
4. **Family Name**

Last Name, SSN, Case #: First Name:

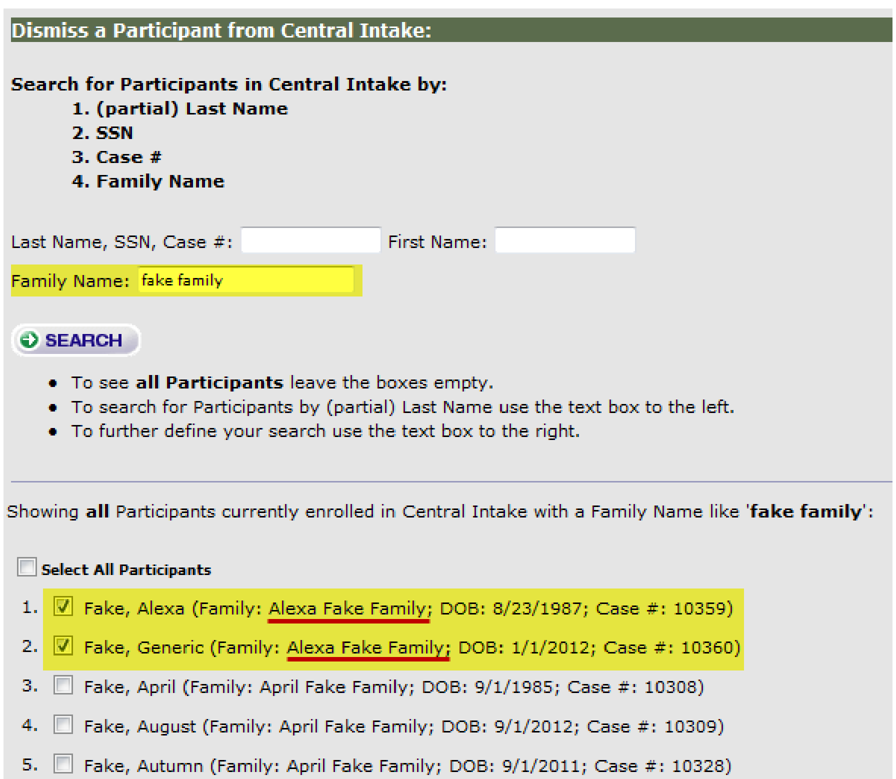
Family Name:

SEARCH

- To see **all Participants** leave the boxes empty.
- To search for Participants by (partial) Last Name use the text box to the left.
- To further define your search use the text box to the right.

DISMISS (DIFFERENT DATES + REASON) DISMISS (SAME DATE + REASON)

Family Name Search in Central Intake Program Dismissal



Dismiss a Participant from Central Intake:

Search for Participants in Central Intake by:

1. **(partial) Last Name**
2. **SSN**
3. **Case #**
4. **Family Name**

Last Name, SSN, Case #: First Name:

Family Name: fake family

SEARCH

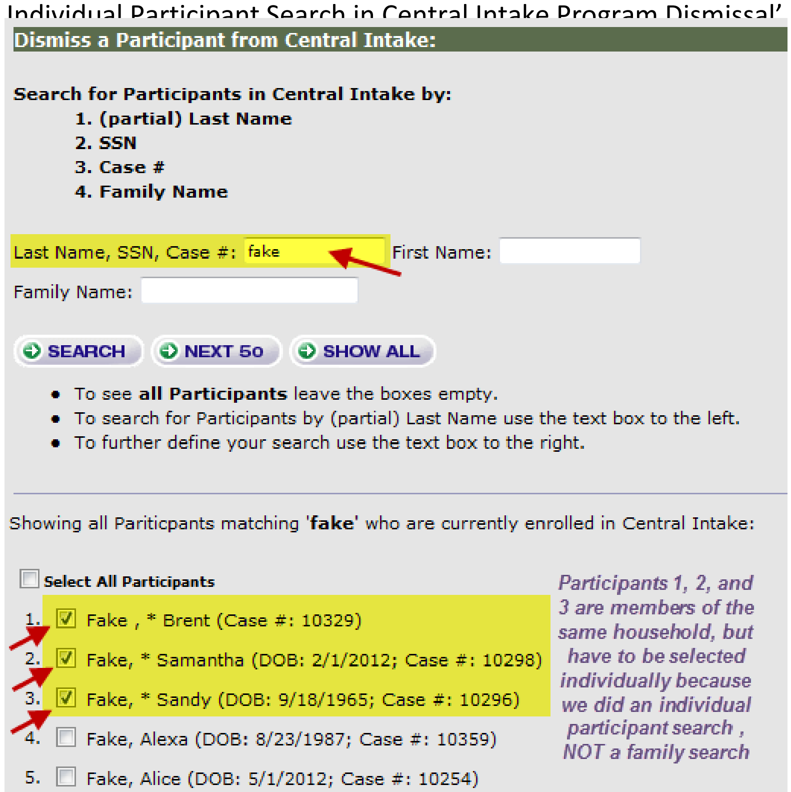
- To see **all Participants** leave the boxes empty.
- To search for Participants by (partial) Last Name use the text box to the left.
- To further define your search use the text box to the right.

Showing **all** Participants currently enrolled in Central Intake with a Family Name like '**fake family**':

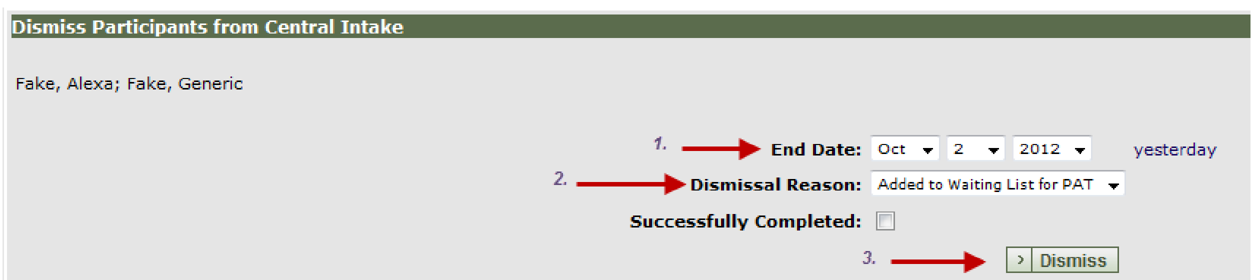
Select All Participants

1. Fake, Alexa (Family: Alexa Fake Family; DOB: 8/23/1987; Case #: 10359)
2. Fake, Generic (Family: Alexa Fake Family; DOB: 1/1/2012; Case #: 10360)
3. Fake, April (Family: April Fake Family; DOB: 9/1/1985; Case #: 10308)
4. Fake, August (Family: April Fake Family; DOB: 9/1/2012; Case #: 10309)
5. Fake, Autumn (Family: April Fake Family; DOB: 9/1/2011; Case #: 10328)

Individual Participant Search in Central Intake Program Dismissal'



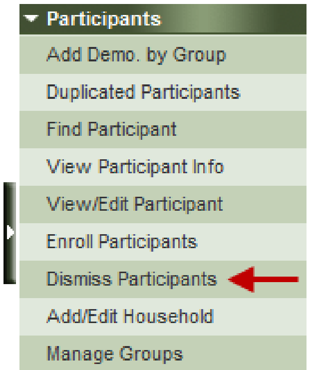
You will be navigated to the Participant Dismissal page. Select the date the participant was referred from the Central Intake Program to the assigned program (EHS, PAT, or NFP), dismissal reason, and click the “Dismiss” button.



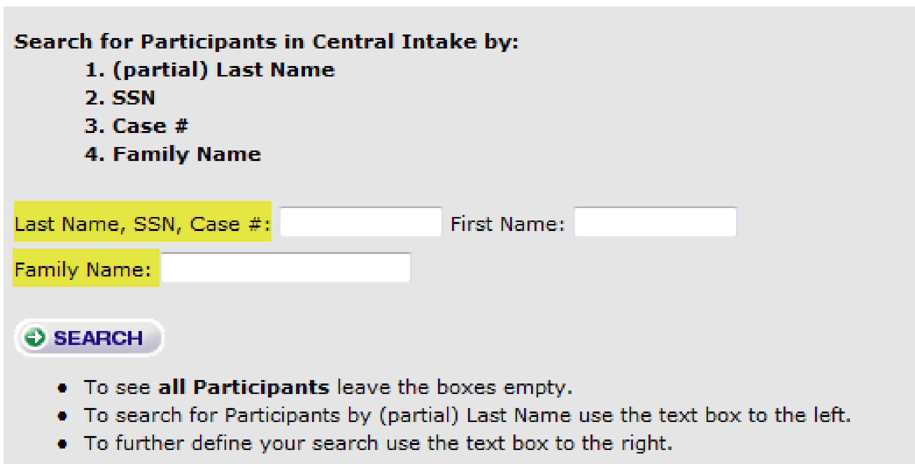
The participant or family is now added to a waiting list in their assigned program (EHS, PAT, or NFP). Please note, once dismissed, the participants are not automatically enrolled into the assigned program (EHS, PAT, or NFP). Participants are placed on a waitlist called the “Pending Referrals List” that can be found each respective program.

Navigation Bar

Another way you can dismiss participants is by using the green **Navigation Bar** on the right hand side of the screen, click Participants, from the drop down list click Dismiss Participants.



After clicking on Dismiss Participants, you will be directed to the “Dismiss a Participant from Central Intake” page. From here search for and dismiss participants using the same steps outlined above.

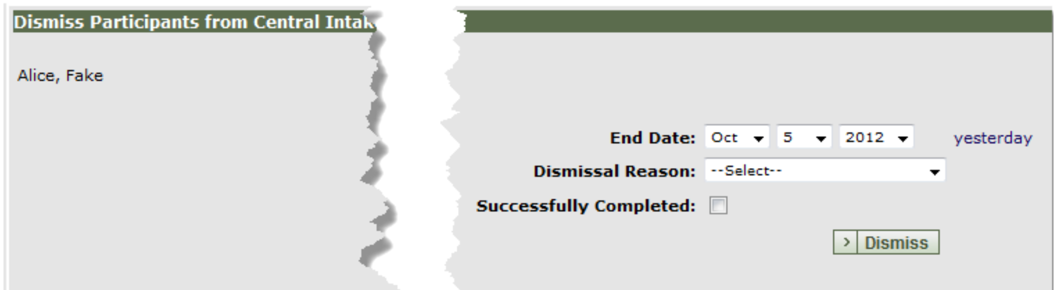


It is important to note, once dismissed, the participants are not automatically enrolled into the assigned program (EHS, PAT, or NFP). Participants are placed on a waitlist called the “Pending Referrals List” that can be found for each respective program. An e-mail will be sent to the supervisor in the assigned program to notify them of the referral.

