



**ETO Software™  
Site Administrator Manual  
Fourth Quarter 2004**

**Overview**

Welcome to ETO Software™, a user-friendly, customizable program management tool for human service organizations. ETO Software™ allows you to capture, record, and receive reports about the hard work you do every day. Because ETO Software™ is web-based, it is available to authorized users from any Internet-connected personal computer.

ETO Software™ is a flexible tool that can be customized by authorized users to meet the changing needs of your organization and your constituents. ETO Software™ gives an Organization the ability to identify and monitor any outcome for any of its programs and strategic initiatives. As soon as outcomes are established for each program, staff can show their work towards achieving these outcomes by recording their efforts on a regular basis. ETO Software™ reports demonstrate how well you and your organization are doing in moving towards or achieving program outcomes.

**Implementation, Training, and Customer Support**

Social Solutions prides itself on its implementation, training, and customer support. Collectively, our partners have over 20 years experience in delivering and managing human services. We bring that experience to our delivery and support of ETO™ Software. At the conclusion of implementation and training, Social Solutions expert support staff is available Monday – Thursday between the hours of 8 am and 8 pm EST and Friday 8 am to 6 pm EST to answer your questions and help you take full advantage of this powerful new tool. Ideally, questions should come through the organization's Site Administrator, but we welcome calls from any users.

**Implementation and User support:**

410.732.3560 Office  
866.732.3560 Toll Free  
[support@socialsolutionsonline.com](mailto:support@socialsolutionsonline.com)



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### **Getting Started**

Social Solutions' ETO Software™ is a web-based application that can be accessed from any Internet-connected personal computer. The minimum technical requirements are:

- Internet Explorer 5.5 or greater (IE 6.0 is recommended)
- Pentium/Celeron class Processor (350 MHz or greater recommended)
- Internet Connection (Broadband is recommended)
- Windows 95b/98, NT4, ME, 2000, or XP (ME, 2000, and XP recommended)

### **Confirm Browser**

In order for your site to be fully operable, you will need to use the Internet Explorer browser. If you have Internet Explorer (IE) already available on your computer, you will need to confirm that it is *Version 5.5 or newer*. You can do this by typing in your domain name (e.g. [www.etosoftware.com](http://www.etosoftware.com), .net or .org) or your ETO Software™ Enterprise Edition web address, and clicking GO (or hit enter) This will take you to the ETO Software™ homepage. If you do not have IE 5.5 or above, you will see a link to download Microsoft IE version 6.0. Depending on the speed of your Internet connection, this may take anywhere from 5 to 75 minutes. *Please note: Windows will need to shut down and restart when the download is complete, so be sure that you have saved and closed any applications that are open.*

### **AOL Users**

Please note: if you gain access to the Internet using America Online and a modem connection, you will need to minimize the AOL interface and double click on the Internet Explorer icon on your desktop in order to properly access ETO Software™. Once the Internet Explorer browser comes up, enter your domain name in the address bar and hit enter or Go.

### **Internet Toolbars**

If you use an internet toolbar such as the Yahoo! Companion, Google Search Bar, etc., verify the feature that refers to "Highlighting the fields that AutoFill can fill" is turned off. This feature interferes with your ability to distinguish between "required" fields and "non-required" fields.

### **Home Page**

Once you type and retrieve your domain, you will arrive at the homepage for your ETO Software™. You will be prompted to enter your **User Name**, **Password**, and in some cases **Site**. Your **User Name** is issued to your Site or Enterprise Administrator and is not case-sensitive (e.g., jdoe). Your **Password** is assigned by your Site Administrator and should immediately be changed by all users after logging in to the software. Your **Site** (your organization's name) will be in the **Site** Select box on the home page (if applicable). Once you type in your **User Name** and select your **Site**, they will become your computer's defaults on the homepage (meaning you won't have to type them again).



### **Security: Authorized Access**

- ETO Software™ is secured against unauthorized use by VeriSign® 128-bit Security Encryption, the industry standard in Internet site protection.
- In order to gain authorized access, you must have a User Account in the ETO Software™ system. User Accounts are created by Social Solutions and customized for each user by your Site Administrator.
- After entering your *User Name*, *Password* and *Site*, you may be presented with *Auto Recall* and *Security Confirmation* Screens. We do not recommend using the *Auto Recall* feature (which saves your password), as this might allow someone to gain unauthorized access to the Software on your computer. Also, if a *Secure Network* announcement arrives, please confirm that you do wish to continue.
- A small gold lock icon will appear in the lower right corner of your screen. This confirms your presence on a secured site.
- **There is a security feature built into ETO Software™ that shuts down your session if you have not interacted with the database in 60 minutes. When there are five minutes remaining before you time out, a message box pops up to alert you.**

### **Back-up**

ETO Software™ is backed up three times a day.

- Back-up 1: SQL 2000 internal back-up;
- Back-up 2: Veritas® Server back-up;
- Back-up 3: Tape drive back up; tapes are transported to a secure off-site location.

### **Navigation**

- Once you gain access to ETO Software™, you will see a blank screen, except for the elements that are fixed at the left, center and right of the top of the screen.
- The Social Solutions logo will permanently occupy the upper left part of your screen.
- Your personal access information will permanently reside in the upper right hand corner of the user-interface. Please notice that in addition to your name and date, the *Log Off* option is here. This is the recommended manner of departure from the software.
- The *Home* link will bring you back to the opening screen. This is useful if your site administrator has used the custom home page to give you tips on using the software.
- You will note that you also have the ability to easily change your password by clicking on *Change Password*.
- If a message has been sent to you, you will also find a *Read New Message* alert in the upper right of your screen. Users can click on this alert or use the Navigation access (described later in this manual) to retrieve messages.
- There is also a *Help* feature in the upper right corner of the screen. This link provides access to a PDF (Adobe Acrobat) version of the User Manual. If you do not have Acrobat Reader, there is a link on the ETO Software™ Supplemental Resources CD to download the program.



### **Access to Program Information**

- Once you have accessed your Software, you must select a Program from the drop-down box in the upper middle part of your screen. If you do not see the name of the Program that you expected, please speak with your Site Administrator, who has the ability to adjust your account accordingly.
- If you work in more than one Program, you will find that you can easily shift between Programs by clicking on them in the *Select Program* box.
- Once you select a Program, the *Navigation Bar* will appear on the left side of your screen as a series of gray boxes. The *Navigation Bar* is customized to your user-role ("Staff", "Program Manager", "Site Administrator", etc.) assigned by the Site Administrator.
- Each Navigation Element has a menu of choices that appear when it is selected. These menu choices are customized to your organization's needs and a user's role as assigned by the Site Administrator. All menu choices are fully defined in this manual, with the user-role availability noted.



## Navigation Component: Participant

Description: This Navigation element is focused on adding, enrolling, and dismissing a Participant in your Program, including the demographics associated with that Participant.

### Duplicated Participants

(Site Administrator)

- This feature will generate a list of all duplicate participant records across your site allow you to merge them from the same screen.

### Add Demo. By Group

(All Staff)

- This feature allows you to update the same demographic for multiple participants at the same time.
- You will see a list of all standard demographics and site-specific and program specific custom demographics available to your program.
- When you select the demographic that you would like to update, you will be given the choice of updating a group or selecting from a list of participants. If you select Group, you can choose from all groups, families or housing units that are associated with your program. If you select Participant, you will be able to check the desired participants from a list of those in your program (similar to the list seen when you are enrolling or dismissing, or recording multiple participant efforts).
- After selecting your participants or group of participants, the next screen will list each participant with the chosen demographic field next to their name. If the demographic has already been filled out for a participant, the current information will be shown. If you would like all of the participants' information to be the same, you can change the first demographic on the list and then click the "Make the Same" button.
- After entering your changes to each demographic, save your changes by clicking Submit at the bottom of the list.

### Find Participant

(All Staff)

- This functionality allows you find any Participant in your site, whether "Currently Enrolled" or "Currently Dismissed" in your program.
- Use the "Search" functionality to find your Participant by typing in at least a partial last name, last name (space) first name, or a full SSN or Case Number.
- One or more Participant matches will appear showing Name, DOB, SSN, Case Number, and whether the Participant is "Currently Enrolled" or "Currently Dismissed" in program you are working in.
- Click on Print List (top of list) to print the list as you see it.



- Click on the Participant's name (in blue) to access their read-only demographics record. You will notice at the top of the selected participant's demographic page, the last staff person to update the participant's record, including a time/date stamp.
- Click on the Participant's "Program History" link (in blue) to access a full record of Program Enrollments, Start Dates, Termination Dates, Graduation Status, and Termination Reasons.
- The Site Administrator can edit or delete the dismissed Participants Program History record if necessary.

### **Find Participant (C)**

(All Staff – Optional Feature)

This feature operates similar to Find Participant with the following exceptions:

- If a participant is currently enrolled or has ever been enrolled in a confidential program to which the staff person does not have access, that participant's name will not appear in the search results.
- If the participant(s) have never been enrolled or have been previously enrolled in a confidential program to which the staff person has access, the participant(s') first and last names, and case number (if applicable) will appear in the search results.
- Confidential features will not display the participants' SSN, DOB, or any other sensitive data in the search results.

### **View Participant Info**

(All Staff)

- This functionality allows you to find any Participant who's ever been in the Program in which you're currently working.
- Use the "Search" functionality to find your Participant by typing in at least a partial last name or a full SSN or Case Number (leaving the box blank will pull up all currently enrolled Participants).
- One or more Participant matches will appear, showing Name, DOB, SSN, and Case Number.
- Click Print List (top of list) to print list as you see it.
- Click on "Work with Participant" to access a Participant's read-only demographics record.



- Click on the Participant's "Program History" link (in blue) to access a full record of Program Enrollments, Start Dates, Termination Dates, Graduation Status, and Termination Reasons.

## Add New Participant

(All Staff)

- This is the primary interface for capturing standard demographic and contact information for new Participants in your organization's services.
- Demographic Elements:
  - The Site Administrator defines which fields are "required" when adding a new Participant (when a field is "required", the user will not be able to submit the record without completing the required information). Required fields appear in yellow on the interface.
  - "Case Number" may be used to capture any alphanumeric (letters and/or numbers) code that your organization uses to track participants. This may be used instead of or in addition to the Social Security number, and also can be used to "search" for a Participant in the Software. If a user does not provide a case number, ETO Software™ will automatically generate a number.
  - The Site Administrator can customize the "Referral Source" and "Funding Source" drop-down fields as necessary (see *Entities* functionality below).
  - The Site Administrator can create "Custom Demographics" that will appear at the bottom of both the *Add Participant* and *Edit Participant* screens. "Custom Demographics" may apply to all participants across the organization or may apply to a particular Program enrollment.

### Adding a New Participant

- Step One:
  - Once you've completed all relevant information on the first page, click "Submit New Participant Information" at the bottom of the page. If you submit the new Participant's name and it matches another Participant in the Software, you will get a "Potential Participant Duplication" alert. This alert gives you "Name", "DOB", and "SSN" so you can determine whether the participant is a duplicate or not. The Software asks "Do you want to add a DIFFERENT participant with this name to the system?" and you can click "Yes" or "No" as appropriate. Some staff may also receive a message asking them to contact their System Administrator. This may happen if the participant is already enrolled in a confidential program. The Site Administrator can then enroll them in the correct program and alert the staff.
  - If participant records are duplicated, the two records can be merged by the Site Administrator with the *Merge Duplicates* functionality described below. Duplicate records can be discovered through the *Duplicate Participants* feature.



- Step Two:
  - Once a new Participant's information has been submitted, the Software will prompt you to determine if you wish to enroll that Participant in your current active program (as determined by the Select Box at the top of your screen).
  - If you click "Yes", the next screen will allow you to use a date picker to choose the new Participant's program "Start Date" and "Projected Termination Date" (if applicable). Once you have chosen these, click "Add Participants to Program".
  
- Step Three:
  - Once you enroll a Participant, a box will appear with the following text – "Participant has been successfully added to "Program Name". Do you want to complete an Assessment for this Participant?" This functionality exists so you can immediately complete an "Intake Assessment" for a Participant.
  - Click "Yes" to complete an Assessment, and then "Take New Assessment". Click "No" if you aren't using an Assessment or if you don't wish to fill one out for the Participant at this time. Please see "Assessments" later in this manual.

## View/Edit Participant

(All Staff)

- You have the ability to edit the demographic and contact information for any Participant. Once you have identified the Participant whose information you want to edit (by searching by last name, last and first name, SSN, or Case Number), click on his/her name or "Work with this Participant" (both in blue on your screen). Editing the record will over-write the current record. The Software will show you the last person who updated each client's record and when that update took place.
  
- At the top of the page, you can review the Participant's "Program History" by clicking on the blue link. If information contained therein is incorrect, the Site Administrator can edit the history.
  
- This feature also includes "Quick Links" located at the bottom of the page. These links include:
  - Efforts:
    - *Record New Effort*: Facilitates recording a new participant effort.
    - *Review Participant Efforts*: Review efforts for the selected participant for a specified date range.
    - *Participant Assessments*: Work with assessments for this participant. Update an assessment, take a new assessment, or view assessment reports.
  - Participant History:
    - *Program History*: Review Participant's Program History.



- *Participant Face Sheet:* A Crystal Report® of all Demographic data for the participant.
- *Employment History:* Link to participant's employment record.
- Miscellaneous:
  - *Track Participant Processes:* Link to track Participant Processes. It will also allow you to start a new process for this participant.
  - *Review Reliable Contacts:* Link to Reliable Contacts' contact information.
  - *Add Reliable Contacts:* Facilitates the addition of Reliable contacts such as Parents, Siblings, Clergy, etc.
  - *Add Referral:* Allows you to add a Participant Referral.
  - *View/Edit Referral:* View or Edit a referral for this participant.
  - *Show Family Members:* Shows all family members linked to this participant. Also shows their DOB and relationship to the participant.

## Enroll Participants

(All Staff)

- Using this function, you can add Participants who have been entered into the Software but are not yet enrolled or assigned to your particular program. This is the same functionality you will see when you Add New Participant and then "Auto Enroll" them. The search function allows you to search for a Participant by "Last Name", "First Name", "SSN", and "Case Number". Once you submit the Participant, the subsequent screen will give you an opportunity to set a "Start Date" and "Projected Termination Date" (when applicable).
- To see a list of all Participants available for enrollment in the selected program, leave the search boxes empty and click "Go."
- Participant Results are grouped into sets of 50. Select the desired participants (click "Next 50" to advance to the next 50 results).
- Click "Enroll with Different Start Dates" to enroll participants with separate start dates, "Enroll with Same Start Date" to enroll all selected participants for the same start date.
- You are given the option to provide a Projected Termination Date. This option is useful for Educational Programs, where all Participants complete the program on the same day. Projected Termination Date will Dismiss a Participant from the selected program automatically on the date specified if the program has been set up to Auto-Dismiss Participants.



## Enroll Participants (C)

(All Staff – Optional Feature)

This feature operates similar to Find Participant with the following exceptions:

- If a participant is currently enrolled or has ever been enrolled in a confidential program to which the staff person does not have access, that participant's name will not appear in the search results.
- If the participant(s) have never been enrolled *or* has been previously enrolled in a confidential program to which the staff person has access, the participant(s) first and last names, and case number (if applicable) will appear in the search results.
- Confidential features will not display the participants' SSN, DOB, or any other sensitive data in the search results.

## Dismiss Participants

(All Staff)

- You may "Dismiss Participants" from your current program using this feature. Participant records are not deleted, and a Participant may be re-enrolled at a later date.
  - Enter a partial or complete last name in the search box and click "Go."
  - Select Participants to be dismissed by "checking" the box next to their names. Use "Next 50" button if the list of available participants exceeds 50.
  - Click "Dismiss (Different Dates + Reasons)" to select a different date and reason for each participant. Use "Dismiss (Same dates + Reasons)" for programs where multiple participants will be dismissed for the same date and reason.

