HIPPYUSA®

Home Instruction for Parents of Preschool Youngsters

Efforts to Outcomes (ETO) Data Entry Guide

HIPPY partners with parents to prepare their children for success in school.

HIPPY USA
Home Instruction for Parents of Preschool Youngsters

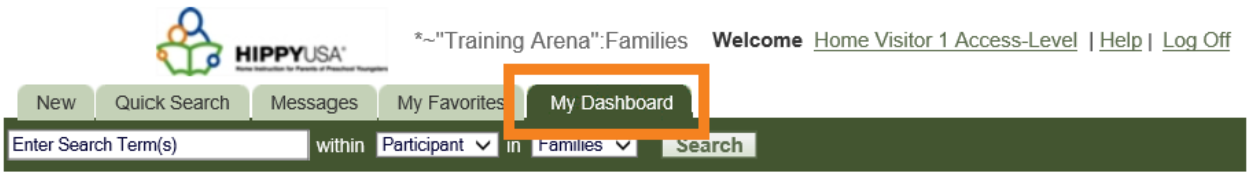
CONTENTS

HIPPYUSA®
Home Instruction for Parents of Preschool Youngsters

HOME VISITORS

MY DASHBOARD HOME VISITOR ACCESS-LEVEL NAVIGATION

My Dashboard is now the landing place when logging into ETO. View messages pertaining to ETO, download the HUSA ETO Data Entry Guide, and use the new menu to navigate ETO. Click the My Dashboard tab from any ETO screen to return to My Dashboard.



APPLICATION DATA ENTRY FLOWCHART

Below are steps for different data entry methods based on new or previous data entry of participants in ETO.

Jumping between instruction sections will be necessary. Use the Return to Table of Contents (TOC) link at the bottom of each page to return to the TOC for the next data entry step.

NEW PARENT AND NEW CHILD(REN)

1. Add New Family (HIPPY Application page 1)
2. Add Participants to Caseload
3. Record New Adult Education TouchPoint (HIPPY Application page 2)
4. Record New Adult Information TouchPoint (HIPPY Application page 2)
5. Record New Child Information TouchPoint (HIPPY Application page 3)

CONTINUING PARENT AND CONTINUING CHILD(REN)

1. Add Participants to My Caseload
2. View/Edit Participant Demographics on parent and child (HIPPY Application page 1)
3. Record New Adult Education TouchPoint (HIPPY Application page 2)
4. Record New Adult Information TouchPoint (HIPPY Application page 2)
5. Record New Child Information TouchPoint (HIPPY Application page 3)

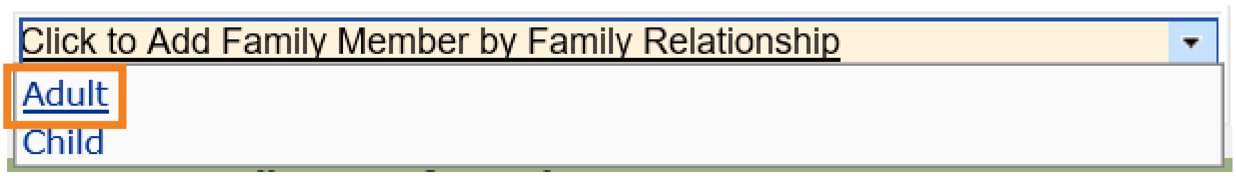
CONTINUING PARENT AND NEW CHILD(REN)

1. Add New Child(ren) to Existing Family (HIPPY Application page 1)
2. Add Participants to My Caseload
3. View/Edit Participant Demographics on parent and child (HIPPY Application page 1)
4. Record New Adult Education TouchPoint (HIPPY Application page 2)
5. Record New Adult Information TouchPoint (HIPPY Application page 2)
6. Record New Child Information TouchPoint (HIPPY Application page 3)

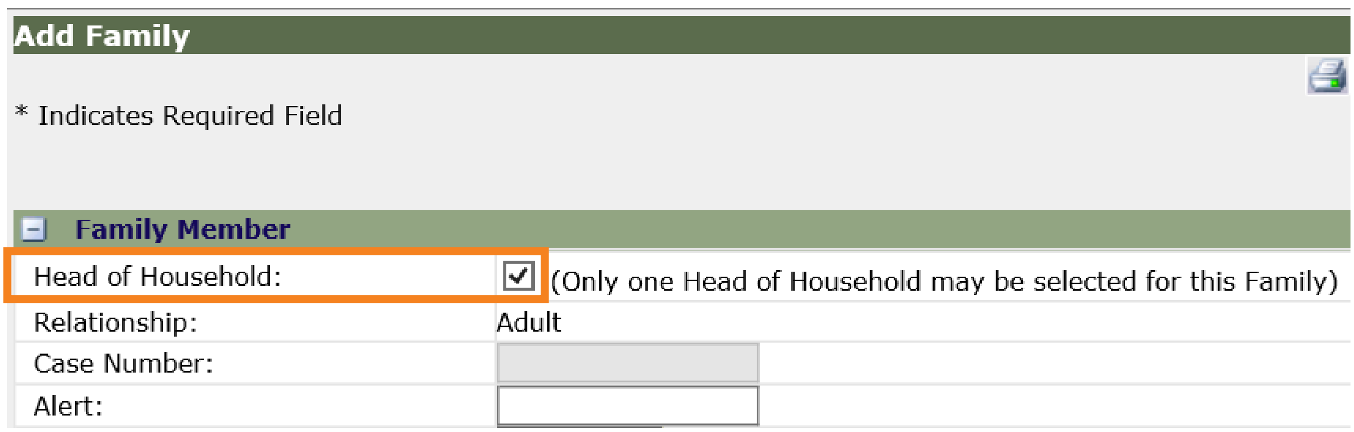
ADD NEW FAMILY (HIPPY APPLICATION PAGE 1)