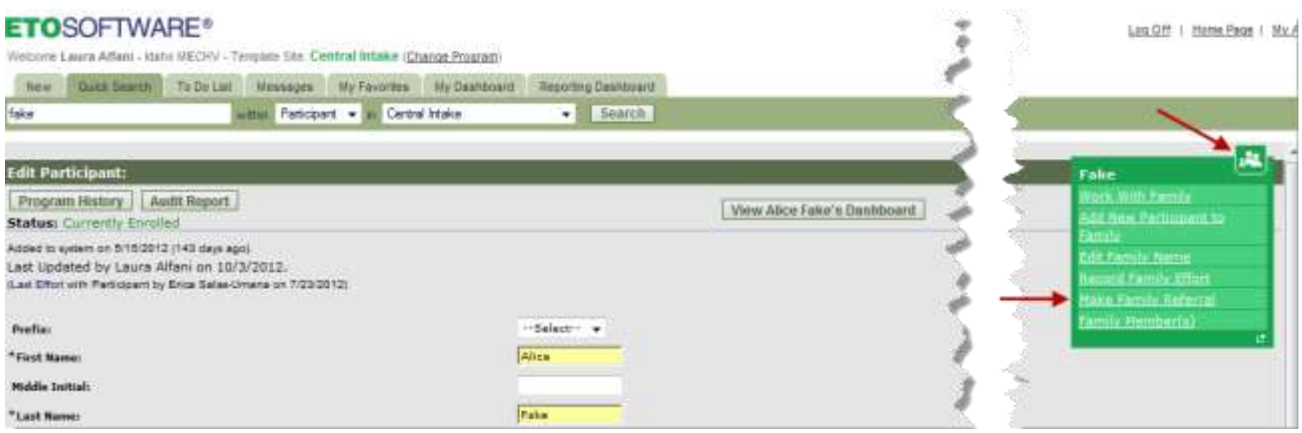
Quick Search

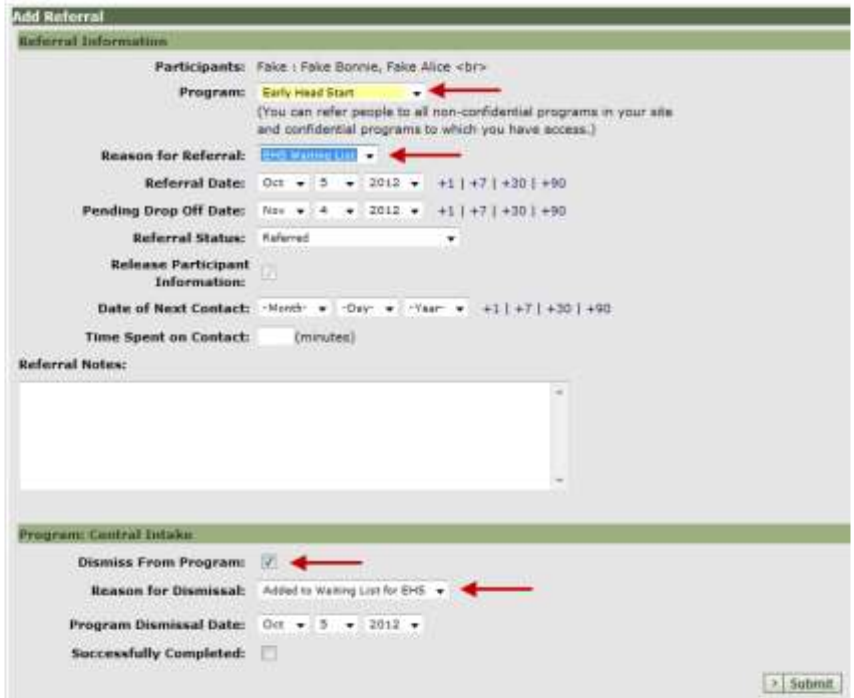
You can also dismiss families from the Central Intake Program to another Program (EHS, PAT, or NFP) using the **Quick Search**. Once you click on the participant’s name you can select Dismiss from Program or select View/Edit. If you click View/Edit you will be redirected to the Edit Participant page. Next click the Green family quick link (upper right) and select Make Family Referral → To Program → Select the ETO Program and Reason for Referral. When referring to another Program, select the Dismiss From Program checkbox and click Submit. If you click Dismiss from Program you will be redirected to the Dismiss participants from Central Intake.

Dismiss From Program (this option may be most appropriate when referring an individual from central intake)



View/Edit (this option may be most appropriate when referring a family from central intake)

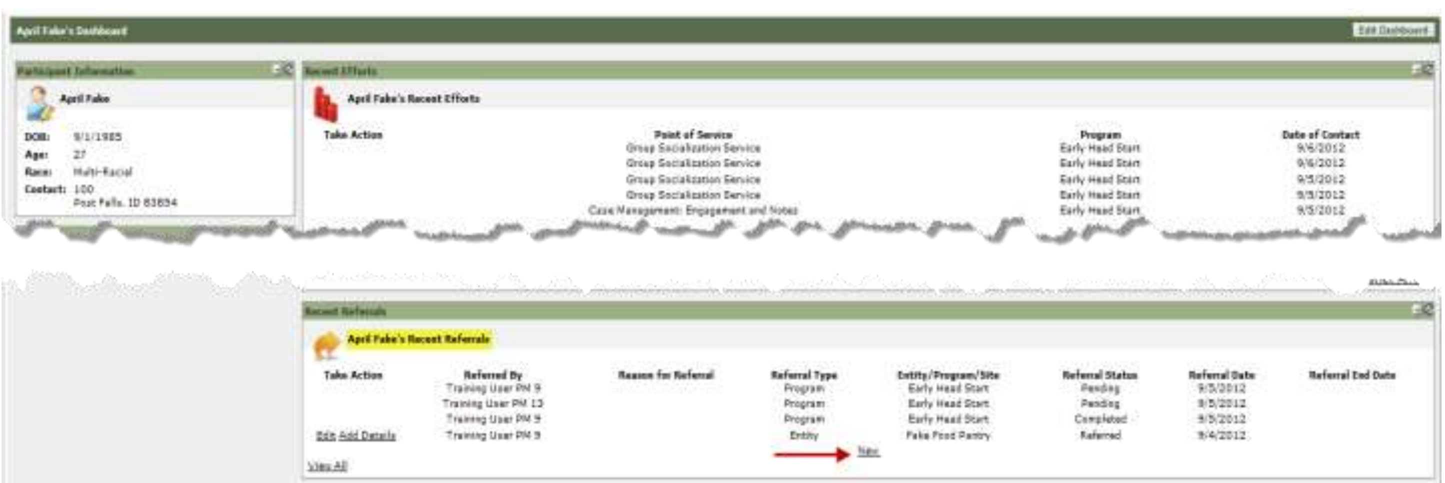




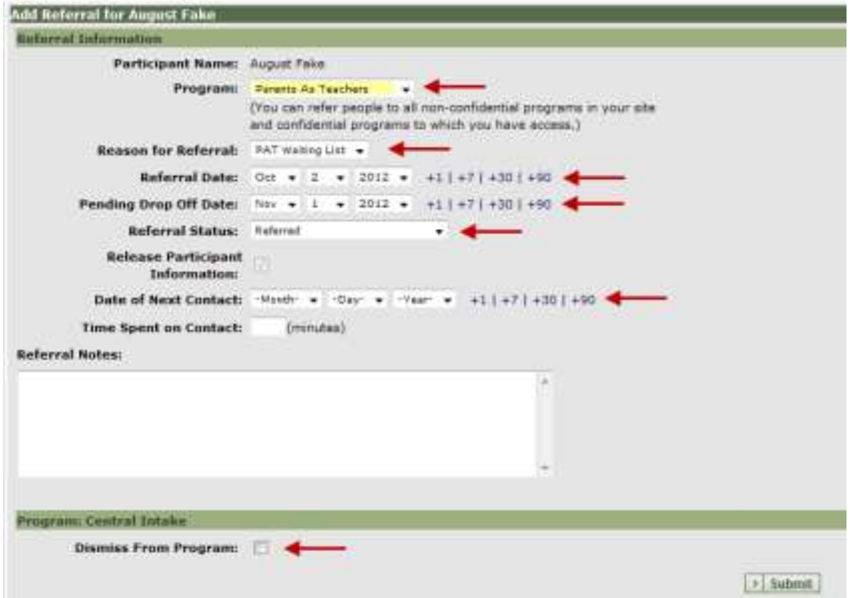
Note that several features (View/Edit Participant, Participant Assessment, Participant Efforts, etc. include the option to "Include Dismissed Participants in results." Once dismissed, you can still access to the records of dismissed participants.

If Dismissing only the Primary Caregiver

Another way you can dismiss the primary caregiver from the Central Intake Program is to go to the Primary Caregiver's Dashboard in the Central Intake Program (see Participant Dashboard section of this guide for help finding the Participant Dashboard) using a referral. In the Recent Referrals ETO Part select the "New" link and then choose "To Program". Next, select the ETO Program and Reason for Referral.

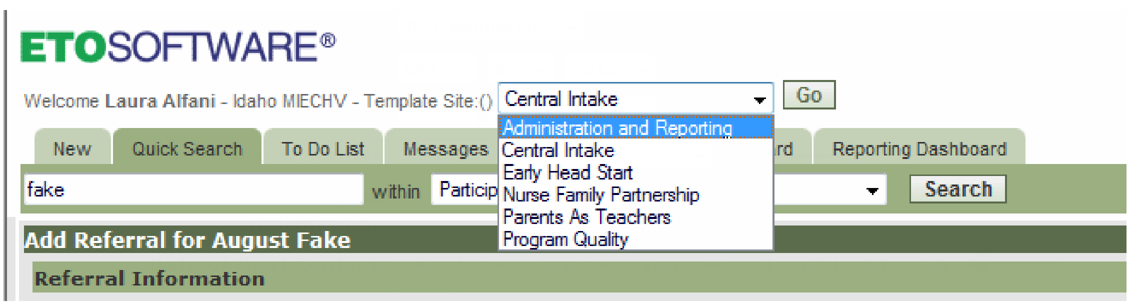


When dismissing a participant using the Dashboard Referral, make sure to complete each of the fields indicated with an arrow below. Importantly, once dismissed, the participants are not automatically enrolled into the assigned program (EHS, PAT, or NFP). Select the assigned Program from the drop box. Note that the only programs that appear are those where the Participant is not currently enrolled. Fill out all of the applicable fields (note that none of the fields are mandatory). If the Program receiving the Referral does not accept it by the Pending Drop Off Date, the Referral becomes null and will disappear from the pending list. You are also able to dismiss a Participant at the time of Referral from the Central Intake Program. Participants are placed on a waitlist called the “Pending Referrals List” that can be found for each respective program. Participants are not deleted from the ETO system, but moved from one program to another.