## Add Reliable Contacts

(All Staff)

- You can use *Add Reliable Contacts* to capture information on any individuals supporting a Participant, such as family, friends, social workers, medical professionals, and probation officers.
- There are a number of drop-down fields that your Site Administrator can manage (in the *Manage Feeder Tables* functionality under the *Site Administration* Component navigation bar) that allow you to capture important information about a Reliable Contact.
  - First, you can choose from a list of "Relationship options" (e.g., "Parent");
  - You can make a Reliable Contact an "Emergency Contact" by clicking that box;



- There is an "Attribute" field that allows your organization to define other important information (e.g., "Authorized Pick Up").
- You can add multiple *Reliable Contacts* for any Participant using this feature.

## View/Edit Reliable Contacts

(All Staff)

- If you're looking for a *Reliable Contact* for a Participant, you can find them here.
- If you need to revise information for a *Reliable Contact*, you will note that you can do this by clicking on "Edit this Contact" after accessing a Participant's contact information.

## Add/Edit Families

(All Staff)

- ETO Software™ allows you to identify "Families" by combining existing Participants in any Program in the Software. This feature allows an organization to capture the cumulative efforts and impact while serving individual members of that family, as shown in the "Family and Family Efforts Report" in the *Standard Reports* option under the *Reports* navigation bar.
- You can either "Add New Family" or "Edit Existing Family";
- To "Add New Family":
  - Type "Family Name";
  - You will note that all Participants with the last name you chose for your Family will appear. If Participants in the Family do not have the same last name, use the "Search for Others" link to find existing Participants to add to the Family;
  - Further define your family by using the "Select As Head" functionality in blue to choose one of the Participants as "Head of Household";
  - Finally, choose the family role from the drop-down box that best fits each Participant. Family Roles are pre-defined and can not be customized.
- To "Edit Existing Family":
  - Click on "Work With This Family" link in blue to revise "Head of Household", family roles, or to "Remove" a family member.
  - Click on "Edit Name" in green to edit Family name;
  - Click on "Delete Family" in red to delete Family (which does not delete each individual Family member's record).



## **Track Participant Processes**

(All Staff)

- Processes are sets of elements whose completion is critical to a Participant's status or eligibility in some programmatic objective. The most common example of this is the enrollment process for a program or organization.
- After selecting this feature, the user chooses the Participant with whom you wish to work. The next page will contain all active and new Participant Processes created by authorized users for Participants in your program. As you work with a Participant in a specific Process and check off the "Process Elements" completed, you log the date of completion using the date picker. Clicking "Today" will set the date to the current date. Clicking "Set All Un-set Dates..." will set all dates on the current page to the date that appears in the Date Picker. If you have not yet selected a date, a dialog box will alert you to pick a date. You also have the option of adding notes relating to that completion.
- You can work with a Participant on a "New Process" (for that individual) or review an "Existing Process" that the Participant has already started. If it is a new process, you will find it in blue text and you can begin by clicking on the process. If it is an existing process, you will find it in the "Select" box. Once the element is completed, review of the process for that participant will show the staff responsible for recording the completion, the date, and notes if applicable.

## **Conflict Check**

(Legal Staff, when applicable)

- This functionality, only used by legal Programs, allows you to check if a Participant (or a Legal Respondent in a Legal Case) already exists in your site.

## **Manage Groups**

(All Staff)

- This function allows you to create and manage individual participants a group that has consistent membership over time. This functionality makes tracking attendance and other outcomes for the group much easier.
- If no groups currently exist, you will need to "Add New Group" to the system.
- To add a new group, follow the following steps:
  - Select add new group.
  - Enter a name for the group.
  - Select "Disabled" if this group is not yet active. This can be changed later, on the Manage Groups screen.
  - Select a Start Date (required) and End Date (optional).



- Group Description: Any text entered here will show up under the title of the group on the Manage Groups screen.
- Once you've added a new group, click on "Group Members", where you can add participants from your Program through a quick search function.
- At any time, you can review all Groups in your Program; "Edit" your Group "Name", "Description", Start and End Dates; and use the "Group Members" link to manage Group membership.
- Only a Site Administrator can "Disable" a Group once it's set up.



## Navigation Component: Participant History

Description: This Navigation element is focused on building and managing a rich historical record for a Participant, including Program Services Provided, Assessments, Employment, Education, and Legal Cases (when applicable).

### Participant Assessment

(All Staff)

- This functionality allows you to utilize assessments that a Site Administrator has created for Participants, Entities, Staff, or General Assessments.
- To complete an Assessment for a Participant:
  - Search for Participant
  - Choose "Take New Assessment"
  - Choose from the list of existing Assessments;
  - Complete Assessment and "Continue". This will bring you to the response review screen. You must click "Submit Assessment Information" to complete the assessment. If you need to edit a response, click "Go Back" (not IE's back button) and you will be able to make those edits.
- To continue working with a Participant on an Assessment, "Select Type of Assessment" from the list; choose your Participant; and choose to either *Update Assessment* or view the *Assessment Report*.
- You can now delete an assessment taken by a participant. To do this, first search for the participant. Once you select the participant, all assessments taken for this participant are listed. Click the Delete link, and you will receive a confirmation dialog box that the assessment has been deleted for this participant.

### Review Participant Efforts

(All Staff)

- This core feature provides a viewable and printable record of all efforts that have been recorded by all ETO Software™ users with any Participant. This provides a compelling record of your organization's efforts towards meeting outcomes for individual Participants. In addition, it is a very effective method of communication between different staff working with the same Participant.
- Simply choose a Participant from your Program; *Select Dates for Review*; and your *Review Participant Efforts* page appears.



- The first level of the report shows the Participant's active programs and provides *Summary Statistics* for *Outcomes, Efforts, Attendance, Employment, Education, Processes, and Referral* information.
- Additional sub-levels provide in-depth details about each of the areas above, including functionality that allows users to "drill down" into *Outcome Details* and *Notes* that show the staff who worked with the Participant, where the contact occurred and full case notes. For a complete look, click on "Open All Toggles" at the top of the details section.
- You also can review Composite Outcomes details.

## Participant Program History

(All Staff)

- This report allows you to review all Participants currently enrolled in your Program, showing "DOB", "Start Date", "Days in Program", and "Program History".
- "Program History" provides information on all the Programs in which the Participant is or has been involved.
- Only Site Administrators have the ability to edit or delete a participant's Program History record.

## Add Criminal Record

(All Staff)

- This feature has been designed specifically for organizations that are working with Participants who are engaged in the criminal justice system. It allows for the tracking of arrests, releases, and different charges brought against Participants and movement of participants off of probation and parole.
- To create a Criminal Record:
  - Search for a Participant;
  - Select a "Start Date", which is an action date and could be considered the arrest date, the charging date, or whatever date is being entered into the system;
  - Choose a "Criminal Charge Type". These are intended to be broad categories of charges and can be built out by the Site Administrator depending on what information needs to be tracked. Examples might be "Criminal" or "Civil";
  - Choose a "Criminal Charge", which could be the name of the actual charge;
- Choose an event, which conveys what part of the criminal justice process is taking place (e.g., "Arrest" or "Trial Date").



## Review Criminal Record

(All Staff)

- This component contains all of a Participant's "Criminal History", so you can review it as required.
- You also can edit any of the criminal records by clicking on "Edit this Criminal Record".

## Add Drug Record

(All Staff)

- This component allows you to capture information about a Participant's current or former drug use, based on the results of past or present drug tests.
- You can include information about "Treatment Type", "Drug Test Result", and "Drug Type" (all of which are populated by the Site Administrator in the *Add Feeder Tables* functionality under the *Site Administration* navigation bar.

## Review Drug Record

(All Staff)

- This component contains all of a Participant's "Drug History" (as captured by drug tests) for your review.
- You also can edit any of a Participant's drug records by clicking on "Edit this Drug History Record".

## Add Education Record

(All Staff)

- This component is very important if your organization wishes to capture "Education Placements" (e.g., enrollment in High School) for Participants, which feeds your "Education Placement Report" in the *Crystal Reports* functionality under the *Reports* navigation bar.
- You can capture a Participant's current and former "Education History". The information includes the "Education Institution" (populated through *Manage Entities*), "Education Level", "Start Date", "End Date" (when applicable), "Reason for Dismissal", and it has a check-off box for "Education Completed".



## Update Education Record

(All Staff)

- This component is very important if your organization wishes to track "Education Retention" and "Advancement" (e.g., movement into Post-Secondary Education) for Participants.
- This component contains all of a Participant's "Education History" dating back as far as you wish to capture. The key features are:
  - "Add Education Detail Record": This functionality allows you to capture a Participant's movement from one "Education Level" to another (e.g., "High School" to "Post-Secondary" or "8<sup>th</sup> Grade" to "9<sup>th</sup> Grade"). This is essential information that feeds your "Education Advancements Report" in the *Standard Reports* functionality under the *Reports* navigation bar. You also can click "Edit" in any record to revise the information.
  - "Edit/Dismiss Education Record": This functionality allows you to edit previously submitted information or "Dismiss" a Participant from an "Education Institution". "Reasons for Dismissal" (populated through *Manage Feeder Tables*) can be for positive reasons (e.g., "Graduation") or not-so-positive reasons ("Poor Attendance"). If a Participant graduates or otherwise "completes" her education, there is an "Education Completed" box to check.

## Add Employment Record

(All Staff)

**Employment Records can be entered for any date. Employment Reports will only report on data after January 1, 1994.**

- "Add Employment" allows you to capture and review employment placements, and also build former employment histories. This option is particularly important for workforce development programs or initiatives, or those programs or initiatives that have workforce development components.
- The "Add Employment Record" functionality relates directly to the "Employment Placement" Outcome in ETO Software™. Usually, a staff person works with a Participant for some time on the "Employment Placement" Outcome, and then through this hard work a placement occurs and it is recorded here. This ETO™ ("Efforts-to-Outcomes") relationship is very powerful for your organization and those who support you.
- To "Add an Employment Record", choose a Participant and complete the next page. This page includes the following elements (with notes included where helpful):
  - "Job Title"
  - "Start Employment Date": This date starts the ticker for your "Employment Retention Reports".



- “Employer”: You populate your system with your Employers. They can be added directly in this functionality, or you can add them with more detailed contact information under the *Manage Entities* functionality under the *Entities* navigation bar.
  - “Terminated”: Check this box if you are recording a “Previous Employment” and want to capture the “Termination Date”, which will appear when this box is checked.
  - “Reason for Dismissal”: This is a master list of dismissal reasons created by the Site Administrator in the *Add Feeder Tables* functionality under the *Site Administration* navigation bar.
  - “Hourly Wage”: No \$ is needed, only numbers.
  - “Hours Per Week”
  - “Benefit Type”: This drop-down box is populated by the Site Administrator in the *Manage Feeder Tables* functionality.
  - “Employment Status”: This drop-down box comes pre-populated with “Full-Time”, “Part-Time”, and “Seasonal” options.
  - “Placement Type”: This drop-down box is populated by the Site Administrator in the *Manage Feeder Tables* functionality.
  - “Employment Type”: This is a customizable element that allows the Site Administrator to define an additional field that stays consistent with an employment over time (e.g., “Job Counselor”).
  - “Employment Details Type”: This is a customizable element that allows the Site Administrator to define an additional field that can be updated in an employment over time (e.g., “Job Performance”).
  - “Previous Employment”: Check this box when you are building a Participant’s past employment history. When you check this box, the employment information doesn’t populate your *Employment Reports*, as the employment wasn’t a result of your work.
- You now have the option to add Custom Fields to capture information your organization may find relevant to placements. These fields are similar to the Custom Demographics and Attributes listed elsewhere in this manual. Please see details for **Manage Employment Fields** under Site Administration component listed in this manual.

## Update Employment Record

(All Staff)

- *Update Employment Record* lets you do the following three things:
- “Add New Employment Detail”: This is used to capture changes (usually “Advancements”) in current employments (e.g., increases in pay, hours, or benefits).
  - “Edit/Terminate This Employment”: This is used to capture employment “Terminations” (for positive or less-than-positive reasons) and to correct employment information previously submitted. You will note that you can’t



edit all previously submitted information, as some of these elements stay consistent over time.

- "Delete This Entire Employment": This last option should only be used if you mistakenly recorded an employment record.
  
- You may Update a participant's employment record after adding a Custom Employment Field, to reflect the information captured with the new fields.



## Navigation Component: Record Efforts

Description: This is where you will record your efforts toward the accomplishment of your organization's outcomes, which is the heart of ETO Software™. This is where you can capture and celebrate the incremental victories that occur every day with the Participants with whom you work. Your recorded efforts continue to provide benefits to you and your organization in your To Do lists, ETO Reports, and the ability to Review My Work, Review Participant Efforts, and Review Entity Efforts, all of which are described later in this manual.

### Participant Efforts

(All Staff)

- This is usually the most utilized feature in ETO Software™. In most cases, staff uses this functionality to get Participants on their *To Do* lists so they can actively manage them. Getting a Participant on your *To Do* lists occurs when you **record your first effort** with a Participant **towards a specific Outcome** and **assign a "Date of Next Contact"**.
- To record a *Participant Effort*, search for the Participant by last name, Social Security number, or case number. Select the Participant from the list that appears.
- As you know, ETO Software™ is unique in that it asks you to be specific about which of your organizationally defined Outcomes you're working on with the Participant you've chosen. Select the Outcome from the drop-down box and "Submit".
- Fully complete the "Record Efforts Toward Outcomes" page, which may contain some or all of the following elements:
  - "Outcome";
  - "Contact Location", which is a required field populated by the Site Administrator in the *Manage Feeder Tables* functionality;
  - "Date of Contact", which is a required field and set in this page based on the date chosen in the step before (**this date cannot be in the future**);
  - "Date of Next Contact", which is the date you will next be working with this Participant on this Outcome, and it gets the Participant on to your *To Do* lists and helps you manage your caseload. There are quick links to "1", "7", "30", and "90" days to the right of the date picker.
  - "Last Value Assigned", which is the last value recorded for this Participant in this Outcome. If this is the first time this Outcome has been paired with this Participant, you will see "No Value Assigned";
  - "New Value for Outcome", which allows you to update your former value or set your initial value for this Outcome;
  - "Time Spent on Contact": This is the amount of time (in minutes) that you spent with the Participant on this Outcome contact;



- “Notes”, which accommodates up to 8,000 characters and will accommodate cut and paste from Microsoft Word and Outlook/emails, etc.
- Submit the effort by clicking on “Save Effort” (which takes you back to the Participant search functionality) or “Save and Record Similar Effort” (which takes you back to the same page you just recorded).

**Again, once you’ve recorded this first effort towards a specific Outcome with a Participant, you can record future efforts through your *To Do: Today or To Do: Participants* list, which are described later in this manual.**

## Record Attendance

(All Staff)

- This is an efficient functionality for recording attendance in ETO Software (which can also be handled in “Multiple Participant Efforts”).
- There are two important notes related to this functionality:
  - This feature is built around the date for which you are intending to record attendance. You will not be able to record attendance for Participants whose start date is after the date of attendance. This prevents inaccurate data entry.
  - A case note recorded with multiple Participants will flow to each Participant’s individual case file, so the note should be general.
- Simply follow these steps to use this functionality:
  - First, choose the date on which you wish to Record Attendance and “Submit”.
  - Next, choose your Attendance Outcome from the drop-down list and “Submit”.
  - You have the option of recording an effort with a “Group” you’ve created in the *Manage Groups* functionality under the *Participants* navigation bar; or choosing from a list of all “Participants” currently enrolled in your Program (you can select all of the Participants or a subset of them). Click “Submit” once you’ve made your choice.
  - As you know, ETO Software™ is unique in that it asks you to be specific about which of your organizationally-defined Outcomes you’re working on with the Participants you’ve chosen. Select the Outcome from the drop-down box and “Submit”.
  - Fully complete the “Record Efforts Toward Outcomes” page, which may contain some or all of the following elements:
    - “Outcome”;
    - “Contact Location”, which is a required field populated by the Site Administrator in the *Manage Feeder Tables* functionality;
    - “Date of Contact”, which is a required field and set in this page based on the date chosen in the step before (**this date cannot be in the future**);
    - “Date of Next Contact”, which will only appear if you are doing attendance with a “Group”. This date is the date you will next be working with this Group on this Outcome, and it gets the Group on to your *To Do* lists and



helps you manage your caseload. There are quick links to "1", "7", "30", and "90" days to the right of the date picker. This date can not be prior to today's date.