1. Click on Add New Family under My Dashboard

2. Click on the WORD Adult in the Click to Add Family Member by Family Relationship dropdown



3. Check the Head of Household box on the Adult



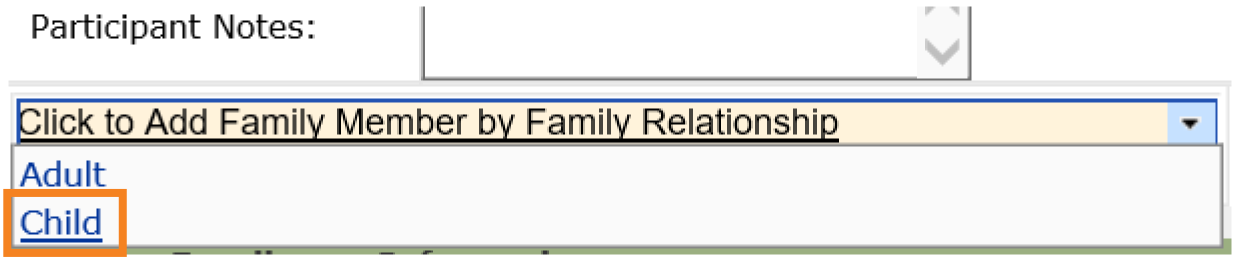
NOTE: *Case Number is automatically assigned by ETO*

NOTE: *Alert is an optional field*

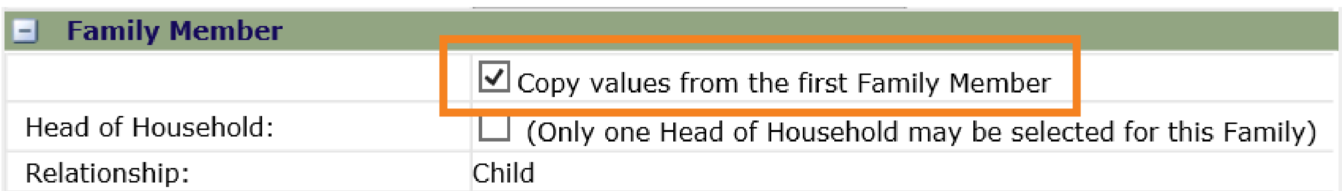
4. Answer all required questions and any optional or notes as needed

NOTE: *Remember any items marked with an asterisk are required fields*

5. Click on the WORD Child in the Click to Add Family Member by Family Relationship dropdown below Participant Notes



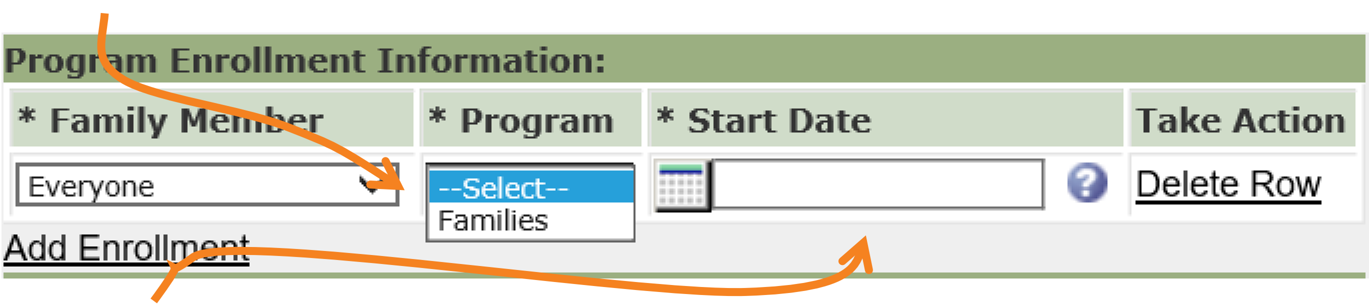
6. Check the Copy values from the first Family Member box



7. Answer all required questions and any optional or notes as needed

   NOTE: *Remember any items marked with an asterisk are required fields*

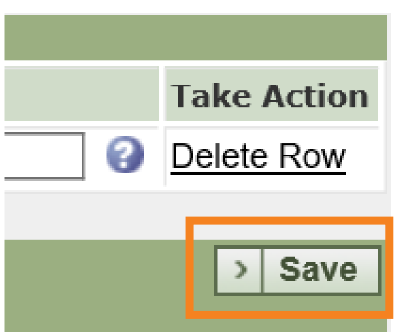
8. Repeat steps 5-7 to add additional children
9. Select Families from the Program dropdown



10. Enter the Start Date

    NOTE: *Start Date will be when the participant(s) began with HIPPY*

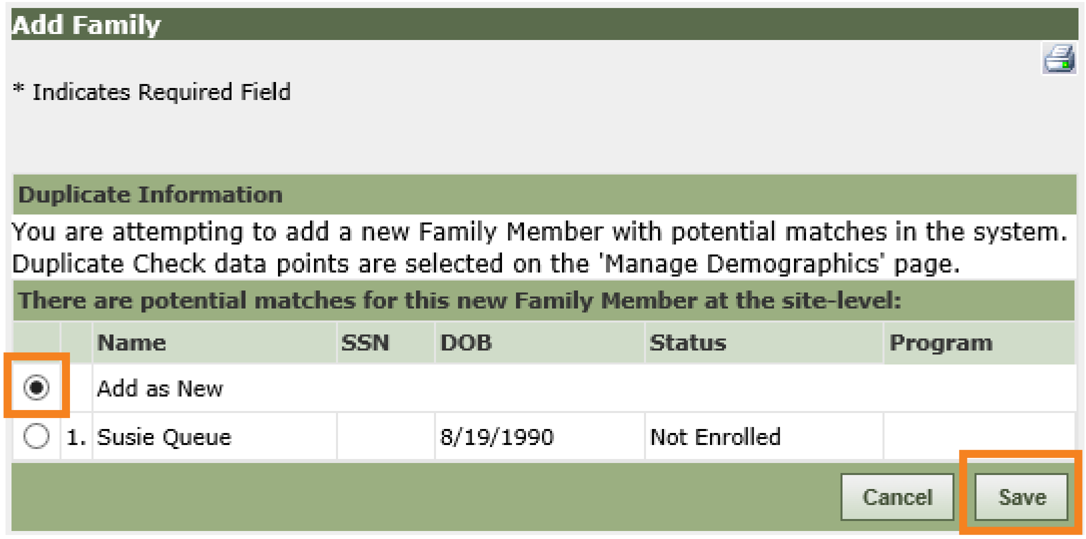
11. Click the Save button at bottom of page



