HIPPYUSA®
Home Instruction for Parents of Preschool Youngsters

ETO Reports and Data Analysis Quick Reference

The following four primary steps, and subsequent general tips, are used to generate and setup all HIPPY reports for analysis:

Generate Report (Video Demo)

1. Navigate to the ETO dashboard
2. Click **Reports** > **HIPPY Custom Reports**, then select report.
3. If necessary, change begin and end dates for report.

Export Report to Excel (Video Demo)

1. Click the **Export** button in the menu bar.
2. Select the Excel file type corresponding to your version of Excel (*.xlsx = Excel 2007 or higher).
3. Select the "Open file…" option and click **OK**.

Create Data Filters in Excel (Video Demo)

1. Select the **Data** tab at the top of the screen.
2. Click on the number of the row (leftmost side of the screen) containing the reports column headings. (Family Management Report = Row 4 of the DataQuality tab.)
3. Click the **Filter** button in the data menu bar.

Filter & Sort Rows in Excel (Video Demo)

1. Click the down arrow in the column heading corresponding to your filter or sort criteria. (In row 6 in Figure 1.)
2. **To sort**, select one of the first two options in the menu.
3. **To filter**, click **Filter by Color** to filter according to the color scheme identified in the report header.
4. Click the down arrow and select **Clear Filter** when finished.

Note: Refer to the HIPPY USA ETO Data Entry Guide (ETO Help Menu or ETO Dashboard as seen below) for additional data entry details.

SUPPORT INFORMATION
1st: Consult the HIPPY USA ETO Data Entry Guide (revised 9/1/16) for instructions on entering data.
2nd: Contact SSG support at 866.732.3560, ext. 2 for additional assistance.
3rd: If SSG is unable to resolve your issue, please forward your SSG case number to (data@hippyusa.org) for further support.

General Tips

To locate a participant in ETO (Option 1):

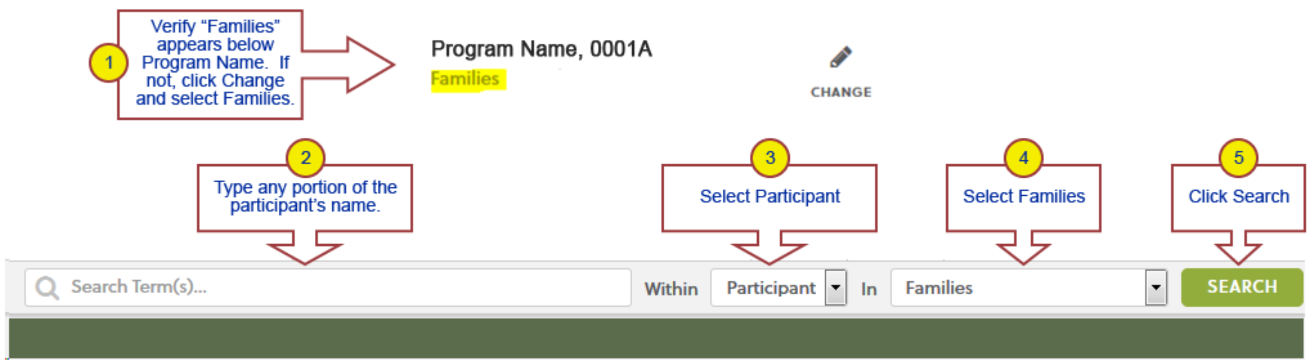


Figure 1

Option 1 Tips:

- <u>To retrieve a list of all participants</u>, leave the search term field blank then select "**Participant**" from the "**within**" dropdown list and click **Search**.
- <u>To retrieve a list of all families</u>, leave the search term field blank then select "**Families**" from the "**within**" dropdown list and click **Search**. Please note that when you select "**Families**", you will see your program name appear in the second dropdown field, as follows:

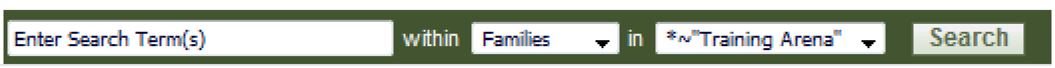


Figure 2

To locate a participant in ETO (Option 2):