- "Last Value Assigned", which in this case will be their last attendance outcome. If this is the first time this Outcome has been paired with this Participant, you will see "No Value Assigned";
- "New Value for Outcome", which allows you to update your former value or set your initial value for this Outcome;
- "Time Spent on Contact": This is the amount of time (in minutes) that you spent with the Participant on this Outcome contact;
- "Notes", which accommodates up to 8,000 characters and will accommodate cut and paste from Microsoft Word and Outlook/emails, etc.
- Submit the effort by clicking on "Save Effort" (which takes you back to the Participant search functionality) or "Save and Record Similar Effort" (which takes you back to the same page you just recorded).

## Record Hours of Attendance

(All Staff)

- This feature allows recording attendance (in hours). Attendance can be recorded towards select participant(s) or predefined group.
- Simply follow these steps to use this functionality:
  - First, you have the option of recording an effort with a "Group" you've created in the *Manage Groups* functionality under the *Participants* navigation bar; or choosing from a list of all "Participants" currently enrolled in your Program (you can select all of the Participants or a subset of them). Click "Submit" once you've made your choice.
  - Next, choose your Attendance Outcome from the drop-down list and click "Submit"

Fully complete the "Record Efforts Toward Outcomes" page, which may contain some or all of the following elements:

- "Outcome";
- "Contact Location", which is a required field populated by the Site Administrator in the *Manage Feeder Tables* functionality;
- "Date of Contact", which is a required field and set in this page based on the date chosen in the step before (**this date cannot be in the future**);
- "Date of Next Contact", which will only appear if you are doing attendance with a "Group". This date is the date you will next be working with this Group on this Outcome, and it gets the Group on to your *To Do* lists and helps you manage your caseload. There are quick links to "1", "7", "30", and "90" days to the right of the date picker. This date can not be prior to today's date.
- Indicate the Hours of attendance for each Attendance Outcome.



- "Notes", which accommodates up to 8,000 characters and will accommodate cut and paste from Microsoft Word and Outlook/emails, etc.
- Submit the effort by clicking on "Record Effort" (which takes you back to the "Select Group or Participant Efforts" screen).

## Multiple Participant Efforts

(All Staff)

- This feature facilitates recording efforts with more than one Participant, as will frequently occur with attendance Outcomes or group workshops. You have the option of recording an effort with a "Group" you've created in the Manage Groups functionality under the Participants navigation bar; or choosing from a list of all Participants currently enrolled in your Program (you can select all of the Participants or a subset of them).
- There are two important notes related to the Multiple Participants Efforts functionality:
  - The case note recorded for all Group efforts will flow to each Participant's individual case file, so the note should be general.
  - When recording a Multiple Participant Effort, remember that an effort with a Group will allow you to set a "Date of Next Contact", while an effort recorded with un-grouped participants does not include a "Date of Next Contact", so these events are not manageable through your To Do Lists.
- After choosing your "Group" or list of Participants, you will be prompted to select an Outcome from the drop-down list of Program Outcomes.
- Tracking Attendance is a common use of the *Multiple Participants Efforts* functionality. To track attendance, follow these steps:
  - Choose your "Group" or check all Participants from your Program Enrollment list who were supposed to be in attendance;
  - Choose the appropriate Attendance Outcome and "Submit";
  - Check all Participants who were in attendance and "Submit".
- To prevent different staff from recording the same Attendance Outcomes for Participants on the same day, ETO Software™ alerts you with a pop-up message if you submit an Attendance Outcome that already exists in the Software. If you still wish to submit the Outcome (e.g., if you're running a two-part workshop and you want to capture attendance in both sessions), ETO Software™ will allow you to do so.
- **Note: This feature will not filter out participants if their start date is after the date of attendance.**



## Track Multi-Attendance

(All Staff)

- If the Site Administrator has built a "Composite Attendance Outcome" (linking a number of Attendance Outcomes in one Outcome, as described in the *Outcomes* section of this Manual), you will find it at the top of your Attendance Outcomes list.
- Follow the same procedure for tracking attendance as described above.

## Add Referral

(All Staff)

- This function allows you to capture the referral of any Participant to another "Entity" (outside your organization) or "Program" (within your ETO Software™). To refer to an "Entity", it first has to be added to the Site and Program as a "Service Provider" or "Employer" in the *Manage Entities* functionality under the *Entities* navigation bar. A "Program" exists to be referred to as soon as it's created in the Site. You must first choose the type of referral, "To Service Provider", "Employer", or "Program."
- Once you select the type of referral, you will see a drop down menu containing the names of your selected referral type.
- The *Add Referral* functionality includes the following elements:
  - "Reason for Referral": This is the universal list of reasons for referral created by your Site Administrator in the *Manage Feeder Tables* functionality. This is not a required field.
  - "Referral Date": This is the date the Participant was referred.
  - "Pending Drop Off Date": This element can be used if a Participant has a window of time within which they can enroll at the Service Provider or Program to whom you've referred them.
  - "Referral Status": This field allows you to set an initial referral status (e.g., "Referred") and later update it (e.g., "Receiving Services"). The Site Administrator creates this drop-down box in the *Manage Feeder Tables* functionality.
  - "Release Client Information": This is relevant when referring to another Program in your Site or within an Enterprise Edition when referring between Sites.
- Once you've completed this information, click "Add Referral".
- You are now also able to refer an Educational Institution to a participant.



## View/Edit Referrals

(All Staff)

- This is the place to review referrals made by your Program to Entities outside your organization or other Programs in your Site.
- You now have the ability to View Referral information a single participant, participants in a specific program, or participants across the site.
- *Show Single Participant* – Allows you to search for one participant.
- *Show all Participants Enrolled in Program* – Shows all participants enrolled in the program you are currently in.
- *Show all Participants across site* – Shows all participants across your entire site.
  - “Details”: This functionality allows you to view the details of the referral and to update the “Referral Status” of the Participant by clicking on the green “Add Details” towards the bottom of the record and clicking on “Add Referral Details”. For example, if you refer a Participant to a “Service Provider” and she is accepted, you would change her status from “Awaiting Admission” to “Accepted” (Note: these are examples of “Referral Status” that your authorized users will define);
  - “Edit”: This allows you to edit any of the initial information you submitted;
  - “Delete”: This allows you to completely delete the referral record. Please be very careful with this functionality.
  - “Print”: Provides a Printable Summary Screen of all referrals pertaining to that participant.

## View Pending Referrals

(All Staff)

- This functionality allows you to see any Participants who have been referred to your Program by another Program in your Site. For example, if you have an “Intake Program” that manages enrollments for all Programs, when a Participant completes the enrollment process, she can be referred to your Program by the Intake Program.
- To *View Pending Referrals*, choose the “Program” option (the “Site” option also is possible within ETO Software™ Enterprise Editions, where one Site refers Participant to another Site within the same Enterprise Edition). The next page will be a list of all “Referring Programs” and “Participants” referred, with other pertinent data. For each Participant, you have the option to “Accept” or “Not Accept” the Participant. If you do the former, the Participant is enrolled in your Program as of the date you accept them; if you do the latter, a new page will



appear that allows you to choose a "Rejection Reason" (the same as your universal "Dismissal Reasons") and "Submit".

- When you submit that you "Accept" or do "Not Accept" the referral, it automatically updates the "View/Edit Referrals" record of the Participant in the referring program so your Programs can most effectively communicate referral information.

### **View Multi-Attendance**

(Program Manager and Site Administrator)

- This is where Managers can view the Participant results of Multi-Attendance Outcome(s). The information is broken down by "Group" (in this case, the generic term used to capture either the "Group" you've created or the list of Participants you chose; "Date"; and "Contact Location". Managers can also click on "Details" to get the full list of Participant in any particular "Group" and their respective Attendance Outcomes.

### **Edit Attendance**

(Program Manager and Site Administrator)

- This functionality allows Managers to edit any of the attendance outcomes that have been submitted in ETO Software™. Simply choose the date of the Outcome you want to edit, choose your Attendance Outcome, and all the Attendance Outcomes for that day will appear. Click in the box (for "in attendance") or leave it blank (for "not in attendance") next to the Participants you wish to change and click "Update Effort".

### **Take a Survey**

(All Staff; Survey Taker)

- This component is available to users authorized to take the Surveys created by Managers in ETO Software™. Users accessing the Software as "Survey Takers" only see this option, preventing their unauthorized access to confidential records.
- To take a Survey, select the appropriate Survey from the "Select Survey" drop-down box and "Continue"; fill in all information and "Continue"; and if you are satisfied with your responses as listed on the final page, "Submit Survey Information" (if not, use the "Go Back" button and revise as necessary).



## General Efforts

(All Staff)

- ETO Software™ also allows you to capture your efforts towards achieving General Outcomes, which are administrative, organizational, and strategic outcomes such as conducting general outreach activities, developing program marketing materials, and completing administrative tasks. These Outcomes are *General* because they are not related to specific *Participants* or *Entities*.
- To work on a General Effort, "Select a Program Outcome" from the drop-down list and record your effort. You will note that there is no need to define a Participant or Entity, as these are internal, administration-oriented outcomes. As with Participant Efforts and Entity Efforts, once you've recorded an effort, you can record future efforts through your *To Do: Today* and *To Do: General* lists.

## Manage Rooms

(All Staff)

- If you're providing housing services, this is one of two options for managing occupancy in a shelter or residence. Social Solutions will set up in ETO Software™ your specific rooms (e.g., "Apt. 3") in as many residences as you manage, after which you can track which Participants are in which rooms on a regular basis. Each room record can contain "Unit", "Room", "Attributes" (e.g., "ADA Compliant"), "Beds Available", "Beds Filled", and "% Beds Filled" information.
- The Manage Rooms functionality starts with a list of your currently enrolled Participants, including read-only information about their room and how long they've been residing there.
- This functionality also allows you to "Enter" a Participant into a room if they are not currently occupying a room; or to "Exit" a Participant from a room if they are currently occupying a room. You also can check "All Participants Currently Occupying a Room" or "All Participants NOT Currently Occupying a Room", which will automatically check all Participants who meet either of these criteria.
- To work with a Participant, follow these steps:
  - Check the box next to your Participant and "Submit".
  - If you are working with a Participant currently occupying a room and wish to "Exit" the Participant from the room, click "Exit" and use the date picker to pick your "Exit" date, and "Submit".
  - If you are working with a Participant NOT currently occupying a room and wish to "Enter" the person into a room, click "Enter", pick your room from the drop-down list, use the date picker to pick your "Enter" date, and "Submit". You will



note that we have provided a quick link to "Yesterday" when picking the date, as this is often the date used when entering a Participant into a room.

## **Manage All Rooms**

(All Staff)

- If you're providing housing services, this is one of two options for managing occupancy in a shelter or residence. Social Solutions will set up in ETO Software™ your specific rooms (e.g., "Apt. 3") in as many residences as you manage, after which you can track which Participants are in which rooms on a regular basis. Each room record can contain "Unit", "Room", "Attributes" (e.g., "ADA Compliant"), "Beds Available", "Beds Filled", and "% Beds Filled" information.
- The Manage All Rooms functionality starts with a full list of all your rooms and occupant information when applicable.
- Each room contains a "Manage Room" link in blue to the right of the record, which allows you to "Add New Occupant(s)" to the room (using "Participant" or "Family" search functionality) or "Exit" an Occupant from a room. In either case, you will use a date picker to choose your date and "Submit".



## Navigation Component: My Work

Description: This is your personalized section of ETO Software™. Your To Do Lists provide snapshots of your last contacts towards specific outcomes with Participants (and with General activities), and provide real-time data management tools and shortcuts directly to the Record Efforts section of ETO Software™.

### To Do: Today

(All Staff)

- This is where you will spend much of your time in ETO Software™, as it can help you manage on a daily basis any number of activities with Participants, Entities, and General administrative efforts. Your *To Do: Today* list is compiled from your Participant, Entity, and General efforts, starting with contacts due today, and including any past-due contacts in red. Where contacts fall on the same day, they are viewable in the order of Participant, Entity, and General Efforts. You will note that if you're working with a Participant or Entity on a number of different Outcomes, each of these records that are due today (or in the past) will appear on your *To Do: Today* list.
- To maximize the functionality of your *To Do Lists*, it is advisable to get all your active Participants and Entities (and your *General* efforts) on to your *To Do* lists, and then manage them through the following functionality:
  - *Record Effort*: This link allows you to jump directly from your *To Do: Today* list to the *Record Efforts Toward Outcome* page for the *Participant* and *Outcome* on your list (instead of going back to the *Record Efforts* navigation bar). This feature will allow you to record an effort toward the outcome which appears on the To Do List.
  - *Review Efforts*: This link allows you to review all efforts by any users in your Program with the *Participant* and that particular *Outcome*. This can be very helpful to direct service professionals who jointly work with Participants.
- By clicking the name of the participant or entity on your *To Do Lists*, you can display contact information for that entity, including telephone number(s) and email address(es). This feature is standard across *To Do Participants* and *To Do Entities* lists as well as *To Do Today* lists.



## To Do: Participants

(All Staff)

- While your *To Do: Today* list compiles contacts from your Participants, Entities, and General Outcomes chronologically, the *To Do: Participants* list is focused solely on your caseload. Every Participant with whom you've worked on any Outcome that includes a *Date of Next Contact* will appear on this list. As you regularly use ETO Software™, this list becomes your caseload manager.
- You will note that all Participants on your *To Do* list have similar shortcuts to those on your *To Do: Today* list, with the addition of one new link:
  - *Other Outcomes*: This feature will allow you to see all scheduled future contacts linked to the selected participant, allowing you to record efforts right from the *To Do: Participants* list.

## To Do: Entities

(All Staff)

- This functionality provides you with a *To Do* list for Entities (which are fully described in the next section). This feature can be very helpful to staff who work with "leveraging partners" in the community, and fund development professionals.
- Every Participant with whom you've worked on any Outcome that includes a *Date of Next Contact* will appear on this list.
- To maximize the functionality of your *To Do: Entities* list, it is advisable to get all your active Entities on to your list, and then manage them through the following functionality:
  - *Record Effort*: This link allows you to jump directly from your *To Do: Entities* list to the *Record Efforts Toward Outcome* page for the *Entity* and *Outcome* on your list (instead of going back to the *Record Efforts* navigation bar).
  - *Review Efforts*: This link allows you to review all efforts by any users in your Program with the *Entity* and that particular *Outcome*. This can be very helpful to users who jointly work with Entity partners.

## To Do: General

(All Staff)

- This provides you with a *To Do* list for your *General Outcomes*, categorized alphabetically by Outcome.



## To Do Dates

(Staff)

- This functionality allows you to review your *To Do* lists from your Participant, Entity and General efforts. Unlike *To Do Today*, this allows you see a list of your contacts for a range of dates or a date in the future.
- There are four periods that you may choose from in *To Do Dates*:
  - *This Week* begins on Sunday of the current week and ends on the following Saturday.
  - *Next Week* begins on Sunday of the following week and ends on Saturday.
  - *A Specific Day* allows you to choose one particular day. When you select this choice, it automatically comes up as today's date. You may change this using the date picker.
  - *A Date Range* allows you to view your *To Do Lists* for any range of dates. When you select this, the range is automatically set to start on the current date and end 7 days later. You may change this using the date picker.

## Review My Efforts

(All Staff)

- This functionality provides a viewable and printable record of all efforts that you have recorded in ETO Software™.
- To access these records, simply type in a date range and *Submit*. Your report will look very much like the second half of the *Review Participant Efforts* report available under *Participant History*, with sections for *Participant*, *Entity*, and *General Outcomes*; *Participant Placement Data*; *Participant Education Placement Data*; and *Referral Data*. Each of these sections allow you to *Toggle Details* for more information in any particular area, including "drilling down" into *Outcome Details* and *Notes* that show the Participants with whom you worked, where the contact occurred, and full case notes.