POTENTIAL DUPLICATE FAMILY MEMBER

ETO may show participants as already entered when it finds a possible match:

- If a DIFFERENT person: Select Add as New and click the Save button


Add Family

* Indicates Required Field

Duplicate Information

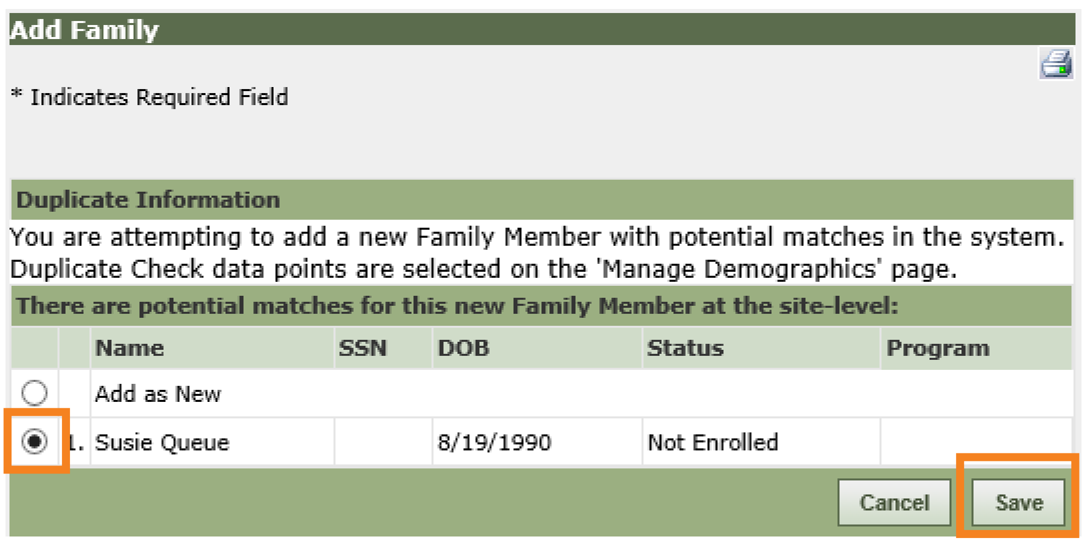
You are attempting to add a new Family Member with potential matches in the system. Duplicate Check data points are selected on the 'Manage Demographics' page.

There are potential matches for this new Family Member at the site-level:

		Name	SSN	DOB	Status	Program
◉		Add as New				
○	1.	Susie Queue		8/19/1990	Not Enrolled	

Cancel Save

- If the SAME person: Select the participant name and click the Save button


Add Family

* Indicates Required Field

Duplicate Information

You are attempting to add a new Family Member with potential matches in the system. Duplicate Check data points are selected on the 'Manage Demographics' page.

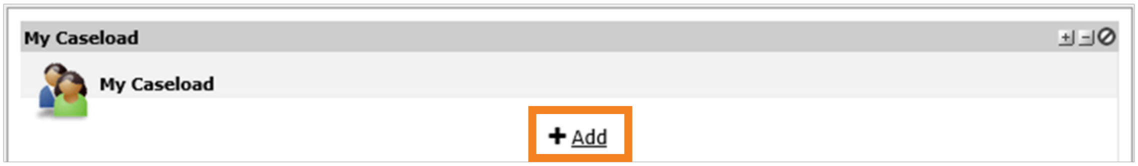
There are potential matches for this new Family Member at the site-level:

		Name	SSN	DOB	Status	Program
○		Add as New				
◉	1.	Susie Queue		8/19/1990	Not Enrolled	

Cancel Save

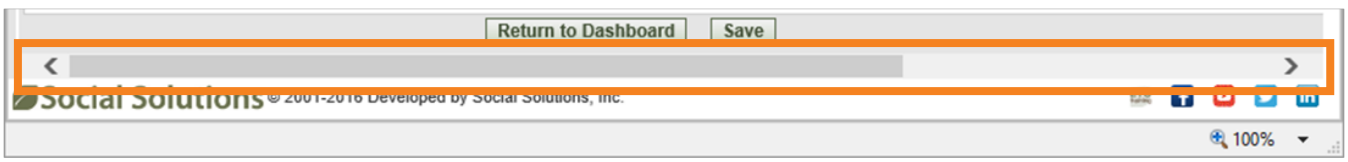
CASELOAD MANAGEMENT: ADD PARTICIPANTS TO MY CASELOAD

1. Scroll to My Caseload at the bottom of the My Dashboard screen (below the blue data entry buttons) under My Dashboard
2. Click the Add link