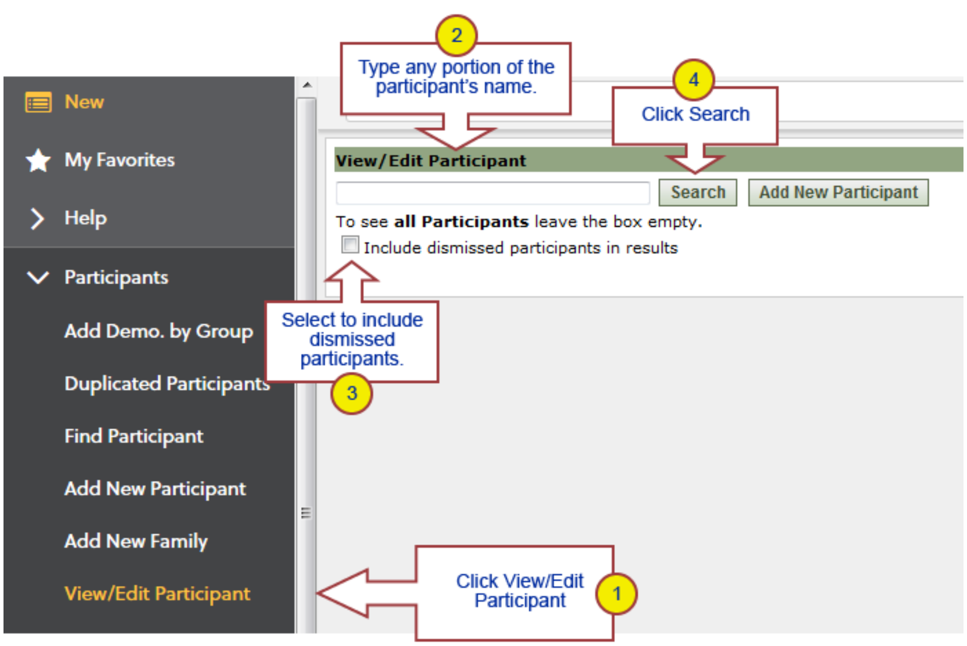


Figure 3

To Analyze Excel Data and Make Corrections in ETO

Overarching steps to analyze all error conditions in all reports:

1. The first step is to identify the error condition on the **Aggregate** tab. In this Family Management Report example, the **Aggregate** tab (Figure 4) identifies the types of errors, while the **DataQuality** tab (Figure 5) identifies the participants associated with each error flag. In most cases, you will need to filter and sort the **DataQuality** tab to locate the participants related to the error, then return to ETO, locate the same participant or family entity, and resolve the error.
2. Resolve the situation based upon the error condition. Specific error condition instructions are listed below.
3. It is recommended that you work your way through the reports in the order they are listed from this point forward. A majority of your efforts will involve the Family Management and Application Information Reports.

Family Management Report Analysis

Family Management Report Aggregate Tab

Active Child NOT In Family	Active Child NOT In Family	Active Parent NOT In Family	Active Parent NOT In Family	Enabled Family Without an Active Adult	Enabled Family Without an Active Child	Potential Duplicate Family	Multi-Family Participant	Active Participants in Disabled Families	Family Relations Not Selected	HOF Not ACTIVE Parent Families
11	13.4%	10	12.8%	2	2		1			2
				3	1	2	10	1		

Figure 4 (Family Management Report Aggregate tab)

Use this legend to associate a Family Management Report error condition with a specific column:

The following graphic has been reformatted to illustrate how the colors in the upper-left corner reflect the available filter colors in each column. Note that the column headers shown in row 6 do not normally appear in color.

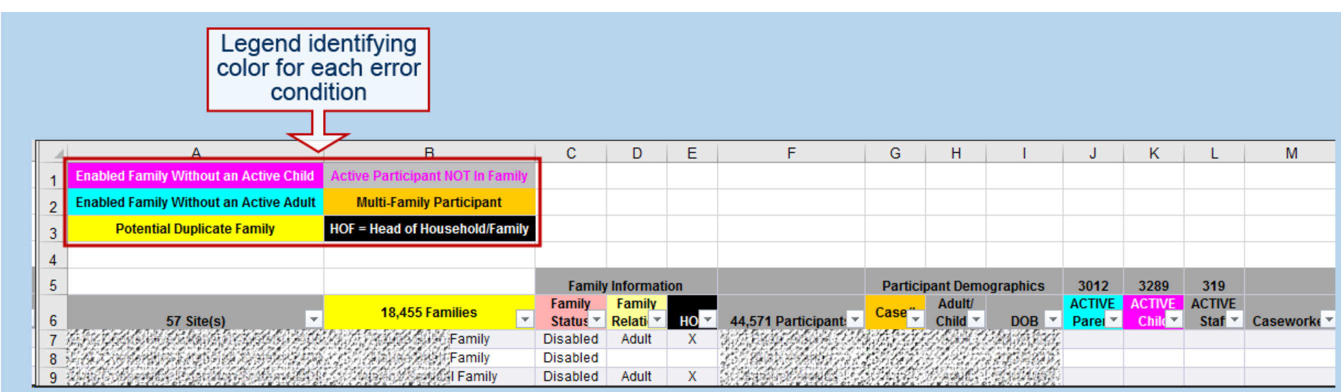
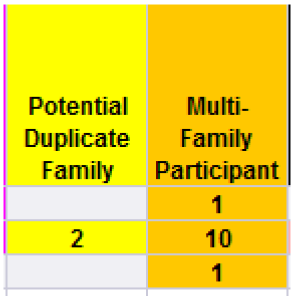