## Edit My Efforts

(All Staff)

- This function allows you to edit any of the efforts you have recorded in ETO Software™. Simply choose the date of the note you want to edit and all your efforts for that day will appear. Click on *Edit This Record* to the right of the note, make changes, and click *Update Effort*. You can delete the effort by clicking *Delete this Record*.
- Staff that are at a higher level of access have the ability to edit the efforts of the staff below them.



## Manage Personal Settings

(All Staff)

- This feature will allow users to customize their individual ETO Software™ experience. Using Personal Settings, the user can dictate:
  - Whether or not the system remembers the last value used to search for a participant in the system
  - Whether or not the system alerts you when you neglect to provide a Date of Next Contact when recording an effort
  
- **Date of Next Contact Follow-up**
  - The first time you record an effort and do not provide a date of next contact, you will see a dialog box prompting you to set a date of next contact. If you click no, you will see a dialog box asking if you want the system to “remember” your preferences.
  
- **Previously Used Search Value**
  - The first time you search for a participant, whether it be using Find Participant, View/Edit Participant, Participant Assessment, or Recording Efforts, you will see a Dialog box asking you if you would like the system to “remember” the last value (participant name, Case Number, Social, etc.) you searched for. This is beneficial if you intend to work extensively with a single participant.
  
- **Manage Personal Settings**
  - This feature is the “Control Panel” for your personal settings reminders. If you select “I don’t know,” you will see the dialog boxes (previously mentioned in this document) every time you use an affected feature.

These features will remain in effect until your “cookies” are reset or deleted. Please see this reference for more details about Cookies:

<http://www.microsoft.com/info/cookies.htm>

## Edit Attendance

(All Staff)

- Will allow you to edit Attendance information entered via **Record Attendance**.
  
- This will only allow you to edit Regular Attendance (not Hours of Attendance (see below)).
  - Select this feature.
  - Choose the appropriate Attendance Outcome and date.
  - Attendance recorded for that date will appear “Grouped by Effort.” If you entered attendance for more than one “Group” of participants, those participants will appear grouped in the order Attendance was entered.



- A checked box under the Attendance Outcome name indicates a Participant was present. Uncheck the box to mark the participant absent.
- Click **Update Changes** to record the changes made.

## Edit Hours of Attendance

(All Staff)

This feature will allow you to edit efforts recorded towards Hours of Attendance.

- Choose the appropriate Attendance Outcome.
- Select the desired date (all dates for which Hours of Attendance were recorded are listed) to edit.
- Make any necessary changes and click **Save Changes**.

## Send Message

(All Staff)

- This feature facilitates the flow of Participant, Program, and Software related information to all identified system users. You can send messages to one or more users, and Site Administrators can post "Marquee" messages to communicate important organizational information to all system users simultaneously.

## Read Message

(All Staff)

- Messages may be retrieved through the *Read New Message* alert that shows up in the upper right corner of the screen when a user logs on. You also can retrieve your messages using this option.
- Messages are not available to users until the message has been sent and the user has logged onto the Software. Messages sent while the user is logged on are not available until the user logs off and logs on to the Software again.
- You can also Reply to Sender or Delete the message using this function.



## Navigation Component: Entities

Description: This component focuses on your work with Entities, which are third parties, whose assets and resources are critical to your organization's success. Common examples of Entities are referral agencies, initiative partners, employers, Boards of Directors, and mentors.

### Add Attribute by Group

(All Staff)

- This feature allows you to update custom attributes for multiple entities at the same time.
- Select from the list of site-specific and program-specific custom attributes.
- Select Entity Type, Sub-Type or Entity to choose which entities you would like to update. Selecting Entity will give you a check list of all entities in your program similar to Multiple Entity Efforts. Select the desired entities and click Submit.
- Update the attribute for your entities and click Submit to make your changes.

### Find Entity

(All Staff)

- This functionality operates in a similar manner to the *Find Participant* option covered earlier, allowing you to find any Entity in your ETO Software across all Programs in your Site.
- Use the *Search* functionality to find your Entity by typing in "Entity Name", "Entity Type", "Sub-Type" or "Contact Last Name".
- If the Entity exists in ETO Software, you can "manage" the Entity in a number of ways. For example, if the Entity isn't yet assigned to your Program, you can bring it into your Program by clicking on Program Information and adding that entity to any program across your site.

### Add New Entity

(All Staff)

- This function allows you to add an Entity to the Software. You are asked to supply an Entity and designate the type of Entity, of which there are seven. The following list is the Entity Types available in ETO Software™:
  - Businesses: Use this designation to track vendors, fundraising prospects and other businesses that do not fit into the other types.
  - Education Institution: Entities with this type designated will populate the drop-down boxes in the Education Component (found under Participant History)
  - Employers: Entities with this designation will populate the Employment Component (found under Participant History)



- **Funding Source:** This designation is appropriate for designating funders, particularly when they are funding specific participants in various programs. Any Entity designated a Funding Source will appear in the Funding Source drop down box on the Add New Participant screen.
  - **Individuals:** This designation will apply to mentors, board members and other individuals that are stakeholders in your organization.
  - **Referral Source:** This Entity Type designation allows you to designate organizations that refer participants for services. Entities with this selection will populate the Referral Source drop down box on the Add New Participant screen.
  - **Service Providers:** This Entity Type designation is used to identify organizations that your organization might refer participants to for services. Entities with this designation will populate the drop down box in the referral section under the Record Efforts section.
- In ETO Software™, Entity Sub-Types are a means for sites to create their own categories of Entities for easy editing and retrieval. For more information on Entity Sub-Types, see below.
- After designating a Type and Sub-Type for the Entity, if the Entity is an Individual, check the "Is an Individual" box, which will automatically populate the contact information box for the Entity.
- If the Entity is an organization, fill out the address information and then click on the "Add Entity to the System" button. The Entity will then be added to your site. You will then be asked whether or not this Entity should be added to your Program. Like Participants, Entities can be shared between programs in your Site or Program specific. Generally, it is best to add Entities within the program where they will typically be accessed.
- After indicating whether or not you want the Entity to be a part of the program you are in, you will then be asked in you wish to "Manage the Entity". Managing the Entity consists of adding contact information to the Entity. Click on "Add New Contact" and enter information.
- After contacts have been added to the system, you can add any number of phone numbers to each individual contact by clicking on *Edit Entity*. Click "Phone" and add all new numbers. The Software will store each of these numbers as "Pending" numbers until you click on *Record Pending Phone Information*.

## View/Edit Entity

(All Staff)

- This feature is where you are able to update or view your entity information.



- To search for an entity, you can use the full or partial entity name, Entity Type or Sub-Type or contact last name.
- After updating your information, click Update Entity at the bottom of the screen to save your information.

## Manage Entities

(All Staff)

- View Entities by Type - With this feature, you can create a quick list of your Entities by Type and Sub-Type, if necessary.
- You can view entities by type and sub-type, and enroll and dismiss multiple entities from your program at the same time.
- Select the Entity Type (and Sub-Type if desired). Click View Entities and click on the blue link for the type you want to work with. From here, you will be able to enable/disable the entities, enroll/dismiss them from your program, view their program information and click on their name to go to their edit screen.
- To enroll/dismiss multiple entities, click on the desired sub-type to show all entities. Check the button next to each entity to enroll/dismiss entities from your program. After you have made your selections, click Save Program Enrollment/Dismissal Changes.

## Manage Program Entities

(Site Administrator)

- When a new program is added to your site, you may now add multiple entities to that program at one time, instead of individually adding them under *Manage Entity* or *Edit Entity*.
- Select the new program in the drop down box at the top of the screen. Select *Manage Program Entities*, under *Entities*. There will be a list of the different types of entities in your site. You may select all entities from one type, or click on the entity type to choose individuals from a drop down list.
- Select all entities that you wish to add to your program and click submit.

## Record Entity Efforts

(All Staff)

- To *Record an Entity Effort*, search for the Entity by *Entity Name*, *Entity Type*, *Sub-Type*, or *Contact Last Name*. Select the Entity from the list that appears.



- As you know, ETO Software™ is unique in that it asks you to be specific about which of your organizationally-defined *Outcomes* you're working on with the Entity you've chosen. Select the *Outcome* from the drop-down box and *Submit*.
- Fully complete the *Record Efforts Toward Outcomes* page, which contains the following elements (with notes where helpful):
  - *Last Value Assigned*: This will be the number, value, or other element last recorded with this Entity (when applicable)
  - *Contact Location*: This drop-down is populated by the Site Administrator in the *Manage Feeder Tables* functionality.
  - *Date of Contact*: This date cannot be in the future.
  - *Date of Next Contact*: This date gets the Entity on your *To Do List*, and helps you manage your caseload.
  - *Time Spent on Contact*: This is the amount of time (in minutes) that you spent with the Entity on this Outcome contact.
  - *New Value for Outcome*: Whether you're working with a "Yes/No", value-driven, number, or other type of Outcome, this is where you will set your initial value or update your former value for this Outcome.
- **Again, once you've recorded this first effort towards a specific Outcome with an Entity, you can record future efforts through your *To Do: Today* or *To Do: Entities* list.**
- There is now a function to "Save & Manage Entity", which enables you to save your effort and immediately go to the "Manage Entity" page.

## Multiple Entity Efforts

(All Staff)

- You also can track your *Multiple Entity Efforts*, where you work with more than one Entity on a single Outcome. This function can be helpful in capturing mailings, group emails, or other mass communications. In addition, if you are tracking volunteer or mentor hours, this is an easy way to update everyone's time on a regular basis.
- You can choose your Entities using a very logical *Entity Type* and *Sub Type* system, as follows:
  - The first level of Entity organization is the seven Entity Types described above (e.g., "Employers"). You can choose to work with *All Entities of (that) Type*, or you can search at the next level by clicking on the Entity Type (in blue);
  - The next level is Entity Sub-Types (e.g., "Active Employers"). You can choose to work with *All Entities of Type/Sub-Type*, or you can search at the next level by clicking on the Entity Sub-Type (in blue);
  - The third level brings you to the list of Entities under this *Type/Sub-Type*. This is the search level most ETO Software™ users will use most frequently.



- Once you've picked your Entities, click *Submit* and you will arrive at the Outcomes page. Choose your Outcome from the list, *Submit*, and record your effort.

## Review Entity Efforts

(All Staff)

- This provides a viewable and printable record of all efforts that have been recorded by any ETO Software™ user for any Entity in your current Program.
- On the *Review Efforts* page, there is now a link at the top of the screen, next to the Print button to *Record New Effort* for the Entity.

## Entity Assessment

(Program Manager and Site Administrator)

- This functionality allows you to utilize assessments that your Site Administrator has created for Staff, Entities, or General Purposes.
- To begin working with an Entity on an Assessment, *Select Type of Assessment* from the list above; choose your Entity; choose to *Take New Assessment* or *Build New Assessment*; and either choose from the list of existing Assessments or build a new one.
- To continue working with an Entity on an Assessment, *Select Type of Assessment* from the list above; choose your Entity; and choose to either *Update Assessment* or view the *Assessment Report*.

## Define Entity Sub Types

(Site Administrator)

- Each of the seven Entity Types identified above may be broken into Sub Types for further clarification (Entities may have as many Sub Types as necessary). Here are some example of Sub-Types for each Entity Type:
  - *Businesses*: Strategic Partner, CBO, Current or Prospective Partner
  - *Education Institution*: Elementary School, High School
  - *Employer*: Active, Inactive, Industry/Sector
  - *Participant Funding Source*: Foundation, Corporate, Individual
  - *Individuals*: Mentors, Board Members, Tutors, Staff
  - *Referral Source*: Public Agency, CBO
  - *Service Providers*: Health, Food Assistance, Shelter
- Many of these Sub-Types populate specific drop-down boxes in the Software, as follows:



- *Education Institution:* Populates a drop-down in *Add Education History* and *Update Education History* under the *Participant History* navigation bar.
- *Employer:* Populates a drop-down in *Add Employment Record* and *Update Employment Record* under the *Participant History* navigation bar.
- *Funding Source:* Populates a drop-down in the *Add New Participant* and *View/Edit Participant* screens under the *Participants* navigation bar.
- *Referral Source:* Populates a drop-down in the *Add New Participant* and *View/Edit Participant* screens under the *Participants* navigation bar.
- *Service Providers:* Populates a drop-down in *Add Referral* and *View/Edit Referrals* under the *Record Efforts* navigation bar.

## Track Entity Processes

(All Staff)

- Processes are sets of elements whose completion is critical to an Entity's status or eligibility in some programmatic objective. The most common use for this feature is the Mentor Qualification process.
- After selecting this feature, the user chooses the Entity with whom you wish to work. The next page will contain all active and new Entity Processes created by authorized users for Entities in your program. As you work with an Entity in a specific Process and check off the "Process Elements" completed, you log the date of completion using the date picker. Clicking "Today" will set the date to the current date. Clicking "Set All Un-set Dates..." will set all dates on the current page to the date that appears in the Date Picker. If you have not yet selected a date, a dialog box will alert you to pick a date. You also have the option of adding notes relating to that completion.
- You can work with an Entity on a "New Process" or review an "Existing Process" that the Entity has already started. If it is a new process, you will find it in blue text and you can begin by clicking on the process. If it is an existing process, you will find it in the "Select" box. Once the element is completed, review of the process for that participant will show the staff responsible for recording the completion, the date, and notes if applicable.



## Navigation Component: Reports

Description: This component includes a full range of reports that focus on Site and Program Services delivered, Participant demographics, program enrollment, and employment outcomes.

### Demographics

(Program Manager and Site Administrator)

*Demographics Reports will only provide you with Basic Demographic information. Custom Demographics Reports are available (see below).*

#### ➤ Standard Demographic Reports

- **Site Demographic Report**

These site-wide, real-time reports are based on five key demographic elements: Gender, Age, Ethnicity, Zip Codes, and Marital Status. As staff populate these fields for each Participant, these reports give you the total number of clients in the Site (meaning, in all Programs); information on the number of clients included in the specific data set, and; a graphically enhanced depiction of the data in a pie chart.

- **Site Demographic Report (with date range)**

This is similar to the report above, but allows users to select a date range and review demographic information for participants enrolled within that date range.

- **Program Demographic Report**

These Program-focused, real-time reports are based on five key demographic elements: Gender, Age, Ethnicity, Zip Codes, and Marital Status. As staff populate these fields for each Participant, these reports give you the total number of clients in the specific Program (which you can choose in the left hand column); information on the number of clients included in the specific data set, and; a graphically enhanced depiction of the data in a pie chart.

- **Program Demographic Report for Active Participants**

Similar to the above report, but limited to participants who are currently active in your program.

- **Program Demographic Report for Any Participants Enrolled within a Date Range**

This is also similar to the above reports, but includes all participants who were active during the selected date range, including those who have subsequently been dismissed.

- **Group Demographic Report**

These Group-focused, real-time reports are based on five key demographic elements: Gender, Age, Ethnicity, Zip Codes, and Marital Status. As staff populate these fields for each Participant, these reports give you the total number of clients in the specific Program (which you can choose in the left hand column); information on the number of clients included in the specific data set, and; a graphically enhanced depiction of the data in a pie chart.



- **Date Demographic Report**

This functionality allows you to build reports based on Participants enrolled within user-defined date parameters. As with the two previous Demographics options, these reports give you information in both text and graphic formats.
- **Funder Demographic Report**

These Funder-focused, real-time reports are based on five key demographic elements: Gender, Age, Ethnicity, Zip Codes, and Marital Status. As staff populate these fields for each Participant, these reports give you the total number of clients in the specific Program (which you can choose in the left hand column); information on the number of clients included in the specific data set, and; a graphically enhanced depiction of the data in a pie chart.
- **Referral Source Demographic Report**

These Referral Source-focused, real-time reports are based on five key demographic elements: Gender, Age, Ethnicity, Zip Codes, and Marital Status. As staff populate these fields for each Participant, these reports give you the total number of clients in the specific Program (which you can choose in the left hand column); information on the number of clients included in the specific data set, and; a graphically enhanced depiction of the data in a pie chart.
- **Custom Demographics Reports**
  - **Custom Demographics: Site**

These real-time reports are based on the Custom Demographics created by the Site Administrator to capture information unique to the organization. As staff populate the Custom Demographics fields for Participants, these reports are populated.
  - **Custom Demographics: Program (All Programs)**

These real-time reports are based on the Custom Demographics created by the Site Administrator to capture information unique to each Program in the organization. As staff populate the Custom Demographics fields for Participants, these reports are populated.
  - **Custom Demographics: By Date (In Program Selected)**

This component allows you to create Custom Demographics reports based on Program enrollment date parameters. Simply put in a start and end date, submit, and you have a report for that date range.
  - **Custom Demographics: In My Program (Crystal Reports®)**

This report displays your Custom Demographics by Program in both text and graphic formats.
  - **Custom Demographics: In All Programs (Crystal Reports®)**

This report displays your Custom Demographics by Program, across your site in both text and graphic formats.
  - **Custom Demographics: In My Site (Crystal Reports®)**

This report displays your Custom Demographics by Site in both text and graphic formats.
  - **Custom Demographics: In My Group (Crystal Reports®)**



This report displays your Custom Demographics by Group in both text and graphic formats.