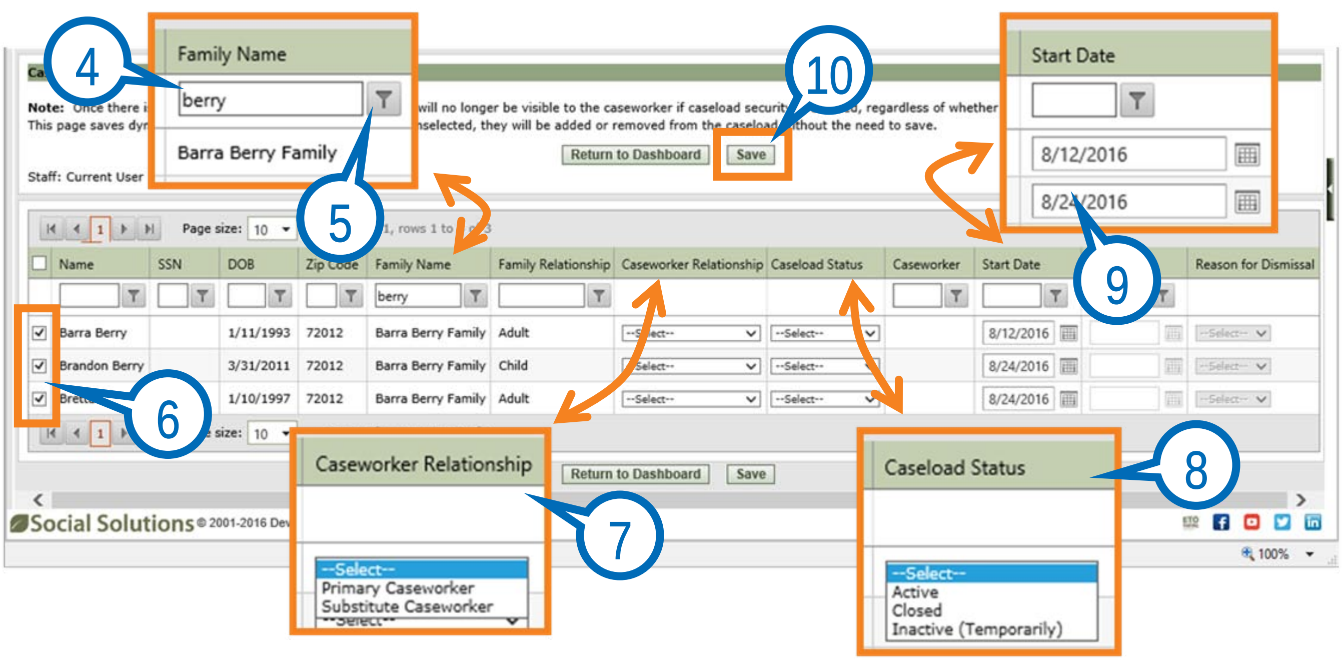


NOTE: *If coordinators manage home visitor caseloads, use [Manage Staff Caseloads] instead of the My Caseload.*

3. Scroll to the right with the scrollbar at the bottom to view all data fields

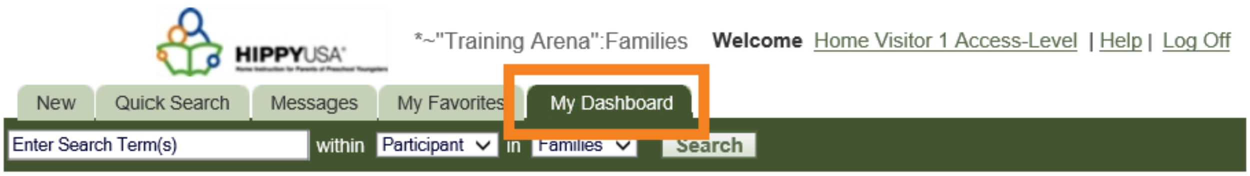


4. Search for all family members by typing the family name in the Family Name filter (or for individuals with the Name filter)
5. Click the filter next to the text field
6. Check box(es) to the left of each participant to be assigned
7. Caseworker Relationship: Select Primary Caseworker for each family member
8. Caseload Status: Select Active
9. Start Date: Select date ASSIGNED TO CASEWORKER
10. Click the Save button at top or bottom of page

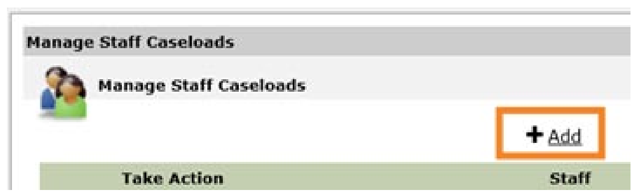


CASELOAD MANAGEMENT: LOCATE ALL UNASSIGNED PARTICIPANTS

1. Click the My Dashboard tab

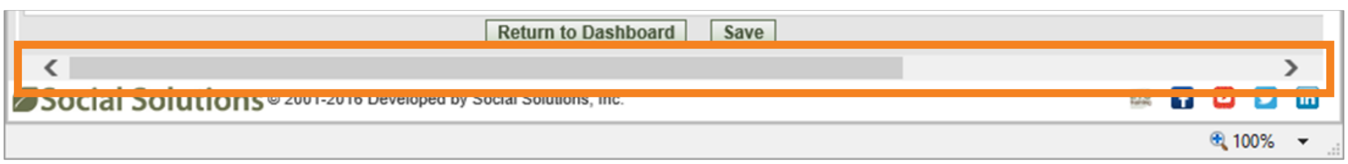


2. Scroll to the My Caseload or Manage Staff Caseloads box at the bottom of the My Dashboard screen (below the blue data entry buttons)
3. Click the Add link

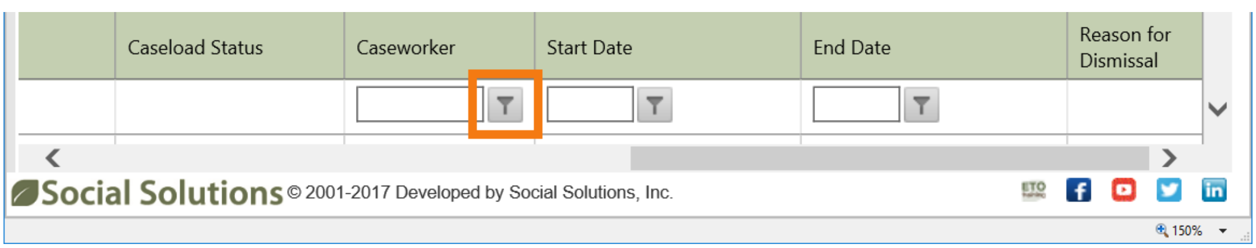


NOTE: *If **coordinators manage home visitor caseloads**, use Manage Staff Caseloads instead of My Caseload.*