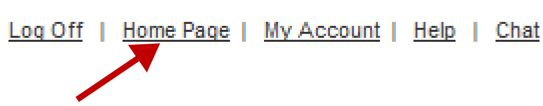


Enrolling a Participant into a Program (EHS, PAT, or NF) After Dismissal from Central Intake

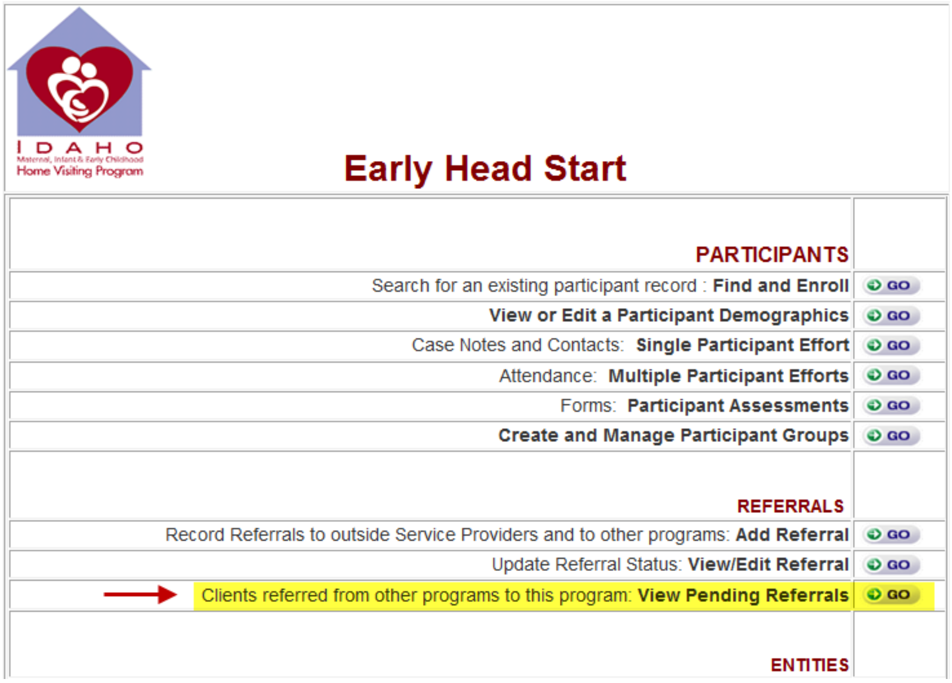
When the program (EHS, PAT, or NFP) is ready to enroll participants from their waiting list, users must ensure they are in the correct program. Use the drop down box to the right of the Template Site at the top of your screen to choose the appropriate program site. Once you are in the appropriate program (EHS, PAT, or NFP) you can easily enroll participants from the home page.



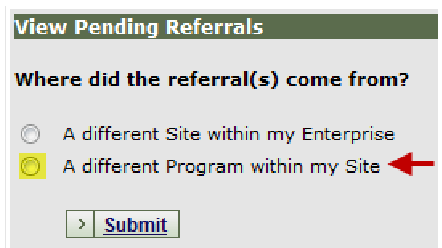
Home Page: Click on the “Home Page” link in the upper right hand corner of your page to take you to your program home page.



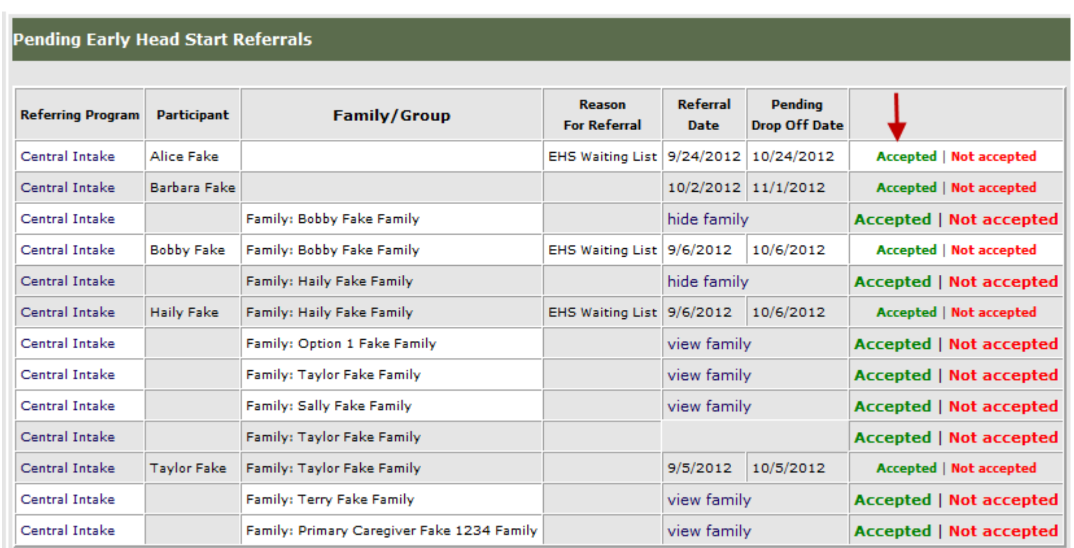
Select the “View Pending Referrals Link” by clicking the “Go” button to the right of this option. The “View Pending Referrals” screen will serve as a waiting list for each program type (EHS, PAT, or NFP).



Select “A different Program within my Site” and click “Submit.”



Enroll the individual or family into your program by selecting the “Accepted” option in green text. You can accept individuals or families. Once accepted, these participants are now enrolled in your program (EHS, PAT, or NFP) and removed from the waiting list. The referral status (pending, accepted, denied) will also appear on the participant’s dashboard in the Recent Referrals dashboard part.



Pending Early Head Start Referrals

Referring Program	Participant	Family/Group	Reason For Referral	Referral Date	Pending Drop Off Date	
Central Intake	Alice Fake		EHS Waiting List	9/24/2012	10/24/2012	Accepted | Not accepted
Central Intake	Barbara Fake			10/2/2012	11/1/2012	Accepted | Not accepted
Central Intake		Family: Bobby Fake Family		hide family		Accepted | Not accepted
Central Intake	Bobby Fake	Family: Bobby Fake Family	EHS Waiting List	9/6/2012	10/6/2012	Accepted | Not accepted
Central Intake		Family: Haily Fake Family		hide family		Accepted | Not accepted
Central Intake	Haily Fake	Family: Haily Fake Family	EHS Waiting List	9/6/2012	10/6/2012	Accepted | Not accepted
Central Intake		Family: Option 1 Fake Family		view family		Accepted | Not accepted
Central Intake		Family: Taylor Fake Family		view family		Accepted | Not accepted
Central Intake		Family: Sally Fake Family		view family		Accepted | Not accepted
Central Intake		Family: Taylor Fake Family				Accepted | Not accepted
Central Intake	Taylor Fake	Family: Taylor Fake Family		9/5/2012	10/5/2012	Accepted | Not accepted
Central Intake		Family: Terry Fake Family		view family		Accepted | Not accepted
Central Intake		Family: Primary Caregiver Fake 1234 Family		view family		Accepted | Not accepted

After accepting the referral, you will assign a start date to the participant when they will begin your program and click on "Add Participants to Program."

Navigation Bar: You can also view referrals sent to your Program from the Navigation Bar → View Pending Referrals → A different Program within my Site → Choose Accepted or Not Accepted. Leave the participants there if they should remain on a waiting list. To see the referral date (e.g. the date added to the waiting list), click on "View Family".

ETO Supervisor Instruction: To see a report showing the waiting list, go to Navigation Bar → Reports → View Standard Reports → Waiting List.

Assigning a Participant to a Home Visitor

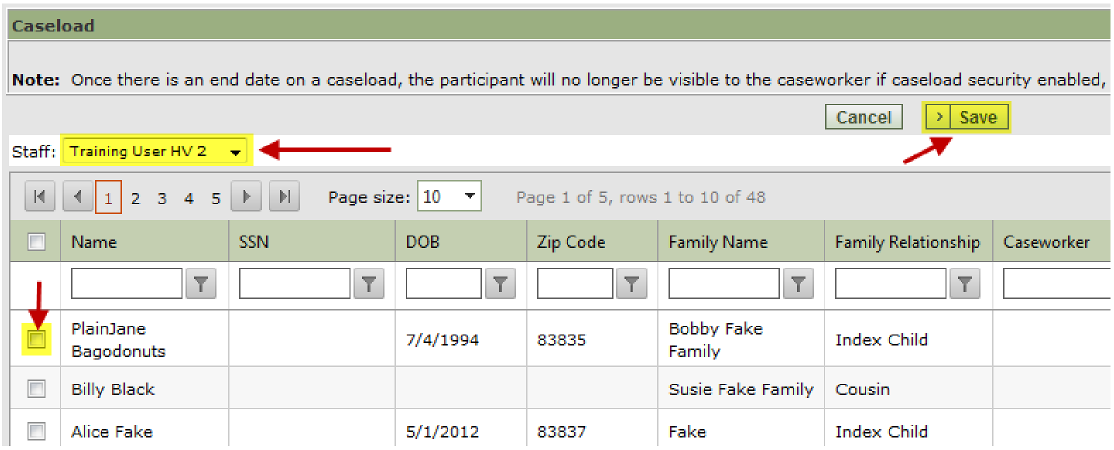
This is primarily a supervisor function

After participants are enrolled in a home visiting program (EHS, PAT, or NFP), supervisors must assign participants to a home visitor's caseload.