- **Custom Demographics in My Group (date range)**

This is similar to the above report, but allows users to filter for a date range.

## Entity Reports

(Program Manager and Site Administrator)

- **Entity Profile**

This report will generate an entity profile with address and contact information, along with any custom attributes.

- **Custom Attribute Reports**

- **Custom Attributes: In My Program (Crystal Reports®)**

This report displays your Custom Attributes by Program in both text and graphic formats.

- **Custom Attributes: In My Site (Crystal Reports®)**

This report displays your Custom Attributes by Site in both text and graphic formats.

- **Attributes Reports**

- **Entity Attributes: Site**

Attributes are to Entities as Custom Demographics are to Participants. This real-time report is based on the Entity Attributes created by Managers (using the Attribute Wizard under the Wizards navigation bar.) As Users Add Entities and complete the Entity Attribute fields, these reports are instantly populated.

- **Mailing List and Exportable Client/Entity Lists**

- **Avery 8160 Mailing Labels for Entities**

This function automatically creates mailing label templates for all Entities in your system. Entity addresses are broken down by those who have zip codes in the Software and those who do not. Even better, you can sort these Entities by Sub-Type in order to do more targeted mailings (e.g., mailing to "Board Members", which could be a Sub-Type of "Individuals").

- **Entity List for (Program Name)**

This component creates an Entity List that can be exported to Microsoft Excel or Word.



## Site Services Report

(Site Administrator)

- This report allows you to review – by Site for each Participant within a chosen date parameter – the *Number of Services* (e.g., distinct Outcomes), *Total Efforts* (which may include multiple provision of *services*), and *Total Time*. The report provides you with a Total and Average for each of these elements, and you can see more details by clicking on *Show Details*. This report is recommended for shorter time spans (i.e. one month or less).

## Program Services Report

(Program Manager, Department Head and Site Administrator)

- This report allows you to review – by Program for each Participant within a chosen date parameter – the *Number of Services* (e.g., distinct Outcomes), *Total Efforts* (which may include multiple provision of *services*), and *Total Time*. The report provides you with a Total and Average for each of these elements, and you can see more details by clicking on "Show Details". This report is recommended for shorter time spans (i.e. one month or less).

## Custom Reports

(All Staff)

- Social Solutions can develop additional *Custom Reports or Links* specific to your organizational or program needs. Once these reports are created, they can be found here and accessed by clicking on this component and then clicking on the name of the custom report.
- Site Administrators can also develop custom query reports using the Query Wizard, and allow their staff to have access to their reports through this link.

## Standard Reports

(Program Manager, Department Head and Site Administrator)

- **Participant Reports**
  - **Participant Face Sheet**

This functionality provides you with a different look at the demographic and contact information for each Participant. In addition, on each Face Sheet there is a link so you can "Print No. 10 Envelope" for any single Participant.
  - **Program Enrollment Report**

This report allows you to show enrollments in any of your programs by date parameters you determine. The report includes the number of Participants enrolled, successfully completing the program, and dismissed, with a pie chart representing the "Reasons for Dismissals" from the Program.
  - **Review Outcome History for Participant Report**

This report provides another view of the *Outcome History* for a Participant. The report includes *Outcome Name*, *Total Time Spent on Outcome*, and *Total*



*Number of Contacts* for each Program in which a Participant participates. The report also allows you to drill-down into the details of any Outcome.

- **Birthday List**

This report provides you with a *Birthday List by Program* that includes each Participant's *Date of Birth* and *Age*.

- **Participants Referral List**

This report provides you with a list of all Entities to which you have referred Participants in whatever date range you select. By clicking any of the Entities, you will see the names and information of those referred to that particular Entity.

- **Family Face Sheet**

Includes demographic, contact and employment information for each member of a selected family.

- **Family and Family Efforts Report**

This report shows all your work with the members of Families you've created in *Add/Edit Families* (under the *Participant* Navigation Bar).

- **Families and Their Members**

This report shows all Families in a Site, and by clicking on the Family, all Family members with "Head of Household", "DOB", and "SSN" notes.

- **Participants NOT in a Group**

This report shows all Participants NOT in a Group (by Program).

- **Participants by Group**

A list of participants listed by group, sorted by program.

- **Participant Effort Report (Case Notes Only)**

This report shows all case notes for selected participant for a specified time period.

- **Enrollments (Intakes) per Day/Week/Month**

Displays a summary of all participant enrollment information for a user-specified date range.

- **Attendance Across Outcomes**

Shows all attendance information, organized by program, participant and outcome, for any participant who has had attendance recorded during the chosen date range.

- **Drug History Report**

A list of participants with drug history details.

- **Participant Notes by Date**

- **Participant Notes by Date & Program**

- **Participant Notes by Date & Outcome**

These reports show all efforts with a selected participant, including outcome name, program name, date of contact, value and notes for each effort.

➤ **Mailing Lists and Exportable Client Lists**

- **Avery 8160 Mailing Labels for Participants**

This function automatically creates mailing label templates for all Participants in your system. Like Entities above, Participant addresses are broken down by those who have zip codes in the Software and those who do not.



- **Participant List for (Program Name)**  
This component creates a Participant List that be exported to Microsoft Excel or Word.
  
- **Employment Reports**
  - **Job Placements by Start Date (Site)**  
This report shows all Job Placements for a Site in a chosen date parameter, allowing you to view outcomes by individual Programs by clicking on them in the left column of the report.
  - **Job Placements by Start Date (Program)**  
This report shows all Job Placements for a specific Program in a Site for a chosen data parameter.
  - **Job Placements by Program Start Date (Program)**  
This report shows all Job Placements for a specific Program in a Site by a Participant's Program Start Date. In this report, your date parameter is the date range within which Participants started the Program.
  - **Job Retention (Site)**  
This report allows you to set specific date parameters and get a report on Job Retention for the Site, allowing you to view outcomes by Program by clicking on them in the left column of the report.
  - **Job Retention by Funding Source (Site)**  
This report allows you to set specific date parameters and get a report on Job Retention for the Site by Participant Funding Source, allowing you to view outcomes by Program by clicking on them in the left column of the report.
  - **Job Retention (Program)**  
This report allows you to set specific date parameters and get a report on Job Retention for a specific Program.
  - **Job Advancements (Site)**  
This report allows you to set specific date parameters and get a report on Job Advancements for the Site, allowing you to view outcomes by Program by clicking on them in the left column of the report.
  - **Job Advancements (Program)**  
This report allows you to set specific date parameters and get a report on Job Advancements for a specific Program.
  - **Labor Market Attachment Report (Site)**  
This report provides Site-wide information on how often your Participants were "attached" to the labor market within date parameters you define. This captures multiple employments during a given time period, and allows for a broader view of your organization's placement and retention efforts.
  - **Retention Summary (Site)**  
This report allows you to review by Program the 30, 60, 90, 120, 180, 270, and 365 day Employment Retention of Participants. Pick the desired date range to calculate Employment Retention.



➤ **Education Reports**

• **Education Placements (Site)**

This report shows all Education Placements for a Site in a chosen date parameter, allowing you to view outcomes by individual Programs by clicking on them in the left column of the report.

• **Education Retention (Site)**

This report allows you to set specific date parameters and get a report on Education Retention for the Site, allowing you to view outcomes by Program by clicking on them in the left column of the report.

• **Education Advancements (Site)**

This report allows you to set specific date parameters and get a report on Education Advancements for the Site, allowing you to view outcomes by Program by clicking on them in the left column of the report.

➤ **Management Reports**

• **Services (Site)**

This comprehensive report provides an overview by chosen date parameter of all services (by Outcome) provided to Participants by the Site. The report contains *Outcome Name*, *Current Outcome Value*, *Last Recorded Date*, *Number of Efforts*, and *Time Spent* for each Participant and you can drill-down further into the details of these Outcomes. In addition, there is a summary section for each Participant that includes *Number of Outcomes*, *Number of Efforts*, and *Total Time Spent on Participant*, and the last page of this report summarizes all services provided to all Participants in the chosen date range, and includes *Number of Participants Receiving Services*, *Number of Outcomes*, *Total Efforts*, and *Total Time Spent* (with *Totals* and *Average* for each).

• **Services (Site) [Details Drilldown]**

This comprehensive report provides an overview by chosen date parameter of all services (by Outcome) provided to Participants by the Site, with details on which Programs provided them. Unlike the report above, this report also includes Attendance Outcomes and other Outcomes where "time" was not recorded. The report contains *Outcome Name*, *Current Outcome Value*, *Last Recorded Date*, *Number of Efforts*, and *Time Spent* for each Participant, and a summary section that includes *Number of Outcomes*, *Number of Efforts*, and *Total Time Spent on Participant*.

• **Staff Efforts (Site)**

This comprehensive report allows you to look at each authorized user (below your authorized level) in the Software to review their Efforts towards Outcomes.

- The first page shows "Number of Efforts", "Total Time Spent", and "Discount Count of Participants/Entities/Programs" for each staff person;
- If you wish to see more detailed information, simply click on the colored bar next to the staff person's name, and you will see which Programs the person was working in when they recorded these efforts;



- By clicking on the bar in this report, you will see the Outcomes on which the staff person worked;
- The final level of detail is the Participants, Entities, or Programs with whom the staff person worked on these Outcomes, with all case notes represented.
- **Staff Efforts in a Month Report**  
This report is similar to the aforementioned report, but will allow the user to specify a date range.
- **Staff Efforts in a Month Report (Program)**  
This report filters for programs that the viewer can access.
- **Review Staff Follow-up**  
Shows each user's number of contacts, without follow-up, with follow-up, number of early follow-up contacts, late follow-up, on-time follow-up and no follow-up to date. Each user's work is broken out by program.
- **Services (Program)**  
This comprehensive report provides an overview by chosen date parameter of all services (by Outcome) provided to Participants by a Program. The report contains *Outcome Name*, *Current Outcome Value*, *Last Recorded Date*, *Number of Efforts*, and *Time Spent* for each Participant and you can drill-down further into the details of these Outcomes. In addition, there is a summary section for each Participant that includes *Number of Outcomes*, *Number of Efforts*, and *Total Time Spent on Participant*, and the last page of this report summarizes all services provided to all Participants in the chosen date range, and includes *Number of Participants Receiving Services*, *Number of Outcomes*, *Total Efforts*, and *Total Time Spent* (with *Totals* and *Average* for each).
- **Services (Program) [Details Drilldown]**  
This comprehensive report provides an overview by chosen date parameter of all services (by Outcome) provided to Participants by a Program. Unlike the report above, this report also includes Attendance Outcomes and other Outcomes where "time" (the "Effort" of ETO Software™) was not recorded. The report contains *Outcome Name*, *Current Outcome Value*, *Last Recorded Date*, *Number of Efforts*, and *Time Spent* for each Participant, and a summary section that includes *Number of Outcomes*, *Number of Efforts*, and *Total Time Spent on Participant*.
- **Site-wide Enrollment Report**  
This report shows you all "Active" (currently enrolled in your Program), "Enrolled" (enrolled within the date range you chose), and "Dismissed" (dismissed within the date range you chose) Participants in whatever date range you wish. The first page provides a basic overview of these numbers, and the following pages provide colorful bar charts with each Program and the related numbers. By clicking on any of the Program bar chart lines, a Referral Sources pie chart will appear for the Participants enrolled in the Program.



- **Login/Logout Report**  
This report shows Login's and Logout's for each staff member across your site for a selected date range. It also gives you the estimated time (in hours) each user was logged into the system and if they logged out properly.
- **Employment and Education Placement Report**
- **Employment and Education Placement Report (Program)**  
These reports show all employment and education placements within a date range, including start date, employer or education site, termination date or end date, and notes for each record. Both placement types are also summarized for the date range. Program report filters for programs available to user.

## Survey Reports

(Program Manager, Department Head and Site Administrator)

- These reports take advantage of Crystal Reports® ability to provide details in text and graphic form of responses to one or more surveys. Simply choose the Survey from the drop-down list, and the report will appear. You will note that you can click on each Survey element in the upper left column to review specific responses.

## Assessment Reports

(Program Manager, Department Head and Site Administrator)

- These reports take advantage of Crystal Reports® ability to provide details in text and graphic form of Assessments taken by Participants. Simply choose the Assessment from the drop-down list, and the report will appear. You will note that you can click on each Assessment element in the upper left column to review specific responses.

## Process Reports

(All Staff)

- This component allows you to review the information in each Process you've developed. The reports give you the number and percent of Participants who have *Completed* or *Not Completed* a particular Process element. Even better, you can click on *Show Details* to see who needs to complete a particular Process element in order to best manage each Process. Users can also scroll the mouse over the participant names that have completed the element and reveal the staff person and date of completion.
- The Date Range report is similar to the above report, but gives you the option to narrow the results by using a date range.



- Print a blank Process Report will allow you to print a blank Process, similar to print a blank Survey/Assessment.

## Housing Reports

(All Staff)

- If you are providing Shelter or Housing Services, these reports will provide you with a wealth of information, as follows:
  - **Daily Census Report**  
This report shows you all residents in your facilities in any given date range by room in each unit.
  - **Housing Reports**  
This comprehensive, HUD-styled report allows you to choose either an "Emergency Shelter Report" or "Transitional Housing Report" in whatever date range you'd like. The report includes information on bed nights available and utilized, resident demographic information, and ineligibility data, among other information.
  - **Bed Sheet Report**  
The Bed Sheet Report is roster of which residents are residing in which rooms in which units, with additional information on the capacity and utilization of each room and a summary report by unit. The summary report includes bed occupancy rate, room occupancy rate, and which rooms are available. In addition, this report builds columns for the next four days so you can use it as room attendance checklist.
  - **Bed Sheet Report (Tight Format-No Summary)**  
This Bed Sheet Report contains the same information as above except for the capacity and utilization information for each room.
  - **New Arrivals/New Dismissals Report**  
This report provides a list of all arrivals and dismissals on any date you choose.



## Navigation Component: ETO Reports

Description: This component focuses on ETO Reports, which are unique to ETO Software™, as they relate your efforts towards the achievement of Participant, Entity, and General Outcomes. They are powerful tools in capturing the incremental victories you are achieving each day and over time. We recommend using the basic ETO Reports (the first three on this list) for short-term (e.g., one week) Outcome management, and the ETO Crystal Reports® for longer-term Outcome management.

### ETO: Participant

(All Staff)

- This report allows you to review a Program's staff progress towards achievement of any Participant Outcome.
- First, choose the date from the drop-down boxes. You have the choice to *Select ALL Dates*, but an *ETO Summary* report is usually more powerful when you choose a date range (e.g., weekly or monthly).
- Next, choose the Outcome from the *Select Outcome* drop-down of predetermined choices. You will note that this is where you find the "Big Three" workforce development reports: Employment, Retention, and Advancement.
- The *ETO Summary* report shows "Program Outcome Work" within your date parameters. You can find key information in the *Summary of Efforts* section at the bottom of the report, which includes time spent on the outcome, movement towards achieving the outcome, and number of staff working on the outcome. By clicking on *Show Details* at the top of the page, you see all the *Efforts Leading to this Outcome*, by Participant, Date, Staff Member, Value Assigned, and Case Note.
- Attendance Reports are also available through this component. These reports allow you to track Participants' attendance in programs, classes, or other group events by date parameter (as mentioned earlier, there are also Attendance Reports available in the *Custom Report* section).