Figure 5 (Family Management Report DataQuality tab)



1. If **“Potential Duplicate Family” or “Multi-Family Participant”**

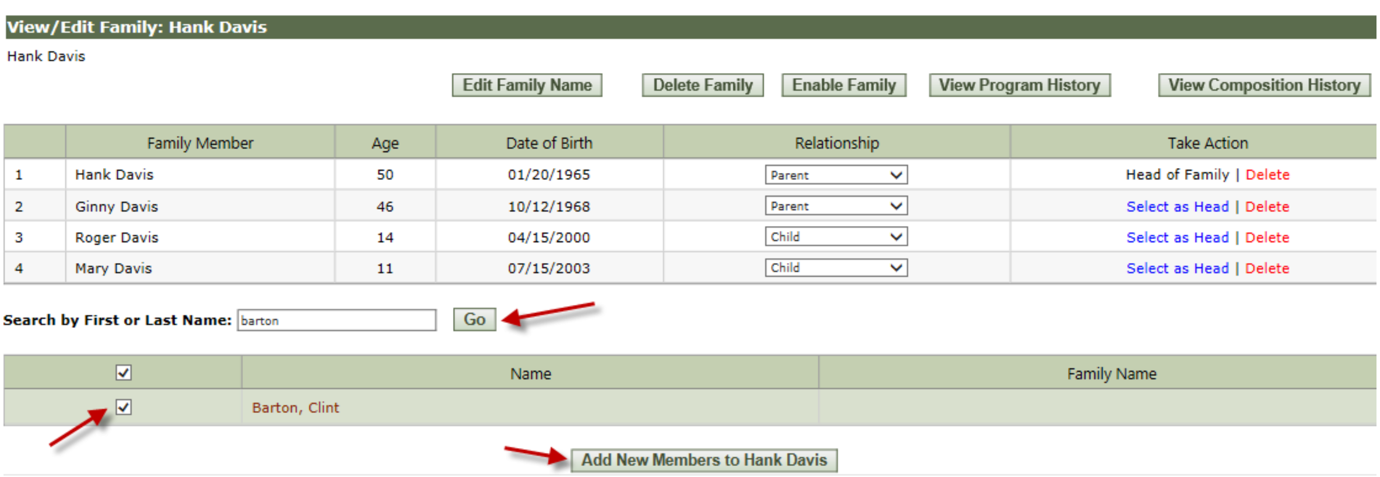
   These conditions occur if the same participant (i.e., same case ID) exists in two separate family entities or if there are duplicate participants with unique case ID’s.

   If the participants have different case IDs, as seen in the Family Management Report, and you know for certain that the two listings are for the same person, then use the Duplicate Participants feature in the Participant Menu to merge the two records (see below), otherwise do the following:

Note: Multi Family Participant & Potential Duplicate Family errors on the Family Management Report should be resolved as a first priority.