My Dashboard (Supervisors only): Supervisors will need to add a "Staff Caseloads" box to their My Dashboard page to be able to add participants to home visitor's caseloads. To do this: From My Dashboard, select Edit in the upper right → Add ETO Parts → Staff Caseload → Select the location and click Add. Now the Staff Caseload box will always appear on you're my Homepage page. The Staff Caseload part will only appear if your administrator has configured your account to be able to add participants to others' caseload. If you are unable to add the Staff Caseload box and you think you should be able to, contact the administrator (Laura Alfani, alfanil@dhw.idaho.gov) to gain permissions.

Once this ETO part has been added to the supervisor's My Dashboard, you can select the staff person's name in the Staff Caseloads dashboard or click Add to take you to the Caseload page.

Select the staff person's name in the Staff Caseloads dashboard part and add the Primary Caregiver and Target Child (and other members that have been enrolled) to the home visitor's caseload.



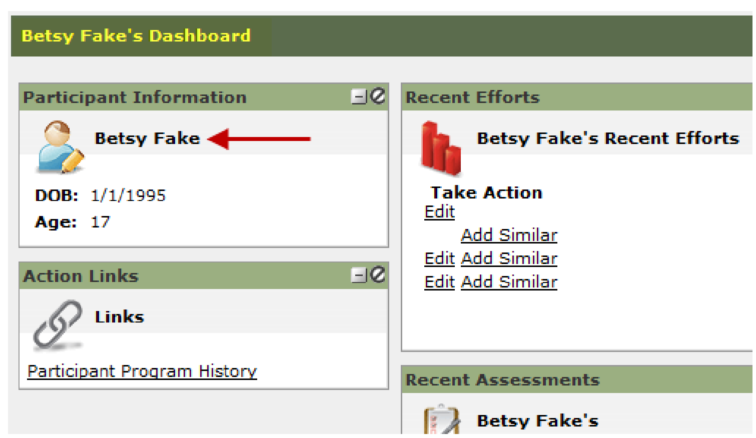
Viewing Your Caseload

This is primarily a home visitor or data entry staff function

My Dashboard (home visitors): If the My Caseload ETO part does not appear on your My Dashboard you can edit your Dashboard to include this feature. From My Dashboard, select Edit in the upper right → Add ETO Parts → My Caseload → Select the location and click Add. You can move the My Caseload part to your desired location on My Dashboard by clicking and dragging it to your preferred section of My Dashboard. Now the My Caseload box will always appear on you're my Homepage page. In My Caseload ETO part you will be able to see participants assigned to your caseload by your supervisor.

Home Visitors can use the caseload functionality to quickly see and work with the families they are assigned to. Depending on the settings chosen by the administrator, they may have cases assigned to them, or they may assign cases to themselves (or both). By clicking on the participant names in the My Caseload part you will be redirected to the Participant Dashboard. In the Participant Dashboard you can easily record and view efforts, assessments, referrals, and participant information.

→



Adding and Recording Assessments

This is primarily home visitor, data entry staff, and supervisor function

After participants are added into ETO, you can attach additional types of data to that Participant's record in ETO, such as Assessments. An assessment is ETO's term for forms that are used to collect data. Assessments can capture data about participants, families, entities, and staff. Assessments in the ETO system will mirror many of the forms, screens, or assessments you use in your program.

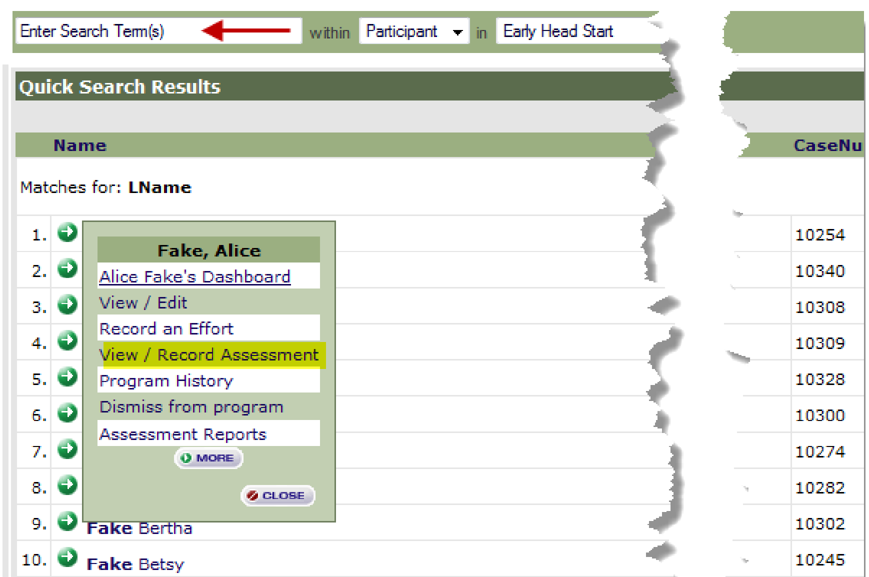
Once a participant is enrolled in a home visiting program (EHS, PAT, or NFP) home visitors and supervisors will begin providing services to the participant. As services are provided, home visitors and supervisors will document services (observations, activities, interactions, and more) using forms, reports, screening tools, all are forms are data collection. ETO assessments found in Participant Assessments section include, but are not limited to: Child Health Form, Maternal Health Form, Demographics Form, Edinburgh Postnatal Depression Scale, Everyday Stressors Index, Protective Factors Survey, Ages and Stage Questionnaires and more.

Home visitors, supervisors, and data entry staff are all responsible for ensuring the accuracy and reliability of the data collection. In ETO much of the information (data) that is documented throughout service delivery will be entered in "Assessments." You can enter a participant assessment a few different ways:

- Quick Search: Assessment link, by clicking the Participant's name in Quick Search results
- Navigation Bar: Participant Assessment features, below Participant History on the Navigation Bar
- Dashboards: Assessment link, from the Action Links or Assessment ETO Part on My and Participant Dashboards
- Home Page: Participant Assessment Link on program home page

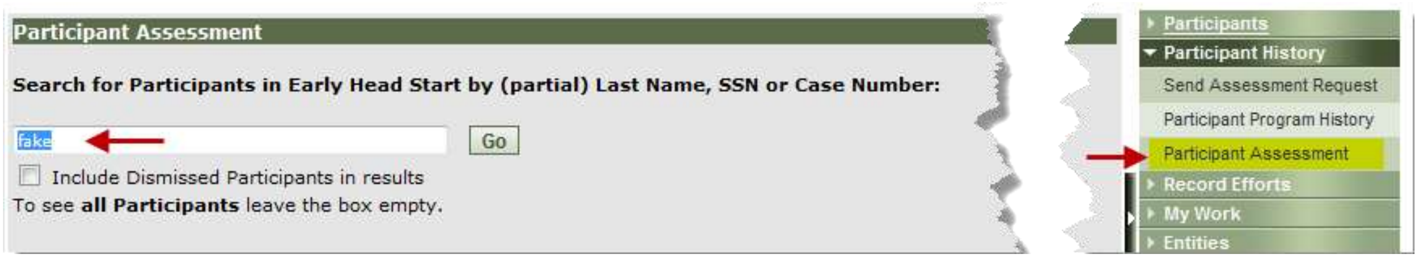
Quick Search

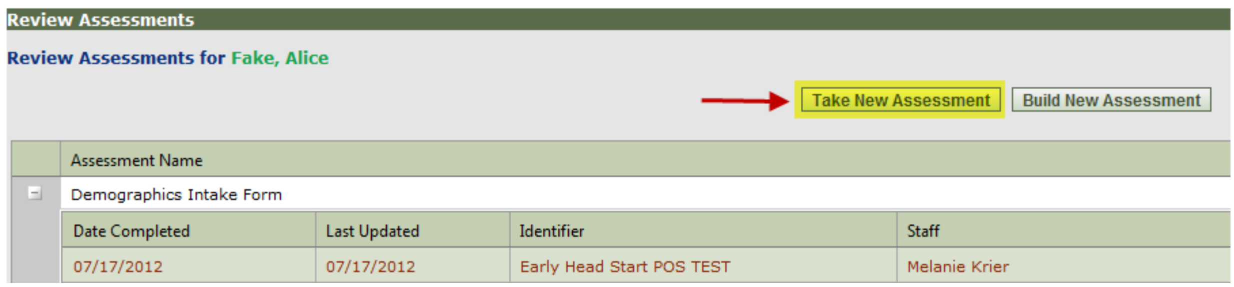
Type in the last name of the participant in the quick search box. When the search results appear, click on the name of the participant you would like to complete the assessment. After clicking their name, a box will appear with a number of options including "View/Record Assessment." Select "View/Record Assessment" to Take New Assessment.



Navigation Bar

Expand the Navigation Bar and click on the Participant History and then Participant Assessment. After clicking on Participant Assessment link a search box page will appear. Type in the Participant's last name in the search box and click Go. A list of participants will appear on the page. By clicking Go next to the Participant's name, the Review Assessments screen will appear, select take new assessment. Select the assessment in the drop-down menu you need to complete.

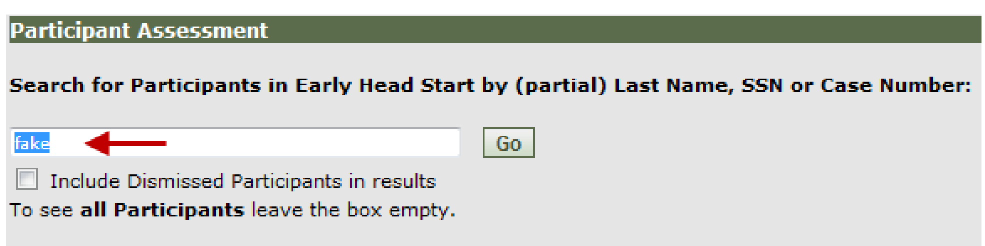




Dashboards

Click on My Dashboard from the quick tabs. Click New in the Recent Assessments in the ETO Parts to take a new assessment. A Search box will appear and then type in the last name of the participant and click Go. Select your participant by clicking Go. Then click on Take New Assessment to complete the assessment for your participant.