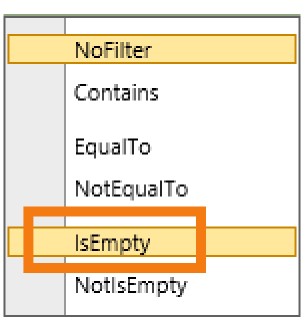
4. Scroll to the right with the scrollbar at the bottom to view all data fields



5. Click the filter button next to the text box in the Caseworker column



6. Select IsEmpty to filter out all currently assigned participants from the list

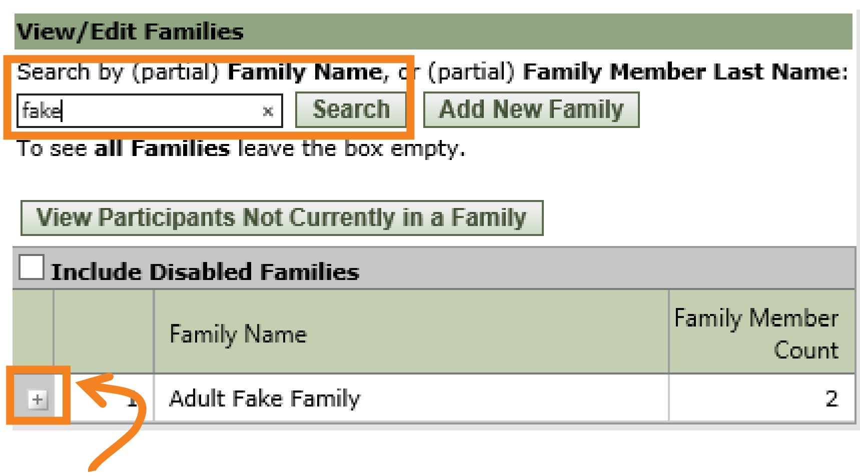


VIEW/EDIT FAMILY OR ADD NEW MEMBERS TO FAMILY

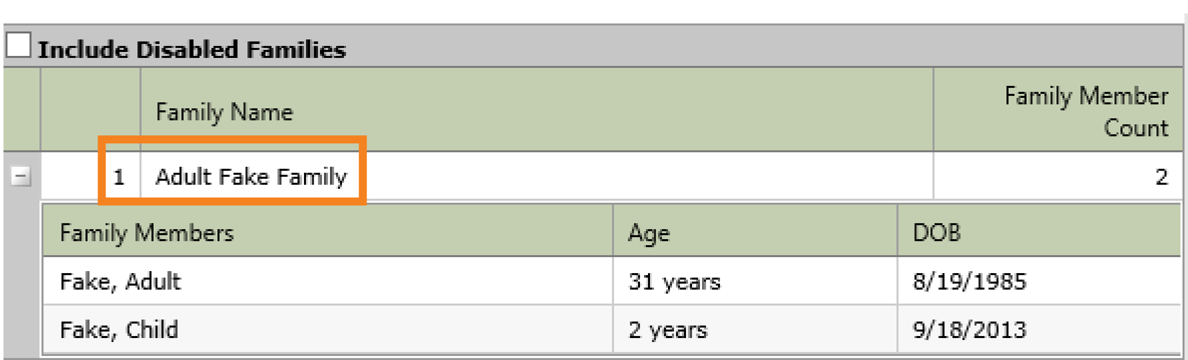
VIEW/EDIT FAMILY

1. Click on View/Edit Family or Add New Members to Family under My Dashboard

2. Type family name in box and click the Search button



3. Click to see all members in the family to ensure it is the correct family
4. Click on the family name

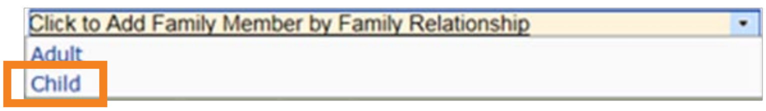


ADD NEW CHILD(REN) TO EXISTING FAMILY

1. Complete View/Edit Family steps 1-4 and click on the Add New Family Member blue link

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Adult Fake	31	08/19/1985	Adult	Head of Family | Delete
2	Child Fake	2	09/18/2013	Child	Select as Head | Delete

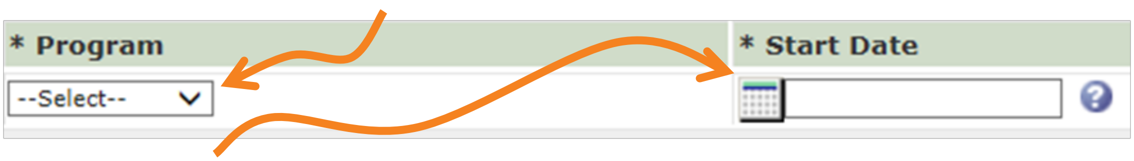
2. In the Click to Add Family Member by Family Relationship dropdown, click on the word Child