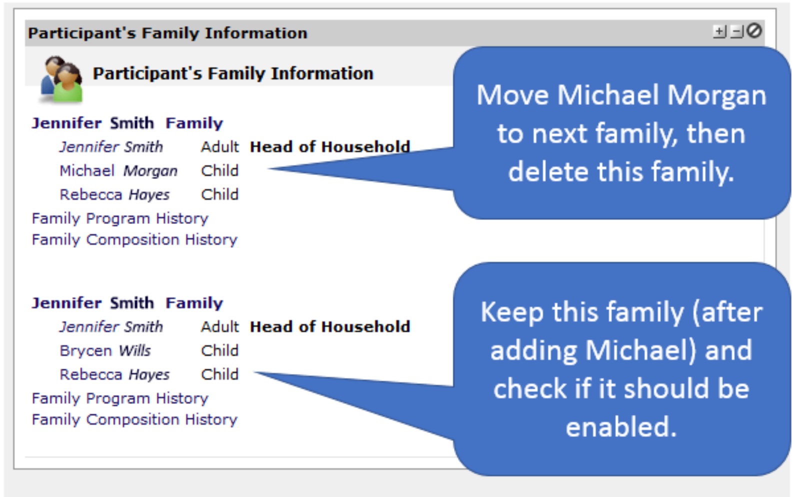
a. Look for multiple family entities on the adult participants dashboard (use view/edit participant).
b. Determine which family group is accurate and that has the ACTIVE parent you want to keep.
c. Assign all participants (i.e., family members) to the family you wish to keep and be sure that all participants are accounted for in the new family and that has the correct enrollment status. Start by clicking “Search for Others…” (ETO Help Instructions) on the View/Edit Family screen.

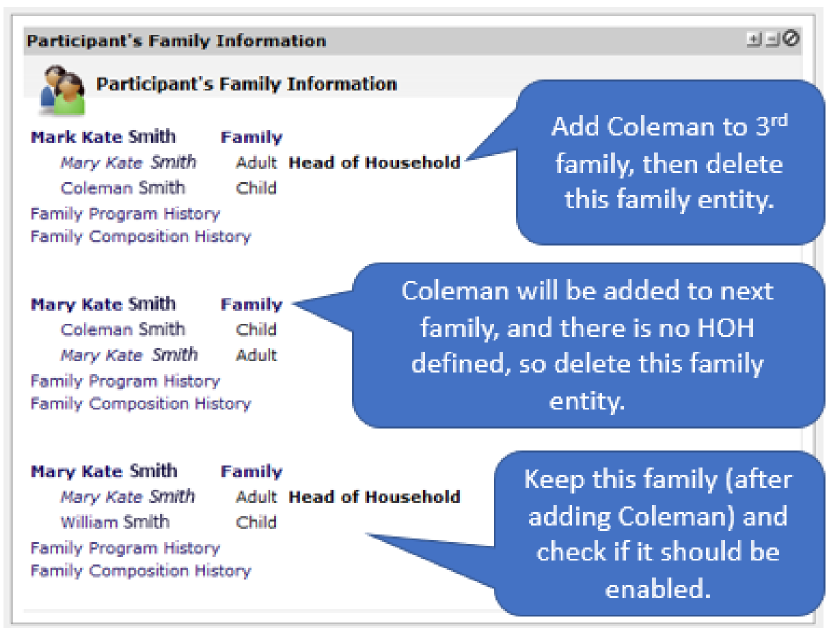
d. Search for the missing participant and add to the family, as seen below. Be sure to identify the relationship of child or adult.



e. Return to the participant dashboard, verify the addition, then **delete the duplicate family** that you no longer wish to keep. Deleting a family entity **will not** delete touchpoint information associated with the participants.

Examples:

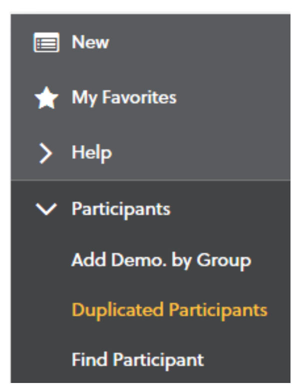




2. If **"Potential Duplicate Participant"**

If you have potential duplicate participants then use the Duplicate Participants feature **(ETO Help Instructions)** to merge two participant records together into a single record.

a. Demographics data will be preserved in the Master record but deleted from the duplicate record.
b. If both records are currently active in the same program with different start dates, the earlier start date will be kept.
c. Make sure no one else is modifying the record when merging duplicates, as their changes will be lost.
d. Begin the process by clicking the Duplicate Participants menu option, then follow the instructions identified in the ETO Help Instructions link above.