My Dashboard

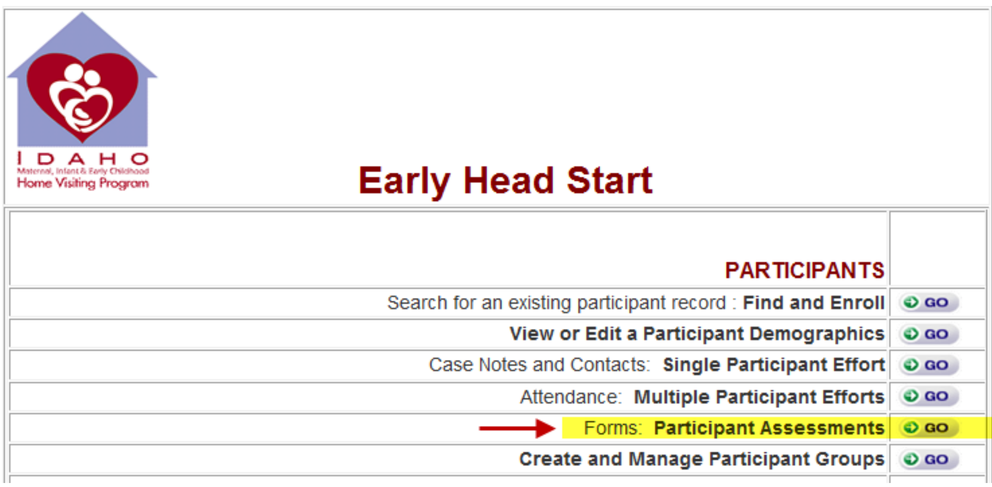


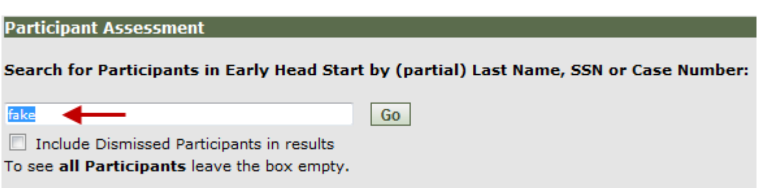
From My Dashboard, you can select the Participants name in your caseload box to arrive at their Participant Dashboard. From the Participant Dashboard, you can select "Add Similar" or "New" in the Recent Assessments part to add additional assessments for this Participant.

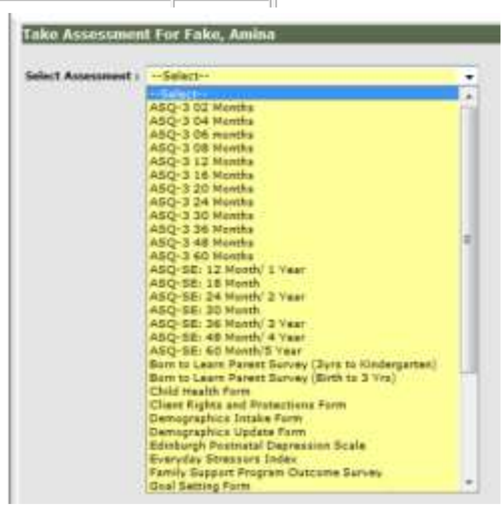
Participant Dashboard

Home Page

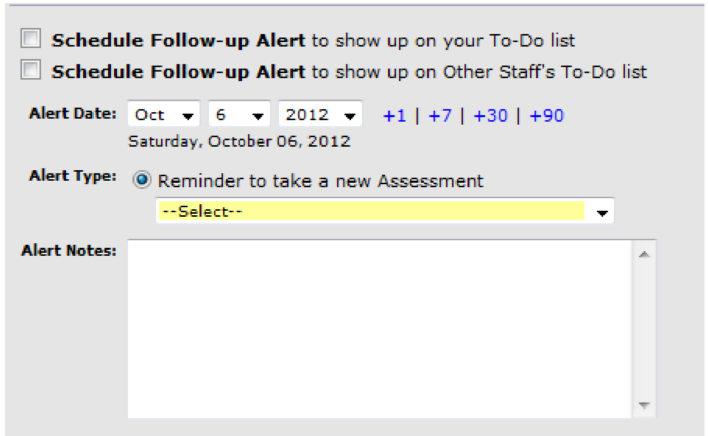
Click on Home Page from the quick tabs. Select the Go button for Forms: Participant Assessments. Search for your participant by typing in their last name and clicking Go. A list of participants with that last name will appear on a new page. Click the Go button next to your participant's last name and you will be taken to the Assessments Page. Select Take New Assessment and then select the assessment from a drop-down menu to complete the assessment.







Users can enter follow-up dates or reminders at the bottom of every assessment to remind them of when the next assessment for the participant will be due. For example, the home visits are to be scheduled every other week meaning there should be a completed Home Visit Encounter Form every other week. Users can schedule a follow-up alert that will appear on their To-Do list.



Printing Assessments

This will primarily be a home visitor or data entry function

Assessments can easily be printed from ETO by opening the Navigation Bar, clicking on the Reports link, the selecting Assessment Reports. When the Assessment Reports page opens, click on the Print Reports link and select which assessment you would like to print. A drop down menu with all of the assessments will appear, select your desired assessment and then print.

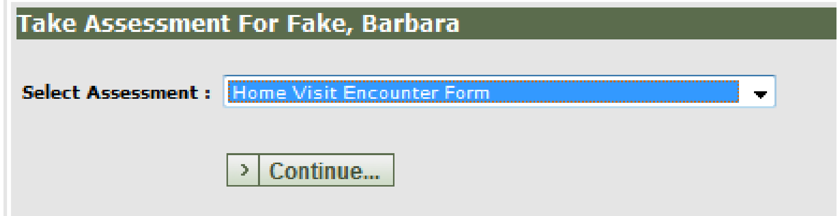
Documenting Home Visits

This will primarily be a home visitor or data entry function

ETO Participant Assessments will be used to capture most data collected at a home visit. For every home visit completed, there should be a Home Visit Encounter Form, which is found in the Participant Assessments. You may use any of the following four methods to find the Home Visit Encounter Form:

- Quick Search: Assessment link, by clicking the Participant's name in Quick Search results
- Navigation Bar: Participant Assessment features, below Participant History on the Navigation Bar
- Dashboards: Assessment link, from the Action Links or Assessment ETO Part on My and Participant Dashboards
- Home Page: Participant Assessment Link on program home page

(These methods are described in more detail in the Adding and Recording Assessments section) Once you are to a place where you can enter participant assessments, select Home Visit Encounter form and click continue.



Home Visit Encounter Forms should be associated with the Primary Caregiver's ETO record.

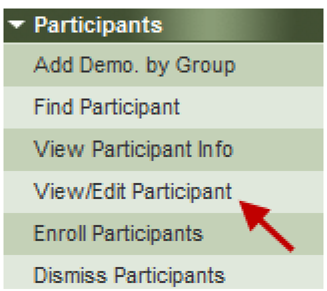
Editing Participant Information

This will primarily be the function of home visitors, data entry, or supervisors

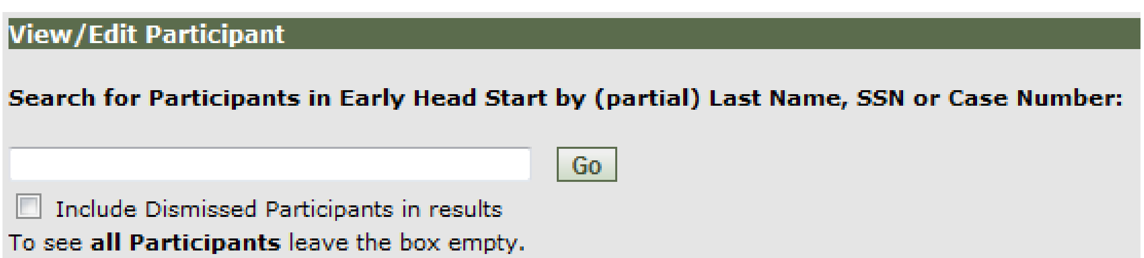
If you discover that there are mistakes in the demographic data entered for a participant (i.e. name spelled wrong, wrong birthdate, address, gender, etc.) or you need to fill in information that was left blank, you can update participant information. There are few different ways to do this:

View/Edit Participant

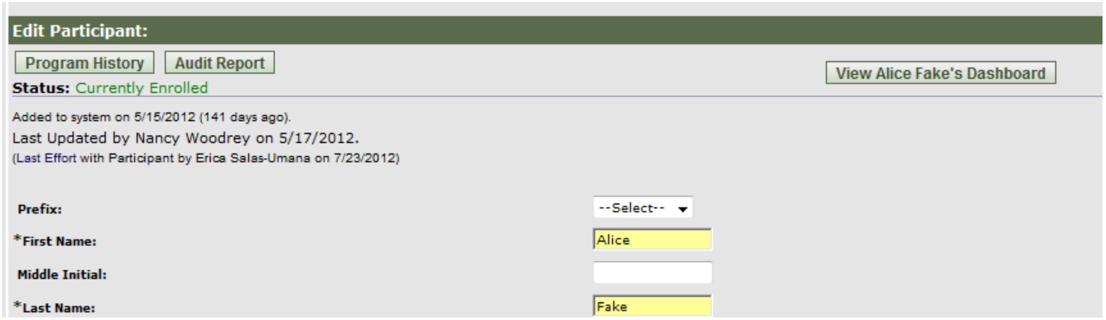
Below the Participants component on the Navigation bar, there is a View/Edit Participant button. Clicking this button will let you perform a program specific search of active participants. This will allow you to view participants in the system and edit their information as needed.



Clicking this link will take you to the View/Edit Participant page:

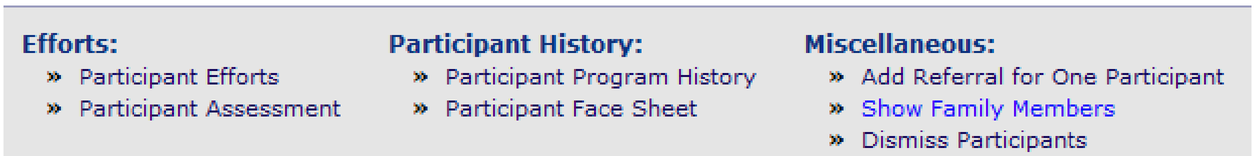


Enter the last name (or part of the last name, such as "Smi" for "Smith"), SSN, or case number and click the Go button. To include participants that have been dismissed, check the box below the search criteria box. To see all Participants leave the box empty and click the Go button. You can make changes to the demographic information as needed. Click the Submit button at the bottom of the page to save any changes made to the data.



