



## 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](mailto:data@hippyusa.org) for further support.

## General Tips

### To locate a participant in ETO (Option 1):

1 Verify "Families" appears below Program Name. If not, click Change and select Families.

2 Type any portion of the participant's name.

3 Select Participant

4 Select Families

5 Click Search

Program Name, 0001A  
Families

CHANGE

Search Term(s)...

Within Participant In Families

SEARCH

Figure 1

### Option 1 Tips:

- To retrieve a list of all participants, leave the search term field blank then select **"Participant"** from the **"within"** dropdown list and click **Search**.
- To retrieve a list of all families, 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:

Enter Search Term(s)

within Families in \*~"Training Arena"

Search

Figure 2

### To locate a participant in ETO (Option 2):

2 Type any portion of the participant's name.

4 Click Search

3 Select to include dismissed participants.

1 Click View/Edit Participant

New

My Favorites

Help

Participants

Add Demo. by Group

Duplicated Participants

Find Participant

Add New Participant

Add New Family

View/Edit Participant

View/Edit Participant

Search

Add New Participant

To see all Participants leave the box empty.

☐ Include dismissed participants in results

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.

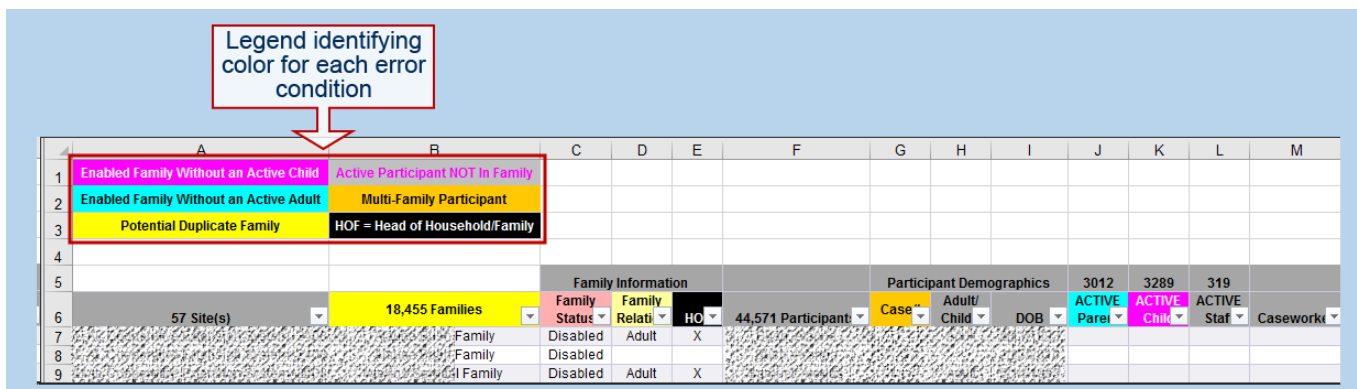


Figure 5 (Family Management Report DataQuality tab)

Potential Duplicate Family	Multi-Family Participant
	1
2	10
	1

### 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.

- Look for multiple family entities on the adult participants dashboard (use view/edit participant).
- Determine which family group is accurate and that has the ACTIVE parent you want to keep.
- 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.

Date of Birth	Relationship	Take Action
09/26/1971	Adult	Head of Family   Delete
11/23/2006	Child	Select as Head   Delete

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

**View/Edit Family: Hank Davis**  
 Hank Davis

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Hank Davis	50	01/20/1965	Parent	Head of Family   Delete
2	Ginny Davis	46	10/12/1968	Parent	Select as Head   Delete
3	Roger Davis	14	04/15/2000	Child	Select as Head   Delete
4	Mary Davis	11	07/15/2003	Child	Select as Head   Delete

Search by First or Last Name:

<input checked="" type="checkbox"/>	Name	Family Name
<input checked="" type="checkbox"/>	Barton, Clint	

- 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:

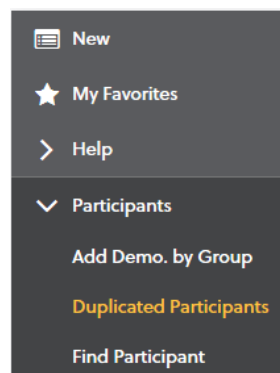
The first screenshot shows a window titled 'Participant's Family Information' with a family entry for Jennifer Smith. The family members are Jennifer Smith (Adult, Head of Household), Michael Morgan (Child), and Rebecca Hayes (Child). A callout box points to Michael Morgan with the text: 'Move Michael Morgan to next family, then delete this family.' Below this is another family entry for Jennifer Smith with members Jennifer Smith (Adult, Head of Household), Brycen Wills (Child), and Rebecca Hayes (Child). A callout box points to this family with the text: 'Keep this family (after adding Michael) and check if it should be enabled.'