### ETO: Entity

(All Staff)

- This report allows you to review the progress towards achievement of any Entity outcome.
- Follow the directions for *ETO: Participant* above.

### ETO: General

(All Staff)

- This report allows you to review the progress towards achievement of any General outcome.
- Follow the directions for *ETO: Participant* above.



### **ETO: Staff**

(All Staff)

- This report allows you to review the progress of Staff (users) towards the achievement of certain outcomes (outcomes that track an increase or decrease in values, numeric values, yes/no outcomes)
- Select a Staff Name.

### **Participant ETO (Crystal Reports®)**

(All Staff)

- This report provides you with a Crystal Reports® version of your "ETO™ Summary" report (available in a different format under "ETO Participant" above). This format is "Printer Friendly."

### **Entity ETO (Crystal Reports®)**

(All Staff)

- This report provides you with a Crystal Reports® version of your "ETO™ Summary" report (available in a different format under "ETO Entity" above).



## Navigation Component: Outcomes

Description: This component focuses on the creation and management of your outcomes.

### Active Outcomes List

(Program Manager, Department Head and Site Administrator)

- This function shows you all active Outcomes in your current Program, broken down by *Standard Outcomes*, *Participant Outcomes*, *Entity Outcomes*, *General Outcomes*, and *Composite Outcomes*.

### Manage Outcomes

(Site Administrator)

- This feature provides a complete list of all Enabled and Disabled Outcomes in a Program, and allows you to adjust the Outcomes as follows:
  - *Outcome Status*: Once an Outcome is established in ETO Software™ for a particular program, it can be enabled or disabled as necessary. Disabling an outcome prevents staff from working on it but does not eliminate the data from the software. If an outcome has been disabled, you can *Enable* it so staff can work on it again.
  - *Update* Outcomes as necessary. Depending on the type of Outcome you built, you will have different options on what you can update. The most robust options occur when updating a "Values" Outcome, as you can add or disable Values at any time.
  - You also have the ability to change the sequence in which outcomes appear in the "pull down menu" when Recording and Effort. This is achieved by selecting "Re-order" and the type of outcome at the top of the Manage Outcomes screen.
  - *Outcome Sharing*: Outcomes are no longer restricted to a program. You now have the ability to "Share" and outcome across your site. To achieve this, click the "Not Shared" (in green) link which corresponds with the outcome you wish to share. If "Shared" (in red) is already indicated, the outcome is set to share. Once you have "Shared" the outcome, go into the program you wish to add the outcome to, Select the Outcomes component. Then, select the Add Existing Outcome feature. (See below for details)

### Outcome Wizard

(Program Manager, Department Head and Site Administrator)

- This is a cornerstone of ETO Software™, as you can use the *Outcome Wizard* at any time to create Outcomes for each Program.



- To create an Outcome, follow these steps (using your "Tab" key to move between the steps):
  - Step 1 – *Name and End Date*
    - Choose type of Outcome (Participant, Entity, or General)
    - Type in your *Outcome Name* (e.g., "Improve Attitude and Behavior")
    - Set *End Date* if applicable (the only time you want to use an end date is if that Outcome will go out of commission at a certain date; otherwise, all reports related to this Outcome have user-defined date parameters)
  - Step 2 – *Select Type*
    - *Numbers* – This type captures numeric values of all types, including raw number, money, and percentages. Common examples of Number Outcomes include "Track Volunteer Hours", "Improve TABE Scores", and "Increase Savings"
    - *Values* – This is most complex Outcome type, as it can demonstrate increments of progress toward an Outcome, or provide a number of choices from which to choose. Common examples of Value Outcomes include "Improve Attitude and Cooperation" (where a Participant improves along a continuum you define), "Improve Participant's Housing Situation" (where the Participant moves from "Homeless" to "Homeowner" along a series of steps).
    - *Yes/No* – This is the simplest of Outcomes, and measures the occurrence of an event or accomplishment of an objective. Common examples include "Track Attendance", "Track Contact with Participants" (the simplest type of case management tracker), and "Track Homework Completion".
    - *Time and Attendance* – This Outcome allows you to record the attendance of a participant by using a simple Boolean (yes/no) field to capture the information. Time and Attendance Outcomes can be added together to build a Composite Multi-Attendance Outcome using "Build Composite Outcome".
    - *Hours of Attendance* – This Outcome allows you to record the hours a Group of participants spend in a number of classes or activities on a chosen date. You have the option to select a default value.(See Step 3)
  - Step 3 – *Refine Outcome*
    - *Numbers* – If you chose this Outcome type, you will be asked to further refine the Outcome as *Money, Percentage, or Raw Number*. If you choose the last of these options, you can use *Show Advanced Number Features to Allow Decimal Places* (useful for "Improve GPA" –type Outcomes) and to set *Minimum and Maximum Values*.
    - *Values* – If you chose this Outcome type, you will first be asked, "Should the Values be Weighted", the answer to which is in almost every circumstance is *No* (weighted values are sometimes used in statistical applications). When you click *No*, a *Value (Text)* box will appear, and you can begin defining your Values. To move to Value #2, use your "Tab" key.



- *Yes/No* – If you chose this Outcome type, you will be asked *Does this Outcome Track Attendance*, as a special report is built for Attendance Outcomes. If you click *Yes*, you will not need to do anything in Step 4.
- *Default Value* – Only used for Hours of Attendance, this feature will allow you to set a default value (in hours) to pre-populate the Hours field when recording attendance.
- *Outcome Description* allows you to provide a brief description of the outcome. The most general use of this feature is to provide a basic description of what this outcome captures. The text you enter in the *Outcome Description* box will appear when you “mouse over” the outcome name on the *Record Efforts* screen.
- Step 4 – *Set Measurements*
  - *Enter Target Value* – Use this feature if you are trying to hit a target with the Outcome (e.g., “Increase Participant Savings to \$500”, where \$500 is your *Target Value*)
  - *Are you Measuring?* - Choose *Increase*, *Decrease*, or *Neither* to reflect how you wish to track the accomplishment of the Outcome. For example, many Value Outcomes are tracking an *Increase* along a defined continuum, while many more basic “tracking” Outcomes track *Neither* (an increase or decrease).
- Step 5 – *Set Report Choices*
  - You have the option of customizing the information you wish to see in the ETO Report that will be generated when your staff work with this Outcome.
  - For example, when you build a *Yes/No* Outcome to track Participant contacts, you can choose to see both *Yes* and *No* efforts if you wish to capture your staff’s “attempts” at contact where no contact was made (which would be capture as a *No* in the Software). There are many other choices you can make depending on the type of Outcome you built, including the *Number of Participants* with whom staff worked on the Outcome, the *Number of Staff Working on the Outcome*, and much more.
- Step 6 - *Confirm Choices and Submit*
  - This last page allows you to review the Outcome you have built. If the information is not correct, you can go back and correct it; if it is correct, click *Submit* and you will get a confirmation that your Outcome has been added to your Program.

## Add Existing Outcome

(Program Manager and Site Administrator)

**Once an Outcome is established in ETO Software™ for any particular program, it can be added to any other program within the Site using this Function. This prevents users from having to re-create the same outcome if it is in use by multiple programs. Currently, ETO Software™ comes with the following *Employment* and *Education* outcomes that can be added to your program at any time.**



➤ **Employment**

- *Employment Placements:* This outcome captures staff efforts towards helping Participants get into employment opportunities. As you know, these Employment Placements are captured in *Add Employment History* (under the *Participant History* section of the Navigation Bar), which automatically updates the goal in this outcome.
- *Employment Retention:* This outcome captures staff efforts towards helping Participants stay in employment opportunities. The goal in this outcome (number of days retained in Employment) is updated daily by the Software based on the Participants placement date.
- *Employment Advancements:* This outcome captures staff efforts towards helping Participants advance to the next employment "level". The four "levels" in ETO Software™ are *wages, status (e.g., Part-time, Full-time), Hours, and Benefits*. As you know, these Employment Advancements are captured in *Update Employment History* (under the *Participant History* section of the Navigation Bar), which automatically updates the goal in this outcome.

➤ **Education**

- *Education Placements:* This outcome captures staff efforts towards helping Participants get into education opportunities. As you know, these Education Placements are captured in *Add Education History* (under the *Participant History* section of the Navigation Bar), which automatically updates the goal in this outcome.
- *Education Retention:* This outcome captures staff efforts towards helping Participants stay in education opportunities. The goal in this outcome (number of days retained in Education) is updated daily by the Software based on the Participants placement date.
- *Education Advancements:* This outcome captures staff efforts towards helping Participants advance to the next education "level". These "levels" are defined by the customer (e.g., *Not in Education Program, GED Program, Post-Secondary Education*) and ETO Software™ captures the movement of the Participant from one level to the next. As you know, these Education Advancements are captured in *Update Education History* (under the *Participant History* section of the Navigation Bar), which automatically updates the goal in this outcome.

## Build Composite Outcome

(Program Manager, Department Head and Site Administrator)

- ETO Software™ includes the ability to group several outcomes together to create a Composite Outcome with either "Standard" Outcomes, "Time and Attendance" Outcomes, or "Hours of Attendance" Outcomes. Simply click on this function, name the Composite Outcome, choose the existing outcomes you wish to pull together, and submit. For example: If you have a number of outcomes that you work on with Participants all the time during counseling sessions, you may want



- to link these outcomes to create a Composite Outcome called Provide Counseling Sessions. When you work with a Participant through this outcome, you can identify your work (and the Participant's progress) towards each specific outcome, but record the effort as one unit.
- To build an Hours of Attendance Composite, enter a name for the Composite Outcome and click "Select only Hours of Attendance Outcomes." Click "Continue to Step 2", where all available Hours of Attendance outcomes are listed. Select the outcomes you wish to include in this Composite (in the "Available Outcomes" pane) and clicking the arrow between the "Available Outcomes" and "Linked Outcomes" panes to move the selected outcome to the "Linked" Pane. Once you have the desired outcomes in the "Linked" pane, you can reorder them using the "Move Up" and "Move Down" buttons. Click "Continue to Step 3", to review the new Composite Outcome Information. You must click "Save Linked Outcome" to save this Composite Outcome.

## **Build/Manage Service Plans**

(All Staff)

This feature facilitates creation of customizable Service Plans for individual participants. This is accomplished by linking specific outcomes in a Composite Outcome that becomes an individualized Service Plan for one specific participant.

After selecting Build/Manage Service Plans, you will be prompted to search for a participant. When your participant name is selected, the screen will show any available service plans for that participant. If there are no previously created service plans, Click on Add to create a new Service Plan. Create a name for your Service Plan; it is suggested that you include the participant's name in the name. You will be presented with a list of available Participant Outcomes to add to the Service Plan. Select the outcomes you wish to work with and move them to the selected box by clicking the single arrow button, or double clicking on the desired outcome. Clicking the double arrow button will select and move all available outcomes. You also have the option to re-order the sequence of the outcomes using the "Move Up" and "Move Down" buttons.

Click submit to save the Service Plan. You will then return to the Add Service Plan page. Use the Manage Service Plans link in blue near the top of the page to change any aspect of the Service Plan; this includes Enabling/Disabling, re-ordering, adding or removing select outcomes, and enabling/disabling the record time feature.

To Record Efforts towards a Participant's Service Plan, use the Record Efforts>Participant Efforts feature. All available service plans for the selected participant will appear at the top of the "Select Outcome" drop-down. Service Plans function in the same manner as Composite Outcomes.



## Navigation Component: Wizards

Description: ETO Software™ Wizards allow you to customize the Software for your organization in the areas of demographics, entity attributes, assessments, processes, and surveys. In addition, the Query Wizard allows you to build your own reports in ETO Software™.

### Demographics Wizard

(Site Administrator)

- New Demographic elements can be added to the *Add Participant* and *Edit Participant* screens at any time by using the Demographics Wizard.
- You have a number of options when building custom demographics, including the following demographic response choices:
  - "Site" or "Program" Specific (defined earlier)
  - "Yes/No or True/False": Provides a single check box to indicate "Yes" (checked) or "No" (unchecked).
  - "Numeric": Only use "numeric" demographics when you want sums or averages of information (e.g., "number of children"). Do not use "numeric" demographics for items like phone numbers – even though they're numbers, you should use "Arbitrary Text", as no math will be done on this element.
  - "Arbitrary Text": gives you an open text box, frequently used when the choices are too many to define
  - "Defined Text": you provide the choice and one can be chosen
  - "Non-Exclusive Text": you provide the choices and more than one can be chosen
  - "Date": the question or statement used to solicit a response and click *Continue* to add this element to your Assessment.
  - "Entity Cross Reference": the question or statement used to solicit a response; choose the *Entity Type* from the pre-populated feeder table; choose the *Entity Sub-Type* from the options you created under the *Entities* functionality; and click *Continue* to add this element to link a participant to a particular staff person, business, referral source, etc.
  - "Participant Cross Reference": the question or statement used to solicit a response and click *Continue* to add this element to link a participant to another in the Software.
  - "Header": allows you to build Section Headers similar to Section Headers in Assessments. This feature facilitates the organization of demographic elements in a user defined order. Demographic Headers show up Green in Color.



## Attribute Wizard

(Program Manager, Department Head and Site Administrator)

- Attributes are to Entities as Custom Demographics are to Participants – they are entity information unique to your Site (and perhaps your Program, if the Entities are “Program Specific, as described earlier)
- New Entity Attribute elements can be added to the *Add New Entities* or *Edit Entities* screens at any time by using the Attribute Wizard.
- You have a number of options when building custom attributes, including whether it’s “Site” or “Program” Specific, and whether it’s a “Yes/No”, “Numeric”, “Arbitrary Text”, “Defined Text”, or “Non-Exclusive Text” demographic. Note: Only use “numeric” attributes when you want sums or averages of information. Do not use “numeric” demographics for items like phone numbers – even though they’re numbers, you should use “Arbitrary Text”, as no math will be done on this element.