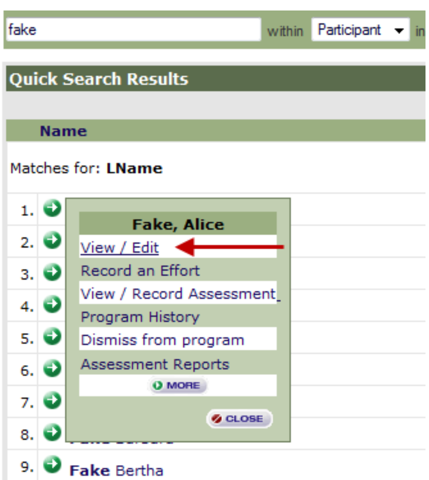
Clicking the **Program History** button in the upper left will let you see which Programs the Participant is in. Click **Audit Report** to see a record of any changes made to demographic data. Click the **Dashboard** button to access the Participant's Dashboard.

Follow the links at the bottom of the screen to enter or reference other types of data for the selected Participant.



Quick search

Type in the participant's last name, click search and then click on the participant's name. A pop-up box will appear with a view/edit link. Select this link to view/edit participant demographic information.



Home Page

Click on the home page tab in the quick tabs. Select the View or Edit Participant Demographics by clicking Go. This will navigate you to the search page. Type in the participant's last name in the search box and hit enter.

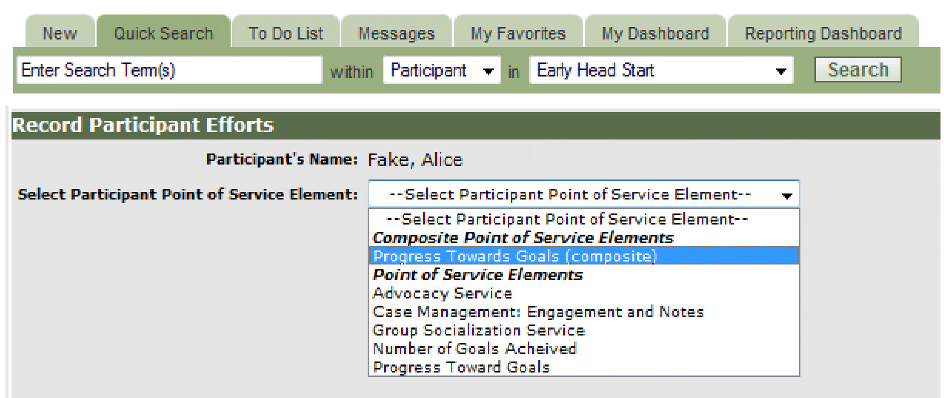
Recording Efforts (Points of Service)

This will primarily be the function of home visitors or data entry staff

Points of Service also called Efforts are used to track activities or time spent providing services. Entering data into Points of Services is referred to as Recording Efforts. Depending on the type of activity, Efforts may be entered on behalf of an individual Participant (such as a case management interaction or counseling session)or for a group of Participants(such as a class or support group). Date of Contact, Location/Method of Contact, and Notes are captured for all Efforts. Entering a Participant Effort can be done from several locations:

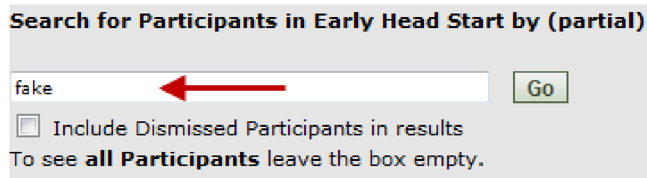
Quick Search: Search for the participant in Quick Search and click on their name, then click on the Record Effort link.

Navigation Bar: From the Navigation Bar, click the Record Efforts, then click Participant Efforts.



My Dashboard: From My Dashboard or Participant Dashboard, click on the Record Effort link in the Recent Efforts ETO Part on your Dashboard or in the Action Links.

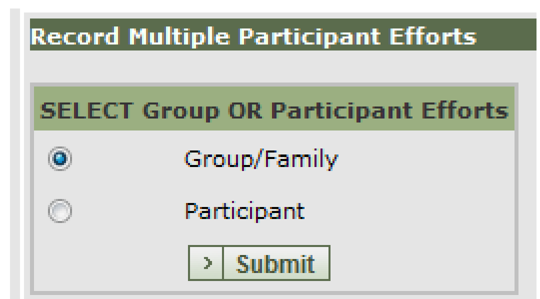
Home Page: Click the home page link at the top of your screen. Select the Go for the Single Participant Effort.



Recording Multiple Efforts (also Group Efforts)

Multiple Efforts (also Group Efforts) can be useful in tracking attendance, participation, or growth of a group. This function allows you to enter attendance or participation in an activity for multiple participants at once, instead of adding the same activity for each participant one by one. Some instances when multiple efforts are useful are group socializations or classes when a group of Participants come together on with some frequency. You will likely use this feature to record the effort called Group Socialization Service or Group Supervision/Team Meetings. Recording multiple efforts may be done from several locations:

Navigation Bar: On the Navigation Bar below Record Efforts, click the Multiple Participant Effort feature

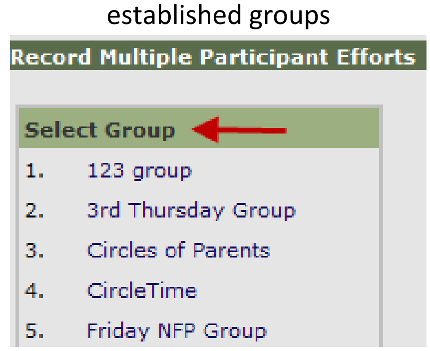


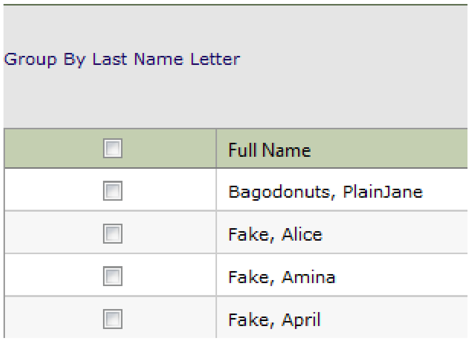
If select Participant

You will be redirected to a list of participants to add to the group

If select Group

You will be redirected to a list of already established groups





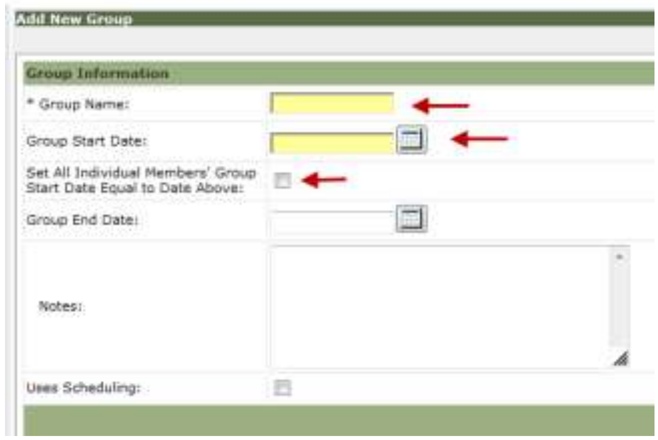
	Full Name
☐	Bagodonuts, PlainJane
☐	Fake, Alice
☐	Fake, Amina
☐	Fake, April

Home Page: Click on the home page link at the top of the screen. Select the Multiple Participant Efforts option by clicking Go. You will be directed to the Record Multiple Participant Efforts page as shown above to select participant or group/family.

Making a Group

Groups are like rosters of participants who meet with some regularity. Groups make it easy to enter attendance efforts. To form a group:

Navigation Bar: Click Participants on the Navigation bar and then select "Manage Groups." You will be redirected to the list of existing groups. If you need to create a new group, click the "New" link to create a Group Name and Group Start Date. It's typically best to check the box to "Set All Individual Members. .." If this box is not checked, each member's start date will default to the date they are added to the group. Click Save to save the new group. You will be redirected back to the Manage Groups page. To add members to your group, select the link under the "Active Members" column to select participants for the group.



Participants can be removed from the group and their start date in the group can be edited by clicking on the link in the Active Members column and edit link in the Take Action column, respectively.

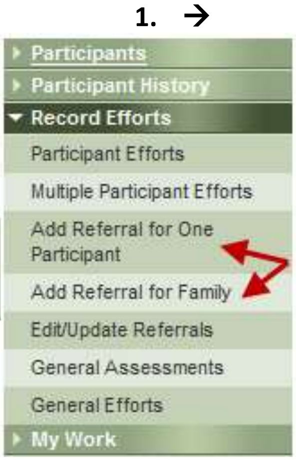
Recording Referrals

This will primarily be the function of home visitors or data entry staff

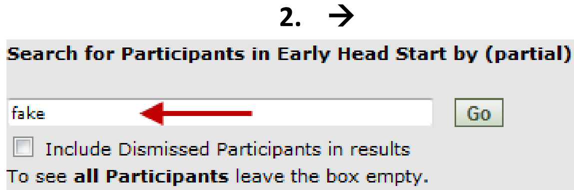
Throughout the participation in the home visiting program, participants will likely need referrals to any number of other service delivery organizations for additional supports and services such as WIC, child care, health care, food bank, or others. It is important to track these referrals, both formal and informal, in ETO. There are a couple different ways to document referrals in the ETO system. To refer a family to another organization or service you can use a number of options.

Navigation Bar: From the Navigation bar click Record Efforts, Add Referral for One Participant or Add Referral for Family and then search for the participant when redirected to the participant search page. Most often you will add a referral for One Participant. Click on the Participant name. Select Entity (Service Providers) and then click the Submit button.