The second screenshot shows the same window with three family entries. The first is Mark Kate Smith (Family) with members Mary Kate Smith (Adult, Head of Household) and Coleman Smith (Child). A callout box points to Coleman Smith with the text: 'Add Coleman to 3<sup>rd</sup> family, then delete this family entity.' The second entry is Mary Kate Smith (Family) with members Coleman Smith (Child) and Mary Kate Smith (Adult). A callout box points to this family with the text: 'Coleman will be added to next family, and there is no HOH defined, so delete this family entity.' The third entry is Mary Kate Smith (Family) with members Mary Kate Smith (Adult, Head of Household) and William Smith (Child). A callout box points to this family with the text: 'Keep this family (after adding Coleman) and check if it should be enabled.'




## 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.

- Demographics data will be preserved in the Master record but deleted from the duplicate record.
- If both records are currently active in the same program with different start dates, the earlier start date will be kept.
- Make sure no one else is modifying the record when merging duplicates, as their changes will be lost.
- 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		

<table><tr><td>Active Child NOT In Family</td><td>Active Parent NOT In Family</td></tr><tr><td>7.1%</td><td>1</td></tr></table>	Active Child NOT In Family	Active Parent NOT In Family	7.1%	1	<p>4. If “Active Participant Not in Family”</p> <p>a. Click View/Edit Families from the Participant panel on the left.</p> <p>b. Click <span>View Participants Not Currently in a Family</span></p> <p>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.</p> <p>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.</p> <p>e. Be sure to identify the Adult/Child status of each family member before exiting the screen.</p> <p>f. You may click a family members name to then navigate to their dashboard to make further adjustments, such as identifying enrollment status.</p>
Active Child NOT In Family	Active Parent NOT In Family				
7.1%	1				
<table><tr><td>Enabled Family Without an Active Adult</td></tr><tr><td>2</td></tr><tr><td>3</td></tr></table>	Enabled Family Without an Active Adult	2	3	<p>5. If “Enabled Family without an Active Adult”</p> <p>a. Locate adult participant and, if needed, add to correct family.</p> <p>b. Determine if adult was correctly dismissed or needs to be enrolled.</p> <p>c. Determine if remaining family participants should also be dismissed.</p>	
Enabled Family Without an Active Adult					
2					
3					
<table><tr><td>Enabled Family Without an Active Child</td></tr><tr><td>2</td></tr><tr><td>1</td></tr></table>	Enabled Family Without an Active Child	2	1	<p>6. If “Enabled Family without an Active Child”</p> <p>a. Locate adult participant and, if needed, add to correct family.</p> <p>b. Determine if all children in family were correctly dismissed or need to be enrolled.</p> <p>c. Determine if remaining adult participant should also be dismissed.</p>	
Enabled Family Without an Active Child					
2					
1					
<table><tr><td>Active Participants in Disabled Families</td></tr><tr><td>1</td></tr></table>	Active Participants in Disabled Families	1	<p>7. If “Active Participants in Disabled Family”</p> <p>a. Locate participant.</p> <p>b. Determine if participant should still be enrolled.</p> <p>c. Scroll down and enable the family entity.</p> <div></div>		
Active Participants in Disabled Families					
1					

**Family  
Relations  
Not  
Selected**

**1**

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

Adult or Child? ? \*

Adult ▼

- ii. Participant’s Family Information page.

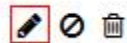
**Participant's Family Information**

**Participant's Family Information**

**Lucas Family**

Lucas	Adult	<b>Head of Household</b>
Edwards	Child	
Lucas	Child	
Smith	Adult	

- a. Edit and Select the appropriate family relation.



**Relationship**

Adult ▼

Child ▼

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

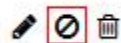
Relationship	Take Action
Adult ▼	<b>Head of Family</b>
Child ▼	Select as Head

**HOF Not  
ACTIVE  
Parent  
Families**

**2**

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.

Dismiss Participants		
Record TouchPoint	On Child	
View/Edit Participant TouchPoint	On Parent	Adult Education
View/Edit General TouchPoints	Group Meeting WITH Attendance (Participant TouchPoint)	Adult Information
Referrals	Group Meeting WITHOUT Attendance (General TouchPoint)	Home Visit
Data Quality		HIPPY Parent Questionnaire
		Parent Involvement Interview
		Piccolo
		Unlisted Parent Assessment

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

Add New Family		
View/Edit Family or Add New Members to Family		
View/Edit Participant Demographics		
Dismiss Participants		
Record TouchPoint	On Child	Child Information
View/Edit Participant TouchPoint	On Parent	ASQ-3
View/Edit General TouchPoints	Group Meeting WITH Attendance (Participant TouchPoint)	ASQ-SE
Referrals	Group Meeting WITHOUT Attendance (General TouchPoint)	Bracken
Data Quality		Brigance 2
		Brigance 3
		Peabody
		Unlisted Child Assessment



## **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 (HIPPI Parent Involvement Interview) to check for completion.