3. Answer all required questions and any optional or notes as needed

   NOTE: *Remember any items marked with an asterisk are required fields*

4. Select Families from the Program dropdown



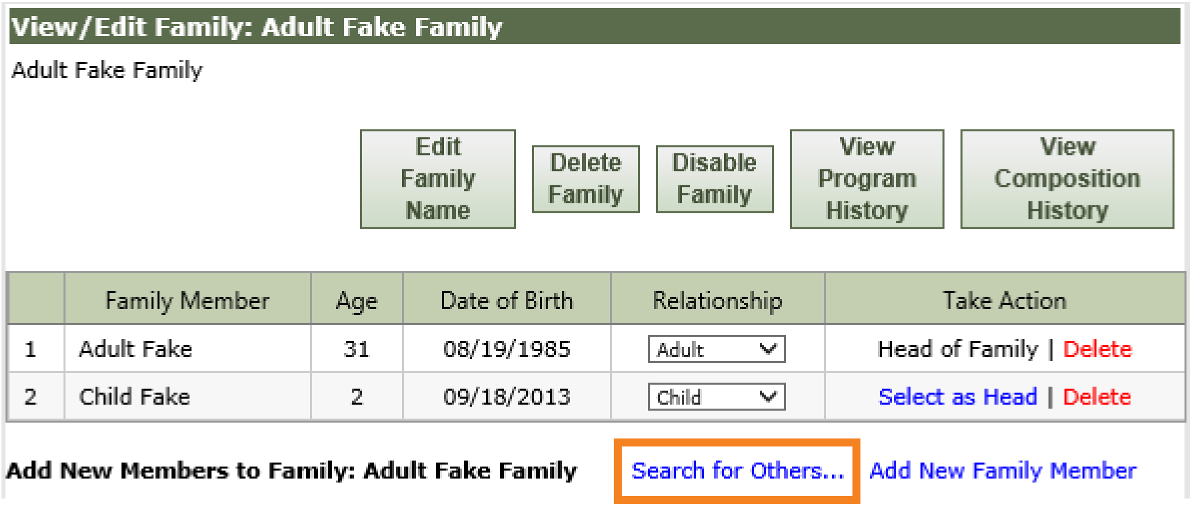
5. Enter the Start Date

   NOTE: *Start Date will be when the participant(s) began with HIPPY*

6. Click the Save button at bottom of page

ADD EXISTING PARTICIPANT(S) TO FAMILY

1. Complete View/Edit Family steps 1-4 and click on the Search for Others blue link



View/Edit Family: Adult Fake Family

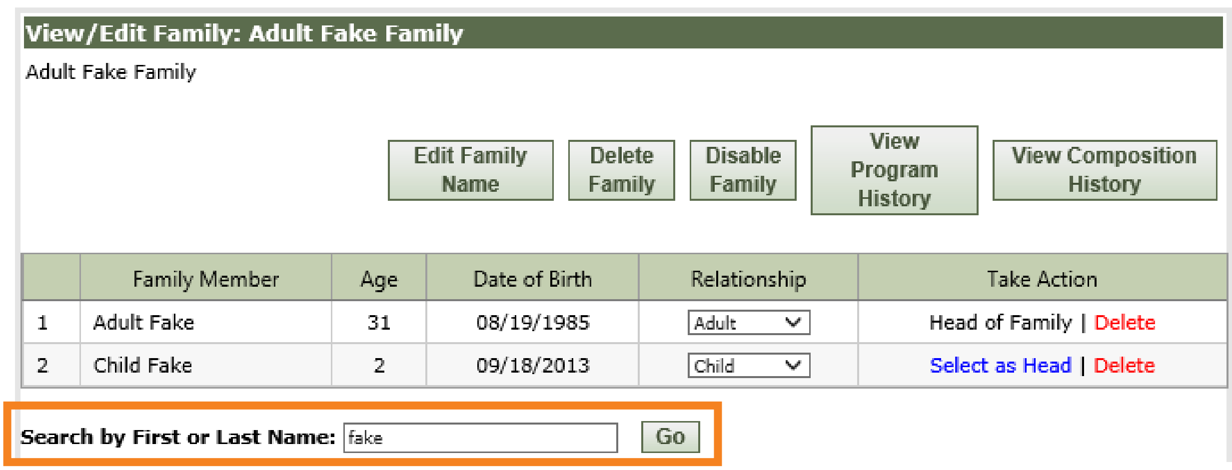
Adult Fake Family

Edit Family Name | Delete Family | Disable Family | View Program History | View Composition History

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Adult Fake	31	08/19/1985	Adult	Head of Family | Delete
2	Child Fake	2	09/18/2013	Child	Select as Head | Delete

Add New Members to Family: Adult Fake Family Search for Others... Add New Family Member

2. Type a participant name in the Search by First or Last Name box and click the Go button



View/Edit Family: Adult Fake Family

Adult Fake Family

Edit Family Name | Delete Family | Disable Family | View Program History | View Composition History

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Adult Fake	31	08/19/1985	Adult	Head of Family | Delete
2	Child Fake	2	09/18/2013	Child	Select as Head | Delete

Search by First or Last Name: fake Go

3. Check the box to the left of the participant(s) to be added to the family and click the Add New Members to Family button

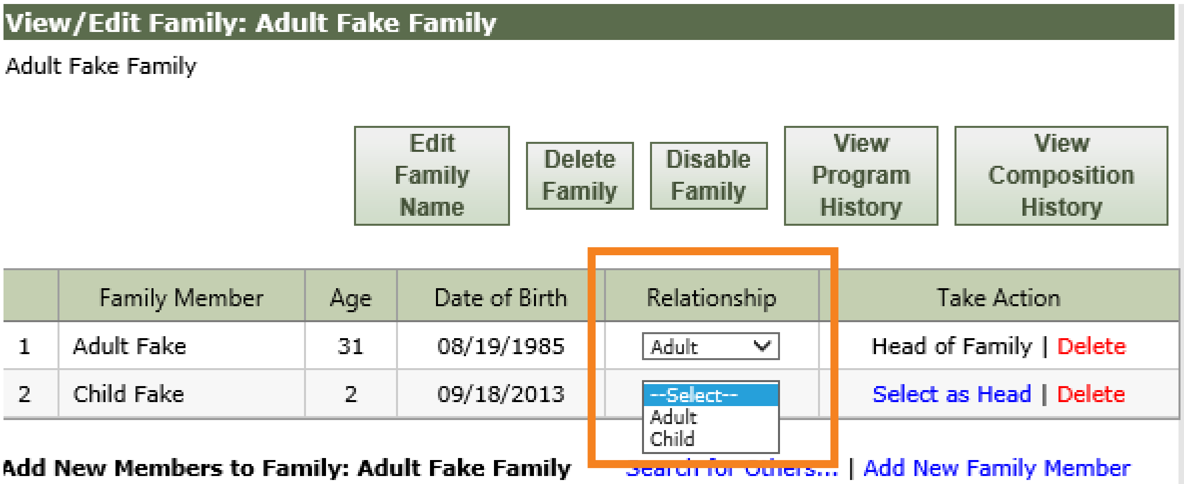
Search by First or Last Name: fake Go

☑	Name	Family Name
☑	Fake, Grandmamma (DOB: 10/08/1947)	