Active Child NOT In Family	Active Child NOT In Family	Active Parent NOT In Family	Active Parent NOT In Family	Enabled Family Without an Active Adult	Enabled Family Without an Active Child	Potential Duplicate Family	Multi-Family Participant	Active Participants in Disabled Families	Family Relations Not Selected	HOF Not ACTIVE Parent Families
11	13.4%	10	12.8%	2	2		1			2
				3	1	2	10	1		

Active Child NOT In Family	Active Parent NOT In Family
7.1%	1

4. If **"Active Participant Not in Family"**

   a. Click View/Edit Families from the Participant panel on the left.
   b. Click View Participants Not Currently in a Family
   c. Locate the adult family member and click their name. Always start with the adult in the family, rather than the child, as a new Family Entity will be created when you click the name in the list, and you always want the Family Name to reflect the adults name.
   d. If the child is also listed as an Active Child NOT in Family then assign the child to the family by clicking "Search for Others…", type any part of the child's name, then click Go. Select the child and click the "Assign to…" button.
   e. Be sure to identify the Adult/Child status of each family member before exiting the screen.
   f. You may click a family members name to then navigate to their dashboard to make further adjustments, such as identifying enrollment status.

Enabled Family Without an Active Adult
2
3

5. If **"Enabled Family without an Active Adult"**

   a. Locate adult participant and, if needed, add to correct family.
   b. Determine if adult was correctly dismissed or needs to be enrolled.
   c. Determine if remaining family participants should also be dismissed.

Enabled Family Without an Active Child
2
1

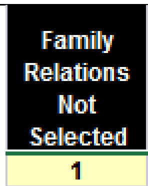
6. If **"Enabled Family without an Active Child"**

   a. Locate adult participant and, if needed, add to correct family.
   b. Determine if all children in family were correctly dismissed or need to be enrolled.
   c. Determine if remaining adult participant should also be dismissed.

Active Participants in Disabled Families
1

7. If **"Active Participants in Disabled Family"**

   a. Locate participant.
   b. Determine if participant should still be enrolled.
   c. Scroll down and enable the family entity.

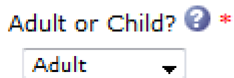


8. If **“Enabled Family Relations Not Selected”**

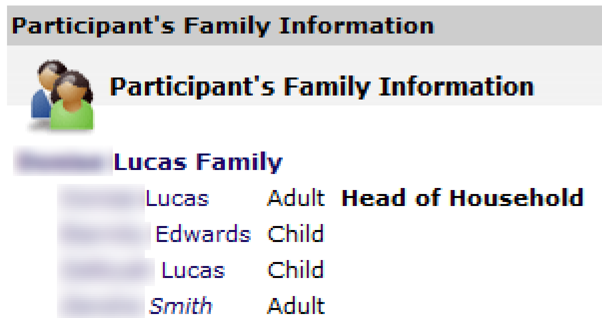
   a. Locate participant and determine the participant’s family relationship, “Adult” or “Child”.

   b. Determine if participant’s relationship was correctly selected in the following pages:

      i. Participant’s Information page

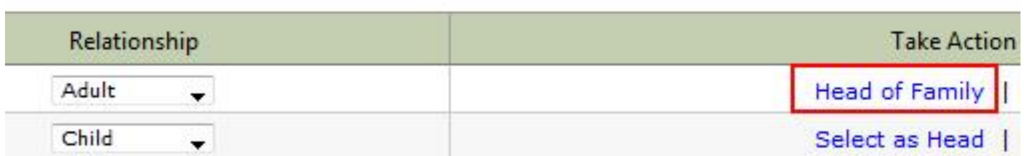


      ii. Participant’s Family Information page.



   a. Edit and Select the appropriate family relation.

Please note, for the Family Information page, **Head of Family** should also be determined and selected for the appropriate adult.



9. If **“HOF Not ACTIVE Parent Families”**

   a. Locate participant.

   b. Determine if participant is correctly Dismissed.

   c. Disable the family entity.