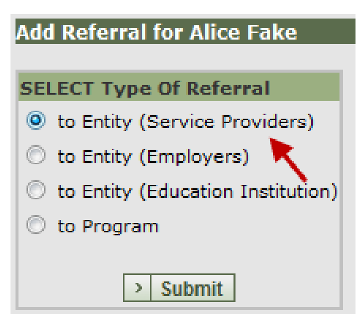
1. →



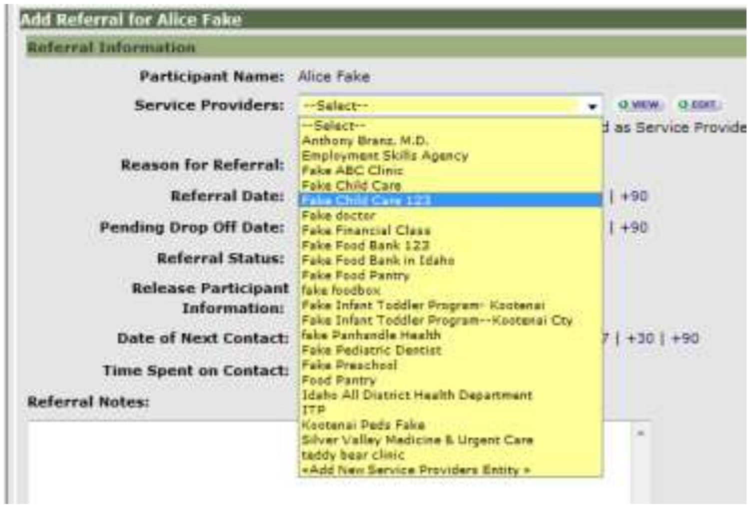
2. →



3.

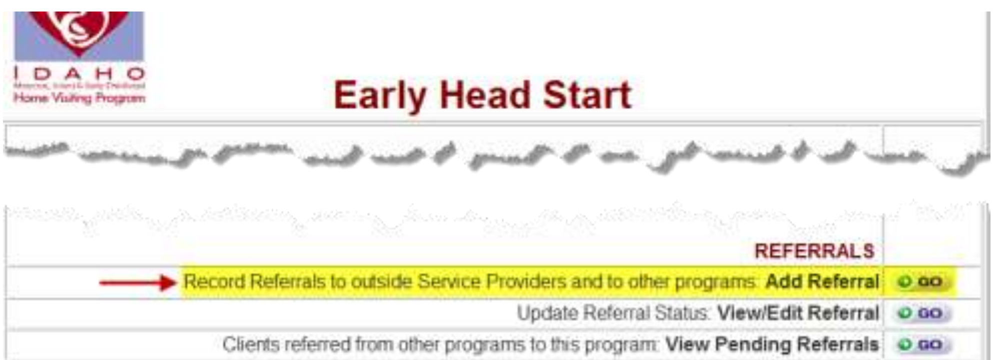


Record the Referral by selecting a Service Provider, Reason for Referral, Date for Referral, Pending Drop Off Date, Referral Status, time spent and then click the work submit.



My Dashboard: From My Dashboard select the New link in the Recent Referrals ETO Part on the My Dashboard. Follow steps shown above to Search for Participants and add a Referral to a Service Provider.

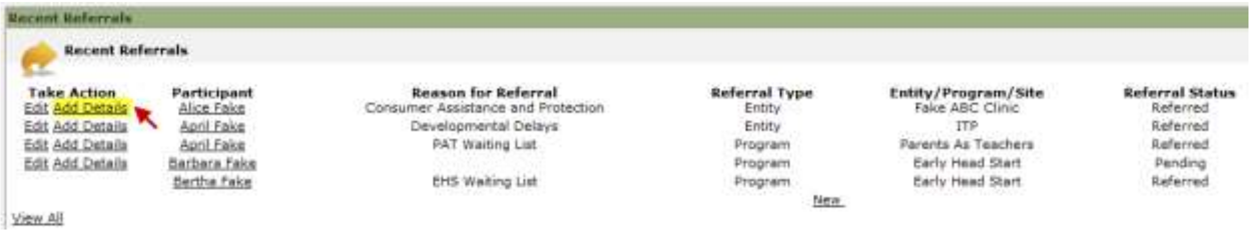
Home Page: From the Home Page, you will select the Add Referral option by clicking the Go button. After clicking this button you will be redirected to search for the participant you would like to refer to a service provider. Follow steps shown above to Search for Participants and add a Referral to a Service Provider.



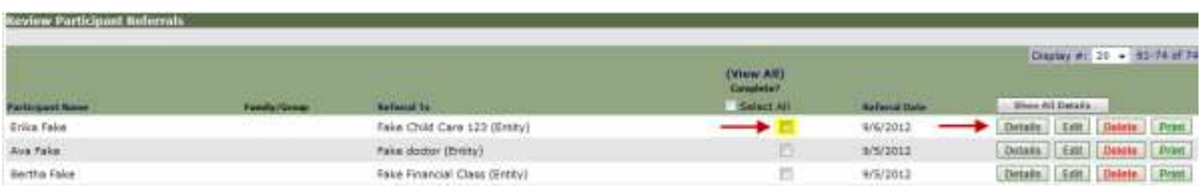
Tracking referrals

It is important to follow-up on referrals to determine if the family's referral has been completed or if it is still pending and then document the outcome of the referral. There a number of ways you can track referrals.

My Dashboard: In the recent referrals box under the Take Action Column, you can select Add Details



Navigation Bar: Expand the Navigation Bar and select the Record Efforts and then click on Edit/Update Referrals. You will be redirected to select a search type. Select the appropriate search to meet your need. You will then be redirected to a page with a list of pending referrals. To review the details of the referral, click the Details button. To edit the details of the referral, click the Edit button. To indicate the referral has been completed, select the check-box and hit complete. Supervisors and home visitors can run reports of pending referrals for participants to determine the status of the referrals.



Dismissing Participants

This will primarily be the function of supervisors or home visitors

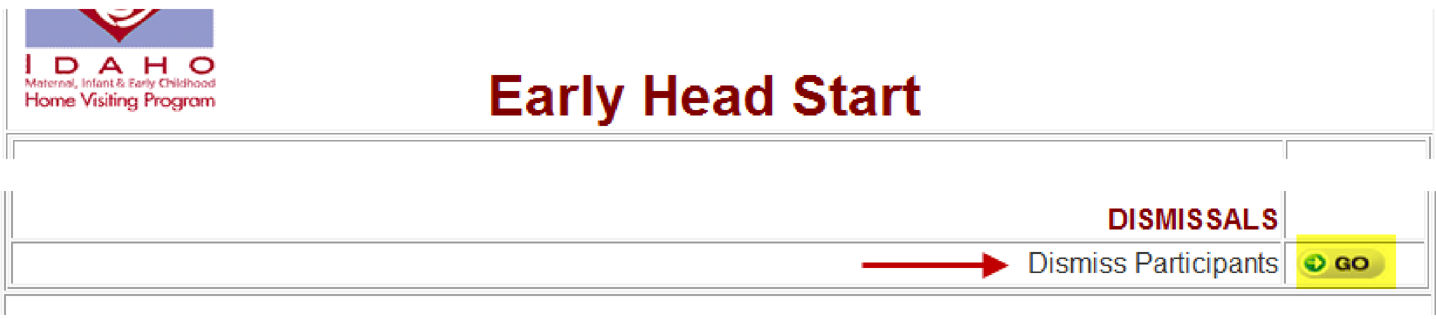
Dismissals in ETO mean that a record is being made “inactive” or closing a record. If a participant returns for services, that record can be retrieved and re-activated with a new enrollment date. Participants should be dismissed from a Program (EHS, PAT, or NFP) when the participant is no longer receiving services. The participant will not be deleted from ETO, but will no longer be viewable in your caseload once dismissed.

Dismissing from Program

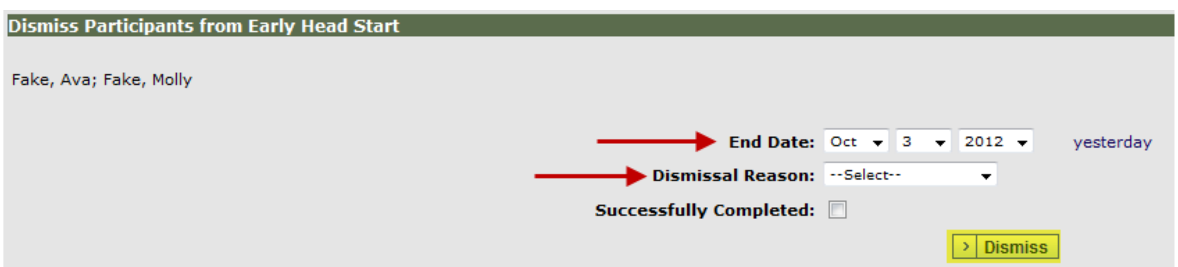
Participants must be “dismissed” from a program when they are no longer receiving services or enrolled in your program. Participants can be dismissed from the Navigation Bar or from the Home Page.

Navigation Bar: From the Navigation Bar → Participants → Dismiss Participants → Search by name or family name (depending on which of the household participants are “active” in the program) → Select participants to Dismiss and set a Dismissal Date and Reason for Dismissal

Home Page:



From the Navigation Bar or the Home Page, you will be redirected to a search page. Search by the participant or family last name in and select Search. Select the participant or family you would like to dismiss from your program and click on the “Dismiss (Same Date +Reason)” button on the bottom of the page. You must select the date and dismissal reason and then click the “Dismiss” button.