Add New Members to Adult Fake Family

SELECT RELATIONSHIP FOR EXISTING MEMBERS ADDED TO FAMILY

Complete View/Edit Family steps 1-4 and use Relationship dropdown to select correct relationship for any family members missing a relationship



EDIT A FAMILY NAME

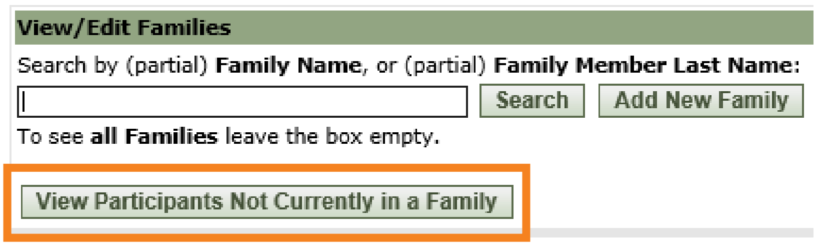
1. Complete View/Edit Family steps 1-3 and click the Edit Family Name button

2. Edit the family name and click the Save Family Name button

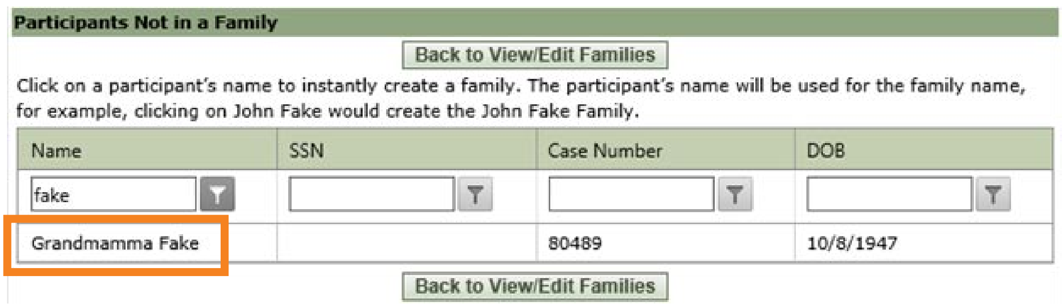
FIND HIPPY PARENTS NOT CURRENTLY IN A FAMILY

1. Complete View/Edit Family steps 1-4 and click the View Participants Not Currently in a Family button

   ***NOTE**: This should only be used for adult clients*



2. Click on the participant's name to automatically create a family named after and containing that adult

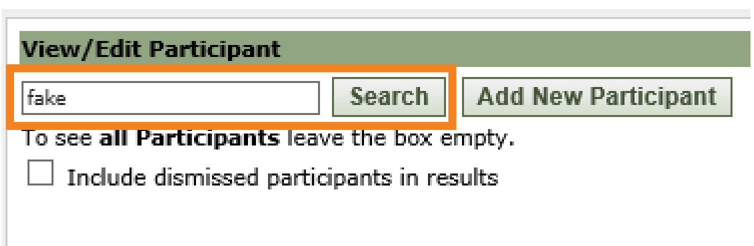


VIEW/EDIT PARTICIPANT DEMOGRAPHICS

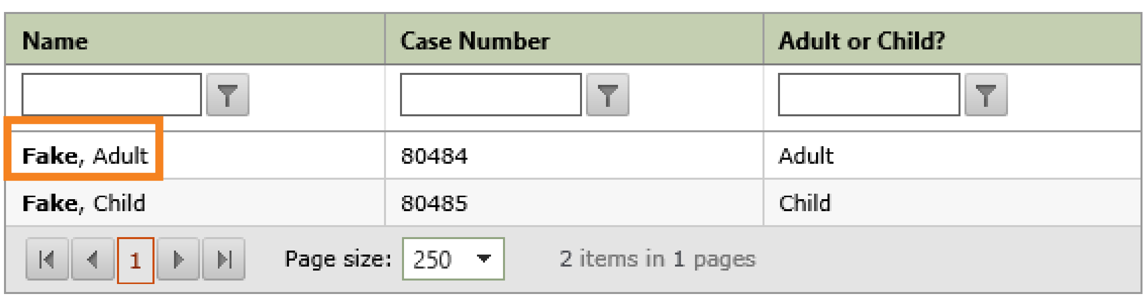
VIEW/EDIT PARTICIPANT

1. Click on View/Edit Participant Demographics under My Dashboard

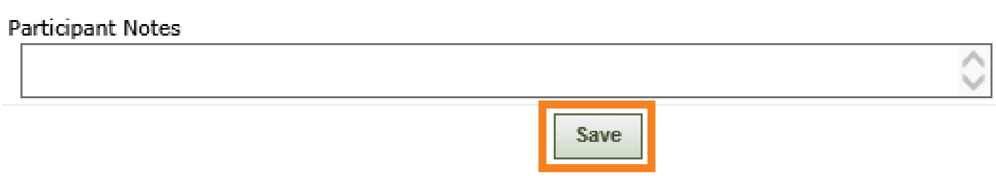
2. Type a participant's name in the box click the Search button