## Assessment Wizard

(Site Administrator)

- This functionality allows you to create Assessments for Participants, Staff, Entities, or for General purposes. In many cases, ETO Software™ customers use this functionality to replicate their paper Intake/Assessment forms in order to maintain a consistency for staff.
- To build an Assessment, simply follow these steps:
  - The **first page** contains the following elements to be completed:
    - *Assessment Name*: Assign the Assessment a name that will sufficiently represent its contents to ETO Software™ users who will be completing it.
    - *Assessment Type*: Choose from *Entity*, *General*, *Participant*, *Family* or *Staff*. HINT: Most Assessments built in ETO Software™ are Participant-focused.
    - *Assessment Response Period*: If the Assessment is intended to capture information over a definite period of time (i.e. First Quarter, 2004; November, 2003; 07/01/04 – 12/31/04) those parameters can be entered here. This is available to promote ease of cataloguing data. This field will accept any alphanumeric data elements.
    - *Assessment Header Text*: The Assessment header will be the first thing that ETO Software™ users see when they begin the Assessment. General information about the purpose of the Assessment or instructions about completing it should be included here.
    - Click on *Continue* to proceed to the second page



- The **second page** contains the following twelve *Element Types* from which to choose:
  - *Section Header*. This *Element Type* is distinct from the other eleven types, as it allows you to organize your Assessment into sections. HINT: If your intake form has sections such as "Family Information", "Housing Information", and "Health Information", and each section has multiple elements, you can create each of these as a *Section Header*, with other *Element Types* under them. Some Assessments don't have "sections", so this element might not be necessary.
  - If you're using *Section Headers*, you will come back to these elements once you've created and submitted the *Section Header*. If you're not using *Section Headers*, you can begin building out your Assessment by choosing one of the following *Element Types*:
    - *Non-Exclusive Choices*. Use this element when you can define your choices, and the user can choose more than one of these choices. HINT: "How did you hear about our services", and the respondent can choose more than one answer (e.g., "Community bulletin" and "Radio").
    - *Exclusive Choices*. Use this element when you can define your choices, and the user can choose only one of these choices. HINT: "In which neighborhood do you live?", and the respondent can choose one from among a list you've created.
    - *Arbitrary Text*. Use this element when you can't define the "universe" of choices. HINT: NEED TEXT. This should be an element of last resort, as it is always best to try to define your choices so you can ask questions of your data later. With *Arbitrary Text*, all you will know when you ask questions of your data is whether there is information in the field, but you won't know what it is unless you look at the specific record. This element allows users to type in any alphanumeric response up to 200 characters.
    - *Arbitrary Prose*. Use this element when you can't define the "universe" of choices, and the response is lengthy. HINT: "Describe the conditions in your country that caused you to come to the United States". This element allows users to type in any alphanumeric response up to 5000 characters.
    - *Percentage*. Use this element when you want to capture a percentage. HINT: "What percent of the time are you typically employed during the year?" When completing the Assessment, users will be prompted by a "%" sign next to a numeric response field.
    - *Money*. Use this element when you want to capture money-related information. HINT: "What is your annual income?" When completing the Assessment, users will be prompted by a "\$" sign next to a numeric response field.
    - *Number*. Use this element when you want to capture numeric information. HINT: "How many children do you have?" It is important to note that you should use the *Number* element when you want to "do math" on that number, such as getting an average of "Number of Children" of Participants in your Program. You should not use this



- element for items such as phone numbers, as you don't want to add up or average the numbers.
- *Boolean*: Use this element when you want to ask a "Yes/No" or "True/False" question. HINT: "Are you an Empowerment Zone resident?"
- *Date*: Use this element when you want to capture a date. HINT: "When did you last visit a doctor?" This element allows a user to use a date picker to choose the date.
- *Entity Cross Reference*: Use this element when you want to link the Assessment respondent with an *Entity* in your Software. HINT: "Who is your Mentor?", and the user chooses the Mentor from a pre-defined list of Mentors who have been added under the *Entities* Navigation Bar.
- *Participant Cross Reference*: Use this element when you want to link the Assessment Respondent with a *Participant* in your Software. HINT: "Who is your Mentor?", and the user chooses the Mentor from a list of *Participants* in the Software.
- Once you've selected the *Section Header* element (when applicable) or one of the other eleven elements, click *Continue* at the bottom of the page.
- The **third page** will look different depending on whether you chose to create a *Section Header* or one of the other eleven *Element Types*.
  - If you chose to create a *Section Header*, simply type in the header name and click *Continue*.
  - Once you've created a *Section Header* and submitted it, or if you chose one of the other *Element Types* first, you will end up at a third page that matches the *Element Type* you chose. Consistent to all third pages is the choice to *Solicit Comment*. Comments can be solicited from respondents for any question. When *Solicit Comments* is checked, the Site Administrator will be asked to add the text that clarifies the type of comments that are sought. Comment sections will contain up to 5000 alphanumeric characters and will appear immediately below the question for which comments are sought.
  - The *Element Types* that are available are the same as those covered in the **second page** information above.
- *Review this Assessment*: At any time, you can review your Assessment to see how it looks.
- *Add More Elements to this Assessment*: New Assessment elements can be added at any time. HINT: Adding new Assessment elements after Assessments have been completed may produce some data irregularities.



## Survey Wizard

(Program Manager, Department Head and Site Administrator)

- You can use the ETO Software™ Survey Wizard and the surveys you create to demonstrate your responsiveness to constituents.
- Once Surveys are created using this Wizard, the Site Administrator can issue Guest access to that component of ETO Software™ so responses can be collected online.
- Surveys also can also be printed from the interface, distributed, re-collected and entered into ETO Software™ by the appropriate staff person.
- Please remember that survey responses are anonymous by default; if you wish to capture detailed information about the respondent (e.g., name, agency, company), you must request that information in the Survey itself.
- To build a Survey, simply follow these steps:
  - The **first page** contains the following elements to be completed:
    - *Survey Name*: Assign the Survey a name that will sufficiently represent its contents to ETO Software™ users who will be completing it.
    - *Survey Response Period*: If the Survey is intended to capture information over a definite period of time (i.e. First Quarter, 2004; November, 2003; 07/01/04 – 12/31/04) those parameters can be entered here. This is available to promote ease of cataloguing data. This field will accept any alphanumeric data elements.
    - *Survey Header Text*: The Survey header will be the first thing that ETO Software™ users see when they complete the Survey. General information about the purpose of the Survey or instructions about completing it should be included here.
    - Click on *Continue* to proceed to the second page
  - The **second page** contains the following eight *Element Types* from which to choose:
    - *Section Header*: This *Element Type* is distinct from the other seven types, as it allows you to organize your Survey into sections. HINT: If your Client Satisfaction Survey has sections such as "Describe Yourself", "Services Received", and "Client Satisfaction", and each section has multiple elements, you can create each of these as a *Section Header*, with other *Element Types* under them. Some Surveys don't have "sections", so this element might not be necessary.
    - If you're using *Section Headers*, you will come back to the seven other elements once you've created and submitted the *Section Header*. If you're not using *Section Headers*, you can begin building out your Survey by choosing one of the following *Element Types*:
      - *Non-Exclusive Choices*: Use this element when you can define your choices, and the user can choose more than one of these choices. HINT:



- "How did you hear about our services?", and the respondent can choose more than one answer (e.g., "Community bulletin" and "Radio".)
- *Exclusive Choices*: Use this element when you can define your choices, and the user can choose only one of these choices. HINT: "In which neighborhood do you live?", and the respondent can choose one from among a list you've created.
  - *Arbitrary Text*: Use this element when you can't define the "universe" of choices. HINT: NEED TEXT. This should be an element of last resort, as it is always best to try to define your choices so you can ask questions of your data later. With *Arbitrary Text*, all you will know when you ask questions of your data is whether there is information in the field, but you won't know what it is unless you look at the specific record. This element allows users to type in any alphanumeric response up to 200 characters.
  - *Arbitrary Prose*: Use this element when you can't define the "universe" of choices, and the response is lengthy. HINT: "Describe the conditions in your country that caused you to come to the United States". This element allows users to type in any alphanumeric response up to 5000 characters.
  - *Percentage*: Use this element when you want to capture a percentage. HINT: "What percent of the time are you typically employed during the year?" When completing the Survey, users will be prompted by a "%" sign next to a numeric response field.
  - *Money*: Use this element when you want to capture money-related information. HINT: "What is your annual income?" When completing the Survey, users will be prompted by a "\$" sign next to a numeric response field.
  - *Number*: Use this element when you want to capture numeric information. HINT: "How many children do you have?" It is important to note that you should use the *Number* element when you want to "do math" on that number, such as getting an average of "Number of Children" of Participants in your Program. You should not use this element for items such as phone numbers, as you don't want to add up or average the numbers.
- Once you've selected the *Section Header* element (when applicable) or one of the other eleven elements, click *Continue* at the bottom of the page.
  - The **third page** will look different depending on whether you chose to create a *Section Header* or one of the other seven *Element Types*.
    - If you chose to create a *Section Header*, simply type in the header name and click *Continue*.
    - Once you've created a *Section Header* and submitted it, or if you chose one of the other *Element Types* first, you will end up at a third page that matches the *Element Type* you chose. The *Stimulus* is the question or statement that will illicit your responses on the Survey. After entering your *Stimulus*, you may need to enter values for the responses, depending on which *Element Type* you have chosen. Consistent to all third pages is the choice to *Solicit Comment*. Comments can be solicited from survey takers



- for any question. When *Solicit Comments* is checked, the Site Administrator will be asked to add the text that clarifies the type of comments that are sought. Comment sections will contain up to 5000 alphanumeric characters and will appear immediately below the question for which comments are sought.
- The *Element Types* that are available are the same as those covered in the **second page** information above.
  - *Review this Survey:* at any time, you can review your Survey to see how it looks.
  - *Add More Elements to this Survey:* New Survey elements can be added at any time. HINT: Adding new Survey elements after Surveys have been completed may produce some data irregularities.

## Process Wizard

(Program Manager, Department Head and Site Administrator)

- This functionality allows you to build Processes in ETO Software™. Processes are sets of elements whose completion is critical to a Participant's status in some programmatic objective. HINT: The most common example of this is the enrollment process for a program or organization, and ETO Software™ allows you to track the completion and submission of intake eligibility documents, identifications, and other required documents.
  
- Creating a Process is very easy using the *Process Wizard*. Simply follow these steps:
  - Functionality on the **first page**:
    - Type *Process Name*
    - Select Process Type (Either Participant or Entity)
    - *Scope:* Your Process can be *Site-Specific*, which makes it available to all Programs in your ETO Software™ Site; or *Program-Specific*, which makes it available only to the Program in which you're building the *Process*.
    - *Process Description:* This will be the first thing that ETO Software™ users see when they complete the Process. General information about the purpose of the Process or instructions about completing it should be included here.
    - Click *Continue* to proceed to page two.
  - Functionality on the **second page**:
    - *Add Section Header:* This functionality will allow you to organize your Process into sections. Simply type in your *Section Header* and click *Continue*. HINT: If your Enrollment Process has sections such as "Client Paperwork" and "Client Interviews", and each section has multiple *Process Elements*, you can create each of these as a *Section Header*, with other *Process Elements* under them. Some Processes don't have "sections", so this element might not be necessary.



- *Add Process Element:* After creating a *Section Header* (or right away, if you're not using *Section Headers*), you can create your *Process Elements* by typing in the name and clicking *Continue*.
- *Review this Process:* at any time, you can review your Process to see how it looks.
- *Add More Elements to this Process:* New Process elements can be added at any time.

## Query Wizard

(Program Manager, Department Head and Site Administrator)

A Query is any request for data from the database. By building a query, you are "asking" ETO Software™ questions of your data. The answers will be returned to you in a grid format, commonly referred to as the DB net Grid.

### ➤ Building a Query

- There are four subjects in ETO Software™ that can be queried. They are Participants, Entities, General (Program Level) and Staff. Choose only one subject and click **Continue**.
- The next step is to select Foci. A **Focus** is a group of data points. When running a **Participant** or **Entity** query, you should select **Participant Information** or **Entity Information** (respectively) as your first **Focus**. Select as many **Foci** as needed. The Query Wizard has a table limit (which varies depending on the Query you are building), and will alert you when you are reaching that limit.
  - When building a **Participant** query, you must select **Participant Mailing Information** to return address information. **Entity** queries do not have basic demographic and mailing information separated in this manner. **Entity Mailing Information** can be found under the **Entity Information** Focus.
  - Note: When selecting a Focus containing mailing information, it may take up to 3 minutes to process the ZIP Code database.
  - After selecting your **Foci**, click the Continue Button.
- The final step in building a query is to Select **Details**. You will see a screen with all data elements contained within the selected **Foci**.
  - A check in the box next to the data element name indicates that element will show up in the output (DB net Grid).
  - **Turn Filer (On/Off)** is a feature that will limit your results by using the data behind the listed detail to 'filter' for specified values.
  - **Filter Nulls (On/Off)**
    - Is Null: Filter for NO DATA in field
    - Is Not Null: Filter for ANY DATA in field.
  - **Note: Filter Nulls and Turn Filer are mutually exclusive. You only have the option to use one or the other.**



- If you select a **Detail**, but do not select a filter option, you will receive a list of all participants, even if the chosen field has no data.
  - If you want to use a filter, but do not want the Detail to show up in the results, uncheck the box after setting the filter. The Query Wizard will limit the data by every filter that is turned on, even if the box isn't checked.
  - Click the **Submit Query** button.
- Processing Query & Understanding the Results
- Upon successful execution of the Query, a dialog box will appear alerting you to how many records were returned. It will ask you if you would like to view the results.
    - If you select **No**, you will be taken back to Step 1 to rebuild the query.
    - If you select **Yes**, the DB net Grid will be displayed. All data points requested will be displayed in a Spreadsheet format.
  - Many of the **Foci** are Site Focused. You may get results that include participants from programs that you cannot access.
  - **Items appearing on the screen:**
  - Requery *button*: Takes you to an enhanced **Details** screen. You will have the option to change your details selections, column sequencing, and filter settings.
  - Reset Query *button*: Takes you to Step 1 (Select Subject)
  - Download .txt file of results: Will open a Pipe Delimited text file of results. This is useful for exporting to various Spreadsheet programs.
  - Save Query: Allows saving of query for easy retrieval.
  - Page Size *button*: Allows you to change the amount of rows displayed per page. Enter the amount of rows to be displayed in the box next to the Pg. Size button and click the button. The page will automatically refresh to the chosen size.
  - Filter Query *button*: Facilitates filtering the current DB net Grid. This is similar to filters available in Microsoft Access.
  - Navigation buttons: Use the arrows to navigate through multiple pages of the DB net Grid.
  - Save/Export *button*: Select the type of file you wish to export to. Available types are HTML, Word, Excel, and XML.
  - Print *button*: Opens a print dialog box, allowing you to send the entire DB net Grid to your printer.
  - Copy *button*: Copies the entire DB net Grid to your clipboard for pasting into another program.
  - Sort *button*: Facilitates sorting of data by column. This feature is similar to the Sort feature in Excel. You can also sort by clicking + dragging the column headers into the order you wish.



- Help *button*: This is the help feature for DB net Grid.



## Navigation Component: Administration

Description: The focus of this component is primarily program management and staff management within a program.

### Review Staff To Do

(Program Manager)

- This functionality allows managers to review their staff's *To Do Today* lists.
- Select this option and choose which staff member's *To Do Today* list you want to view.

### Review Staff Efforts

(Program Manager)

- This component allows managers to review individual staff efforts by date parameter and outcome. It is important to note that while Site Administrators can see all staff, Program Managers can only see the staff in the Program(s) they manage.
- To access staff information, choose a staff person and then use the date boxes to pick date parameters. The next screen will show you this individual staff person's work by *Outcome Name*, *Time Spent on Outcome(s)*, and *Number of Efforts*. By clicking *Show Details* on any *Outcome*, you can see all *Participant* and *Contact* information included in this *Outcome*; by then clicking on *Show Notes*, you can see the case notes related to these *Participant* efforts.

### Edit Staff Efforts

(Site Administrator)

- This function allows you to edit any of the efforts your staff have submitted in ETO Software™. This functionality is helpful if you don't want your staff to be able to edit their own efforts as described under *My Work*. Simply choose the date of the note you want to edit and all efforts for that day will appear. Click on *Edit This Record* to the right of the note, make changes, and click *Update Effort*.

### Review Staff Follow-up

(Program Manager and Site Administrator)

- This feature allows Managers to review their staff's follow-up with Participants.



## Review Outcome Efforts

(Program Manager)

- This component allows managers to review work performed on the outcomes you have defined in the Software.
- Note that all outcomes are listed on the first page, and you can get additional information by clicking on "Review Outcomes" to the right.
- If you choose this option, first set date parameters and then a report appears listing all staff who worked on this outcome (in that date range) and the time spent and number of efforts.
- By clicking on "Show Details" for any of these staff, you get all the staff person's efforts, and by then clicking on "Show Notes", you get all the case notes related to those efforts. This is a very powerful tool to help you see how effectively staff are working on key outcomes.

## View/Edit Time Sheets

(Site Administrator)

- This new feature creates time sheets for ETO Software™ users based on their work in a Program or Programs. To review a time sheet, simply choose a staff person, pick a week from the date picker, and a time sheet appears.
- The time sheet shows all Programs within which the staff person has worked, and by clicking on the "+" next to the Program, a full list of outcomes appears, with time spent in each within your week date range.
- If this information is incorrect, you can *Add* or *Edit* the record by clicking on either of these options.

## Define Program Eligibility

(Program Manager)

- This tool will allow you to set program-specific criteria for Program Eligibility based on a Participant's Demographic information.
- You are able to set "Filters" to indicate specific demographic requirements. All filter options are compiled using your program's existing standard, site-specific and program-specific custom demographics.
- You have the ability to create as many Program Eligibility Criteria Sets as needed.



- Criteria Sets are not editable and can not be deleted.