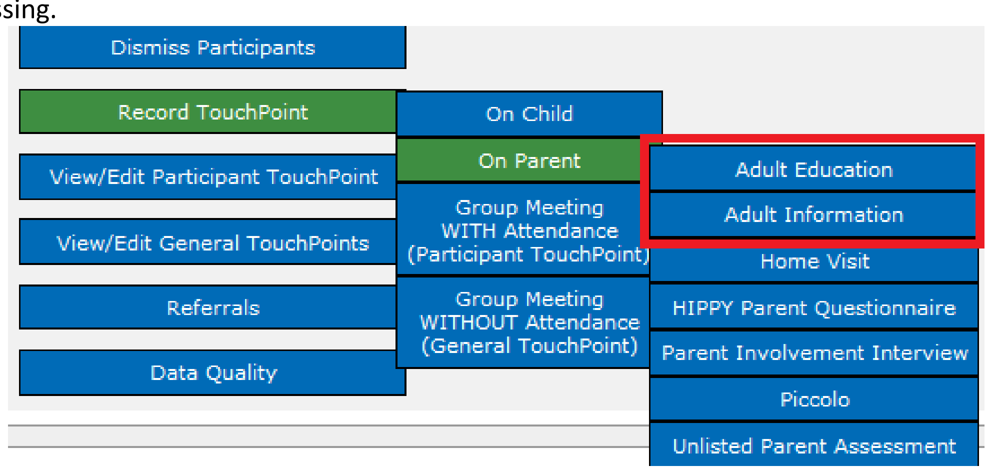
Application Information Report Analysis

1. The application information report shows where participant touchpoint information is old or missing. Records are highlighted based upon how much time has passed between the participant enrollment date and the touchpoint. As mentioned on the **ReportInfo** tab, new touchpoints are required for each curriculum year, even if the participant has already been dismissed from the program. Entering this information is necessary to establish a more accurate picture of the communities we serve.

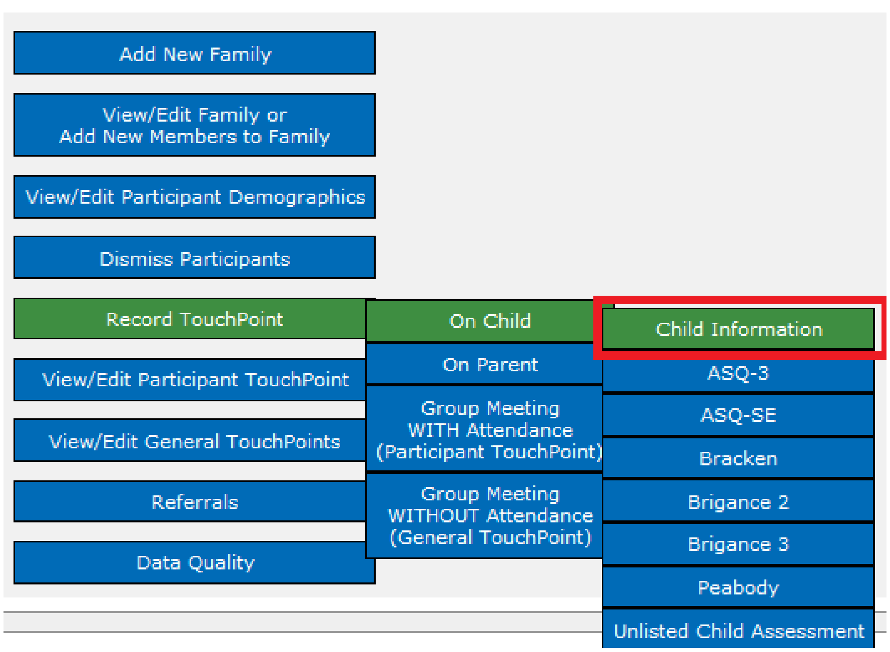
2. To determine which data is old or missing, navigate to the **QualityControl** tab. Records requiring your attention are highlighted using the same color codes as seen on the **Aggregate** tab. The column headings identify the type of touchpoint requiring your attention.

3. For each highlighted row, open the corresponding participant's dashboard and record whichever touchpoint is needed. **Be sure to read the TouchPoint Data Entry Tips on the ReportInfo tab.**

   a. For example, if the cells in the **Adult Ed** or **Adult Info TP Last Updated** columns are highlighted then record the required touchpoint as seen below. Note: A highlighted **Demo(s)** column indicates that data in a required field on the participant profile screen (i.e., participant language, race, etc.) is missing.



   b. Likewise, select **Record TouchPoint** > **On Child** if the cell in the **Child Info TP** column is highlighted.



Home Visit Report Analysis

1. Look at sequence of packets delivered and time spent at a home to check for odd amounts of time, such as 600 minutes. Generally, these are due to inaccurate AM/PM entries. Remember, 12:00 AM is midnight, and 12:00 PM is noon.
2. Adjust the touchpoint activity start and end times in ETO accordingly.

Program and Funding, Professional Development, Group Meeting and Staff Background Report Analysis

1. Check reports for completion.

TouchPoint Response Report Analysis

1. Run Child Assessments (Bracken, ASQ, etc.) and Parent Assessments (HIPPY Parent Involvement Interview) to check for completion.