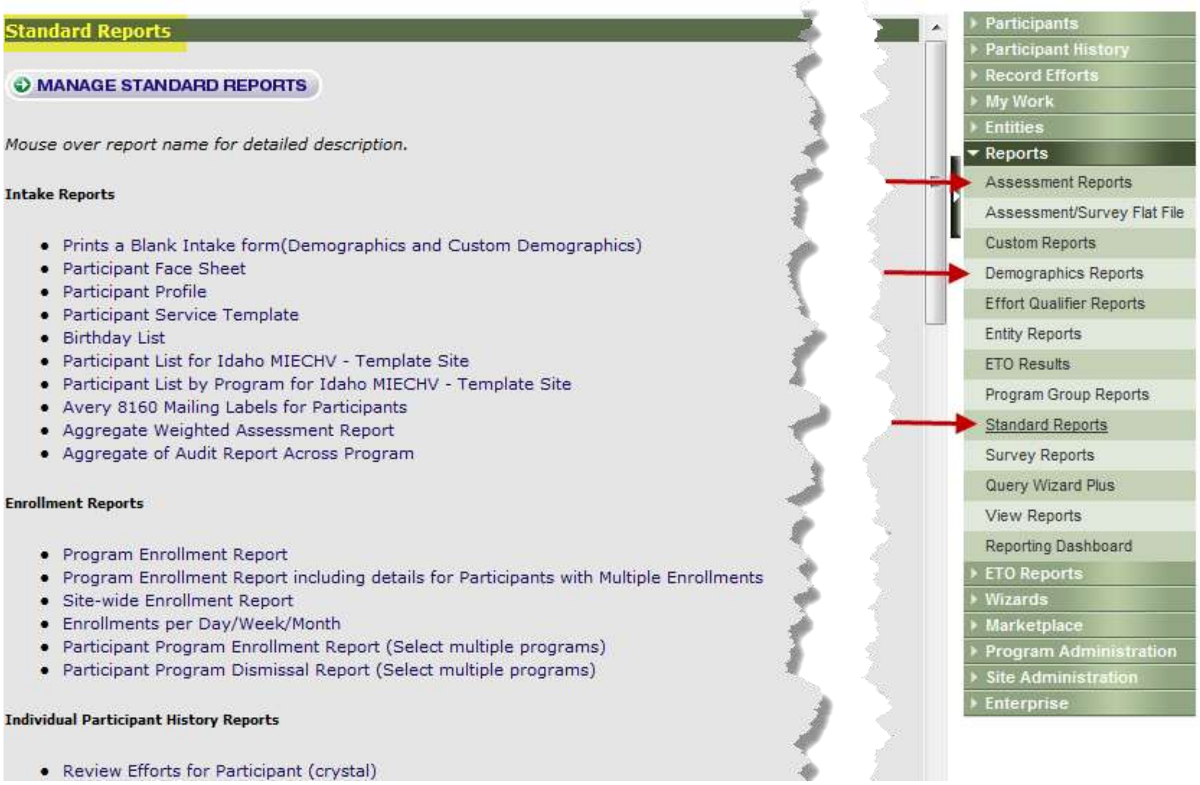


Running Standard Reports

This will primarily be a supervisor function, but all users can access and run reports in ETO

There are many standard reports already configured into ETO. Users also have the ability to generate new reports or request specific reports from the Enterprise Administrator. When requesting a report from the Enterprise Administrator, send an e-mail with detailed description of the report you would like generated and a timeframe for which you would like the report completed. In the subject line of the e-mail include ETO Reports Inquiry.

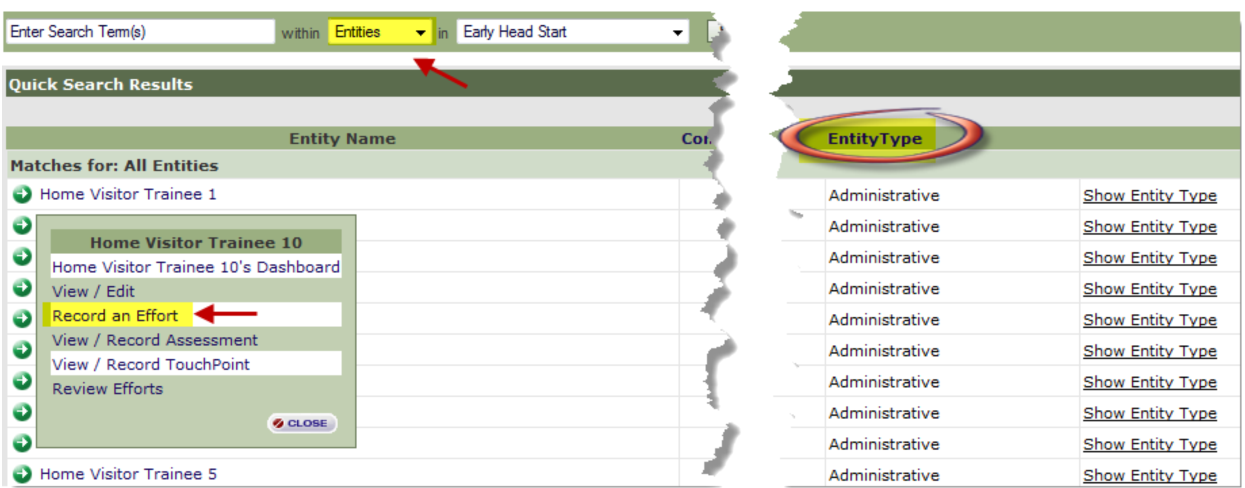
From the standard reports section, you can run many different reports in ETO. From the Navigation Bar, select the Reports link to view the available report selections. The Demographics Reports, Assessment Reports, and Standard Reports will be the most useful for supervisors and home visitors as users become accustomed to the ETO system.

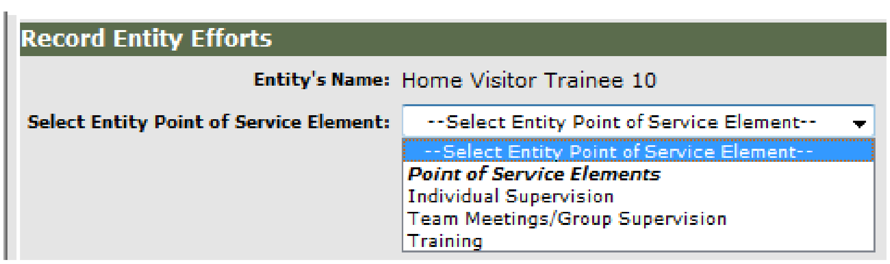


Recording Supervision, Training, and Meetings

Your organization will determine if this is a supervisor, home visitor, or data entry staff function

From the Program Quality ETO Program, Quick Search within Entities for a Home Visitor → Record Effort → Choose Individual Supervision, Training, Group Supervision





Recording Performance and Evaluation Data

This will be primarily a function of home visitors, data entry staff, and supervisors

There is a Program in ETO called Program Quality. Program Quality will be used to record and track performance and evaluation data. Supervisors and Home Visitors have access to the Program Quality program to enter in Entity Assessments (assessments or surveys completed by staff related to staff performance). These assessments include at least the Time Use Survey and Home Visit Rating Scales Survey. There may be additional assessments that are configured into this system at a later date.

These assessments can be most easily found from the Home Page. Click on the Go button next to the Entity Assessments. Type in your last name (or the last name of the staff you are recording data on behalf of) in the Search Box. Click Search and select your name (or the name of the staff you are recording data on behalf of) and then select Take New Assessment and choose the appropriate assessment. Complete the assessment and hit Submit.

Glossary

Active: This is a term used to define a participant's status in a program. An "active" participant within a date range is someone who has a program start date before or within the selected date range and either no end date in the program OR an end date between the date range selected. For example, if the date range is January through December of one year, and a participant was enrolled in December of the previous year but not dismissed until the middle of the year when you are running the report , they were still "active" at some point during the date range.

Assessments: A data collection tool. In other words, an assessment is ETO's term for forms that are used to collect data. Assessments can capture data about participants, families, entities, general, and staff. Assessments in the ETO system will mirror many of the forms you use in your program.

Attribute: Characteristics of Entities that are not expected to change as a result of service. Attributes are to Entities what Demographics are to Participants. Attributes appear on the Add New Entity and View/Edit Entity screens.

Boolean: Refers to any Yes/No field in ETO Software, including: Demographics, Assessment Elements, Points of Service, and Attributes. The term Boolean is seen on several screens throughout the software, but especially in the Query Wizard.

Central Intake: Central intake in ETO is a program that will act as point in which multiple agencies can enter application information to facilitate identification of which program the participant will be enrolled in or assigned a waiting list.

Demographic: Characteristics of Participants that are not expected to change as a result of service. Demographics appear on the Add New Participant, Add New Household, and View/Edit Participant screens, among others. Entering Demographics is considered the most basic function for a staff using ETO. Additional data cannot be entered about a Participant unless the Standard Demographic fields for first and last name have been entered.

Efforts: Also known as Points of Service (POS), efforts refer to services and activities between staff, clients, and third party partners (volunteers, mentors, etc.). You can think of efforts as actions. Participants, Entities, or Programs can have efforts. Examples of efforts may be participation in a home visit or a referral to another organization.

Enroll: To bring a participant that exists in ETO into the selected program, and enter a program start date.

Entities: Are third party agencies or organizations that impact the lives of your participants (such as other social services agencies, community organizations, employers, schools, etc.) with whom you work to provide services to clients. These are places to which programs make referrals or employment placements, from which you receive referrals, to which you provide vouchers for services, etc. Entity records in the ETO system are typically used like a rolodex, to capture basic contact information. Importantly, entity records are also used to track staff, volunteer, and mentors records.

ETO: Stands for "Efforts to Outcomes" and is the data collection software used by the Idaho MIECHV program. The ETO system keeps tracks of the efforts your organization makes (home visits, referrals, information provided to a family) and also measures the outcomes reached by the families you serve (Improved health, parenting skills, financial stability, etc.).

Family: Participants that are in some way related or share a home; families are recognized as a unit of linked participants. Family functionality allows for the number of families served to be captured in addition to the number of individuals. The term family is synonymous with the term household in ETO.

Group: A subset of Participants who receive services simultaneously. Groups can be established and modified based on expected attendance.

Group Effort: Group efforts are group socializations or classes that will occur on some frequency. Groups can be made and edited to track attendance and progress in group socializations or classes for participants. Group efforts can all be recorded to track team meeting or group supervision.

Household: Participants that are in some way related or share a home; households are recognized as a unit of linked participants. Household functionality allows for the number of families served to be captured in addition to the number of individuals. The term family is synonymous with the term household in ETO.

Log Off: The link in the upper right corner of the screen that all users should click before closing their browser to ensure the data remains as secure as possible.

Outcome: The "O" in ETO (Efforts to Outcomes). Outcomes can be tracked in Point of Service elements that are built to measure and increase or decrease in attitude, performance, knowledge, etc.

Participants: members of the target population. May be the primary caregiver, target child(ren), or other family members.

Points of Service (POS): Also known as efforts, Points of Service (POS) refer to services and activities between staff, clients, and third party partners (volunteers, mentors, etc.). You can think of a point of service as an action. This is where time and energy spent is tracked within ETO. Participants, Entities, or Programs can have POS. Examples of POS may be participation in a home visit or a referral to another organization.

Referral: To "push" a participant to another program within ETO (versus Enroll, which is a pull), or to an Entity Employer, Education Institution, or Service Provider.

Review Participant Efforts: The most popular report in ETO! It contains detailed data about a selected participant within a date range, including efforts, employment, referrals, assessments, etc. The original view shows summary statistics, there is the option to drill down to see more details, such as case notes.

Standard Report: A "canned" report that came with ETO. While there is a feature on the Navigation Bar named Standard Reports, the Demographic Reports, ETO Reports, Assessment Reports, etc., are also considered Standard.

Survey: Like an assessment, but anonymous.