## **Eligibility for Program**

(Program Manager)

- This tool will provide you with the result set of Participants in your site who meet Program Eligibility Criteria. Simply select the desired criteria set from the drop-down and a list of participants from across the site will appear, giving you the option to enroll one, many, or all participants eligible for the currently selected program.
- If there is only one Program Eligibility criteria set built, ETO Software™ will automatically select that Program Eligibility by default and you will not be prompted to select a Criteria Set from the drop-down.
- The list of participants will include all participants in your site who meet the criteria. The list will also include information on whether the participant has been previously enrolled in your program, as well as date of birth and social security number.
- To enroll participants in your program, check the boxes next to each participant or check "Select All" to enroll all participants who are eligible for the program.



## **Navigation Component: Site Administration**

Description: This component is used by the Site Administrator to manage their ETO Software™ site.

### **Delete Fake Entities**

(Site Administrator)

- This feature allows you to delete any entities in your site with the word Fake in their name. This is a helpful tool to clean up your site after training and implementation, when Fake Entities may have been added.

### **Manage Staff Accounts**

(Site Administrator)

- This feature allows authorized Site Administrators to “manage” the list of all ETO Software™ users in roles below their own. This list now displays other users who are also Site Administrators, though Site Administrators still cannot “manage” another Site Administrator’s account. This feature contains the following functionality:
  - Add or Remove staff access from Programs, and Disable them if necessary;
  - Click on Edit to review and edit a Staff’s name, User Role, User Name, and Contact Phone and email information. This Function will also allow you to reset the password for this staff person.
  - Reset Password: Clicking here will allow the selected staff’s password to be changed.

### **Manage Site Navigation**

(Site Administrator)

- This feature allows the Site Administrator to customize which Components and Elements should appear on their site’s Navigation Bar.
- This functionality allows Site Administrators to edit and update the assessments and surveys they have created.
- Site Administrators can do the following:
  - “Survey/Assessment Status: You can “Disable” or “Activate” an Assessment or Survey and “Secure” an Assessment or Survey in a specific Program (the one you’re in when you use this functionality);



- "Review": This allows you to review, edit, and add elements to an Assessment or Survey.
- "Reorder Elements": This functionality allows you to renumber the elements in an Assessment or Survey using a simple drop-down number box.
- "Copy Assessment/Survey": This feature allows you to copy an existing Assessment or Survey and rename it.

## Manage Survey/Assessment

(Site Administrator)

- This functionality allows Site Administrators to edit and update the assessments and surveys they have created.
- Site Administrators can do the following:
  - "Survey/Assessment Status: You can "Disable" or "Activate" an Assessment or Survey and "Secure" an Assessment or Survey in a specific Program (the one you're in when you use this functionality);
  - "Review": This allows you to review, edit, and add elements to an Assessment or Survey.
  - "Reorder Elements": This functionality allows you to renumber the elements in an Assessment or Survey using a simple drop-down number box.
  - "Copy Assessment/Survey": This feature allows you to copy an existing Assessment or Survey and rename it.
  - "Delete Assessment": You can now remove an entire assessment from ETO Software™. Simply select the DELETE link next to the desired assessment.

## Manage Employment Fields

(Site Administrator)

This element allows you to add fields to an employment record similar to Custom Demographics and Attributes.

- Fields can be designated as *Required* or *Disabled*.
- Fields can be reordered in Site Specific Sequence.
- To add Employment Fields, click Add New Employment Field.
- Type a name for the new field.
- Select Type:
  - "Yes/No or True/False": Provides a single check box to indicate "Yes" (checked) or "No" (unchecked).
  - "Numeric" (Only use "numeric" fields when you want sums or averages of information (e.g., "number of employees"). Do not use "numeric" fields for items like phone numbers – even though they're numbers, you should use "Arbitrary Text", as no math will be done on this element.)
  - "Arbitrary Text" (gives you an open text box, frequently used when the choices are too many to define)



- "Defined Text" (you provide the choice and one can be chosen)
- "Non-Exclusive Text" (you provide the choices and more than one can be chosen)
- *Date: Add Date Element* (the question or statement used to solicit a response) and click *Continue* to add this element.
- *Entity Cross Reference: Entity Cross Reference Element* (the question or statement used to solicit a response); choose the *Entity Type* from the pre-populated feeder table; choose the *Entity Sub-Type* from the options you created under the *Entities* functionality; and click *Continue* to add this element to link a record to a particular staff person, business, referral source, etc.
- *Participant Cross Reference: Participant Cross Reference Element* (the question or statement used to solicit a response) and click *Continue* to add this element to link a participant to another in the Software.
- *Header*: Allows you to build Section Headers (similar to Section Headers in Assessments and Demographics). This feature facilitates the organization of demographic elements in a user defined order.

## Manage Feeder Tables

(Site Administrator)

- Feeder tables in ETO Software™ are customizable by the Site Administrator. Feeder tables are used to supply many of the drop-down or *Select* boxes in the Software. The elements of these tables can be added or edited at any time. These feeder tables include the following:
  - *Benefit Types*: Used in *Employment Records* section of *Participant History*. It is intended to be used to identify current or possible benefits that may be available to participants who may be working in a particular position. Common elements include: Full Benefits, Partial Health Benefits, and No Health Benefits.
  - *Criminal Events*: Used in *Criminal History* to identify the status of current charges.
  - *Criminal Results*: Used in *Criminal History* to indicate the results of a criminal case.
  - *Drug Test Result*: Identifies the possible responses to a drug test. Common elements include Positive, Negative, and Pending.
  - *Drug Types*: Identifies the types of substances that may be prohibited from use.
  - *Education Levels*: Used in *Education History* to establish a hierarchy of educational level that might be attained by participants. Examples of Educational Level being used in the software include: ABE, Studying for GED, Obtained GED, and Working towards AA Degree.
  - *Employment Placement Types*: Found in *Add Employment* and *Update Employment* under the *Participant History* Navigation Bar. The type identifies



- the manner in which a participant secured employment. The most common examples are "Direct Placement" and "Indirect Placement".
- *Entity Contact Locations:* Used to identify locations or types of contact with entities. Common elements include Phone, Program Office, Email, and Meeting.
  - *General Contact Locations:* Used to identify locations or types of contact for General Outcomes. Common elements include Phone, Program Office, Email, and Meeting.
  - *Legal Areas:* for ETO Software™ customers using legal functionality only.
  - *Legal Benefits:* for ETO Software™ customers using legal functionality only.
  - *Legal Contact Methods:* for ETO Software™ customers using legal functionality only.
  - *Legal Contact Types:* for ETO Software™ customers using legal functionality only.
  - *Legal Dispositions:* for ETO Software™ customers using legal functionality only.
  - *Legal Funding:* for ETO Software™ customers using legal functionality only.
  - *Legal Services:* for ETO Software™ customers using legal functionality only.
  - *Participant Contact Methods:* Used to identify locations and types of contact with participants. Common elements include Phone, Program Office, Email, and Meeting.
  - *Program Types:* Identifies the core service elements by which all your organization's programs are categorized (please note that these are not your program names). Common elements include Youth Services, Literacy Services, Employment Services, and Family Services. By defining *Program Types*, you can later create aggregate reports by these types.
  - *Reasons For Dismissal:* These are universally used reasons for dismissal from Program, Employment, and Education.
  - *Reasons for Referrals:* These apply to the "Add Referral" and "Review Referral" components under the "Participant History" navigation bar.
  - *Referral Statuses:* These apply to the *Add Referral* and *View/Edit Referrals* functionality under the *Record Efforts* navigation bar. The most common examples are "Referred", "Receiving Services", and "Denied Services".
  - *Reliable Contact Relationships:* Identifies the relationships of reliable or emergency contacts for Participants. The most common examples include "Parent", "Guardian", "Social Worker", and "Probation Officer".
  - *Treatment Types:* Applies to substance abuse treatment options. Common elements include 28-day, Residential, and Outpatient.
- When applicable, all categories in each feeder table can be customized to be Program Specific, Education Specific, Employment Specific and Referral Rejection Specific. To change the Program scope of any category, click Edit next to the Feeder Table name and click Scope next to the desired choice.



## Manage Demographics

(Site Administrator)

- This component allows you to set which Standard or Custom Demographics items are "required". This means that the field (noted in yellow) must be filled out prior to adding a Participant. This component also allows the Site Administrator to "Disable" demographic fields that your Site or Program is not interested in tracking.
- This component also allows you to reorder elements in any existing *Custom Demographics* at the Site and Program levels. Towards the bottom of the page, you will see all your *Site Specific* and *Program Specific Custom Demographics* in their current order. If you wish to change this order, click on either *Site Specific Sequence* or *Program Specific Sequence* and you can change the order of the Custom Demographics and *Submit* the new sequence.

## Manage Attributes

(Site Administrator)

- This component allows you to set which Entity Attributes (essentially demographics for Entities) are "required". This means that the field (noted in yellow) must be filled out prior to adding an Entity. This component also allows the Site Administrator to "Disable" Entity Attribute fields that your Site or Program is not interested in tracking.

## Manage Processes

(Site Administrator)

- This functionality allows approved users to edit and update the processes they have created.

## Manage Programs

(Site Administrator)

- This new feature replaces the "Add New Program" and "Edit Program" features previously in ETO Software™.
- If you wish to "Add New Program":
  - Click on the blue "Add New Program" link at the top of the page;
  - In the next page, you will be asked to name the "Program"; identify the "Program Type" from a drop-down box (e.g., Youth Services); if you tag the Program as "Confidential", it will remove all references to the Program when running Site Level Reports. Select a Program Manager from your list of



current staff. You may assign other Program Managers under the "Manage Staff" functionality described above.

- Please remember that each Program contains distinct staff and outcomes, and may contain distinct demographics and processes. Given this, you may have to do the following:
  - Add *Staff* to the Program
  - Create new *Outcomes* or *Add Existing Outcomes*
  - Identify and add *Custom Demographics*
- If you wish to "Edit Program":
  - Click on the blue "Update" in the far right column;
  - The next page allows you to revise the key elements of the Program, including "Program Name", "Program Type", "Program Status" (e.g., "Enabled" or "Disabled"), "Confidentiality", "Auto Dismissal" availability, and "Address";
  - You also can update "Program Status" and "Confidentiality" options directly on the first page without going through the "Update" link.

## Manage Queries

(Site Administrator)

Managing queries uses the standard ETO Software™ management template. All saved queries will be displayed on this screen.

- What you see on the screen:
  - Query Name *column header*: The information you see in this column includes the name the query was saved as and a description of the query (if provided at time of save).
  - Created By *column header*: The name of the staff person who created the query.
  - Status *column header*: Is this query **Enabled** or **Disabled**? To change the status, simply click the status. The current status is displayed in the column.
  - Restricted/Shared (change) *link*: Click **Change** to either Restrict or Share the Query Report. If you choose to Share the report, you will be prompted to complete the following information:
    - Shared *checkbox*: Click this to share the Query Report
    - Lowest Role Viewable *drop-down menu*: Indicate who (by user role) will have access to this report. When you select a user role, all users with the selected role or higher will have access to this report.
    - Restrict View to Program *drop-down menu*: Restrict this report to a single program.
    - Click Submit to save changes.
  - Update *link*: Change the Title and Description of the Saved Query Report.



- Edit *link*: Adjust filter settings. You also have the option to reorder output column sequence.
- Delete *link*: Deletes the specified query.

## **Merge Duplicates**

(Site Administrator)

- This feature allows the Site Administrator to identify similar participants, designate one as the master (the demographic information of the master will be saved) and then merge all records associated with both participants into one participant.

## **Merge Entities**

(Site Administrator)

- This feature is the "Merge Duplicates" for entities. It allows you to merge two similar or duplicate entities into one "Master."

## **Delete FAKES...**

(Site Administrator)

- This feature will allow you to delete any participants with either the first or last name of "Fake." This is a helpful way to delete any "Fake" or "Test" participants which may have been used during Implementation/Training.

## **Add Existing CxDemo**

(Site Administrator)

- This feature allows you to add a Program-specific Custom Demographic created in another Program to your Program.
- Simply choose from the list and click "Add this Custom Demographic" and it will exist in your Program.

## **Review Repository**

(Site Administrator)

- Periodically, Social Solutions will populate the Repository with Outcomes, Processes, Surveys, and other "best practice" elements for the exclusive use of ETO Software™ customers. You will be able to select any of these items from the Repository and incorporate them into your own program. For example, if



you're interested in developing an Enrollment Process, you may be able to find one in the Repository that fits your needs.

## Batch Upload

(Site Administrator)

- This feature allows you to upload your own participant demographic data.
- Uploads must be in Comma delimited (\*.csv) format.
- Include a "Header" row of Element names (e.g. First Name, Last Name, Address 1, Address 2, etc.) All Element names must exactly match the demographic or custom demographic name. You must include a column titled **Program** and another titled **Start Date** for the participant to be successfully uploaded and enrolled in your program.
- To add dismissed participants, you can include a column labeled End Date.
- There is a limit of 25 columns.
- This feature will require some assistance from our Customer Support Team. Please contact Customer Support (contact information on page 2) for a "Walk-through" of this feature. This should take about 15 minutes.

## Manage Criminal Charges

(Site Administrator)

- If you are using the "Criminal Record" functionality under the *Participant History* navigation bar, this will allow you to create criminal charges under existing "Criminal Charge Types" that fit your programming.
- For example, under the "Misdemeanor Offense", "Criminal Charge Type", you can create "Drug Charge".

## Manage Employment Fields

(Site Administrator)

- This functionality allows Site Administrators to manage the custom employment fields for Employment Records.
- When you click on *Add New Employment Field*, the next screen is where you enter the Field Name and Field Type.



- There are 10 choices for Field Type.
  - *Yes/No or True/False*: This provides a single check box to indicate “Yes/True” (checked) or “No/False” (unchecked).
  - *Numeric*: Only use Numeric when the response will be used to create averages or sums of the information. Do not use Numeric for arbitrary numbers such as phone numbers, as they will not be used for mathematical functions.
  - *Arbitrary Text*: This gives you an open text box where you can enter a small amount of text.
  - *Defined Text Values*: You provide the values for this and only one can be selected at a time.
  - *Non-Exclusive Text Values*: You provide the values for this and more than one can be selected.
  - *Date*: This will give you a date picker.
  - *Arbitrary Text Area*: This is similar to *Arbitrary Text*, but allows more room for responses that require more detailed information.
  - *Entity Cross-Reference*: Choose the *Entity Type* from the pre-populated feeder table; choose the *Entity Sub-Type* from the options you created under the *Entities* functionality. This will give you a drop down box with all the entities within the type that you choose for this field. It allows you to link the participant’s employment with a particular business, referral source, etc.
  - *Participant Cross-Reference*: This allows you to link the participant you are working with to another participant in the program. On the Add Employment Record screen, it will give you a link to search for a participant and insert their name into the employment record. If you would like to link more than one participant, you must add additional fields.
  - *Header*: This facilitates the organization of the custom employment fields. It will appear in Green under the Custom Employment Fields section of the Add Employment Record screen.
  
- After adding new employment fields, you may change the order that they will appear on the Add Employment Record screen by clicking Site-Specific Sequence. By clicking on a field and choosing “move up” or “move down” and then submit, you will change the sequence.
  
- On the main screen of Manage Employment Fields, you may also edit the name of a field by clicking on the name in blue, and you can edit the responses of fields that are user-defined by clicking “edit”. You are also able to make the fields “required” or “disable” the fields so that they will not appear in Add Employment Record.

## Manage Processes

(Site Administrator)



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- This functionality allows approved users to edit and update the processes they have created.
- When you select this feature, you will be prompted to choose either Entity or Participant Processes.
- After selecting the appropriate Process type, you will see a list of available Processes of that type.
- What you see:
  - Add a New Process using the Process Wizard – shortcut link to the Process Wizard
  - Add Existing Process from other Programs – Allows you to add processes from any available program (across your site) to your program
  - Track Entity Processes or Track Participant Processes – Shortcut link to track Processes for either Entities or Participants.
  - Disable – Allows you to disable the Process. This feature will not delete the process from the software. All data contained in the process will still be available in reports.
  - Edit – Allows you to change, remove, or add elements to this Process.
  - Make a Copy – Make an exact duplicate of this Process.
  - Reorder – Reorder elements in the Process using the Move Up/Move Down functionality.
  - View Report – Generates an aggregate report for the process.