3. Click the participant's name



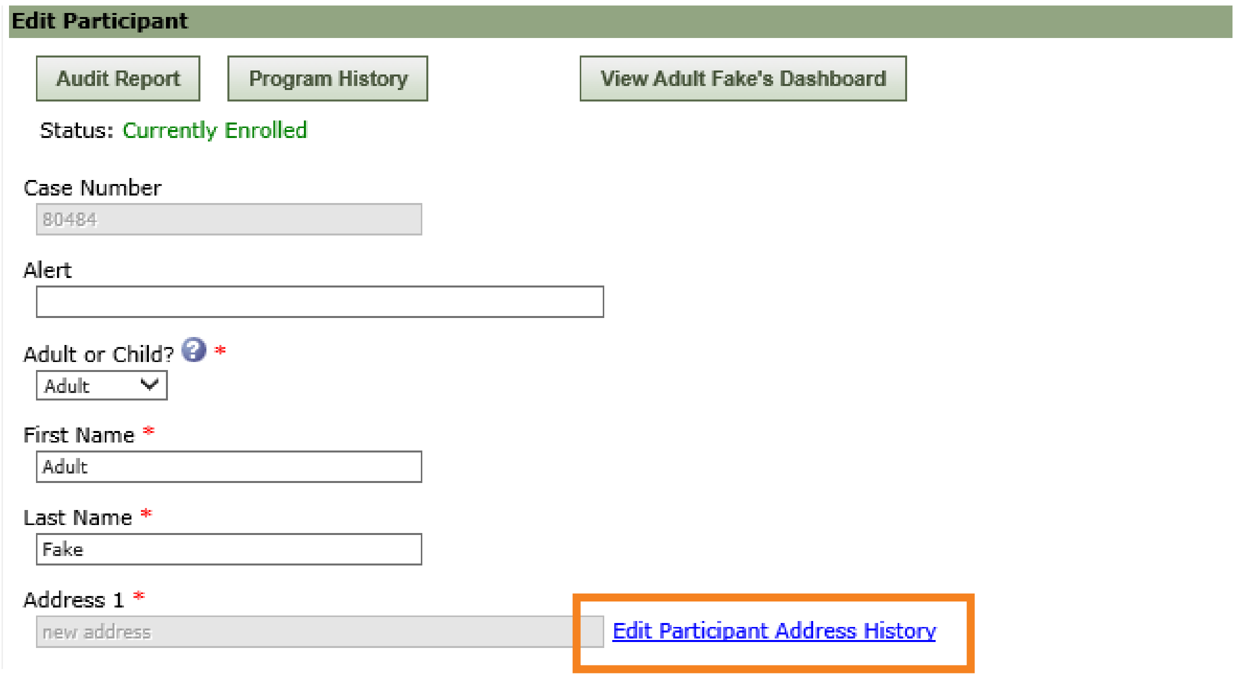
4. Make corrections and click the Save button at the bottom of the page



PARTICIPANT ADDRESS HISTORY

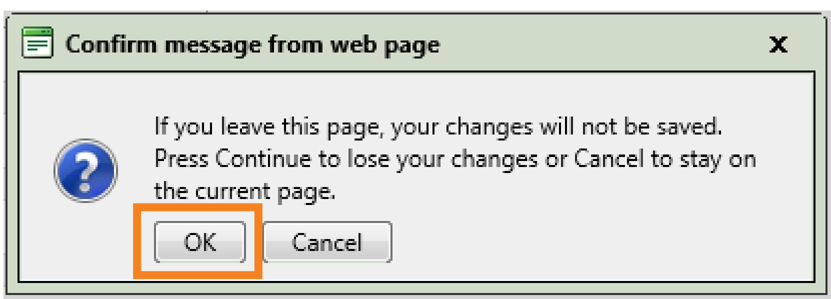
VIEW PARTICIPANT ADDRESS HISTORY

1. Complete View/Edit Participant steps 1-3
2. Click on the Edit Participant Address History blue link to the right of the current address



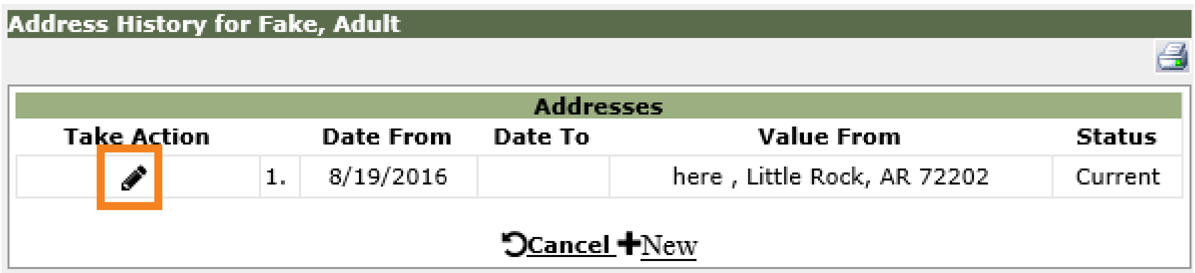
3. Click OK to leave the page

NOTE: *Save any edits made to demographics before clicking OK or CHANGES WILL BE LOST!*

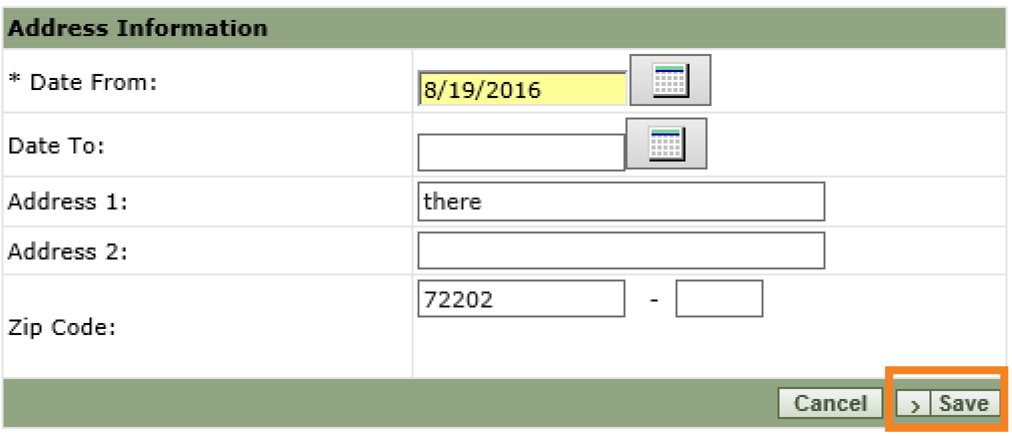


CORRECT AN ADDRESS ERROR

1. Complete View/Edit Participant steps 1-3 and View Participant Address History steps 1-3
2. Click on the left of the address needing corrections



3. Make corrections needed and click the Save button to return to the demographics page



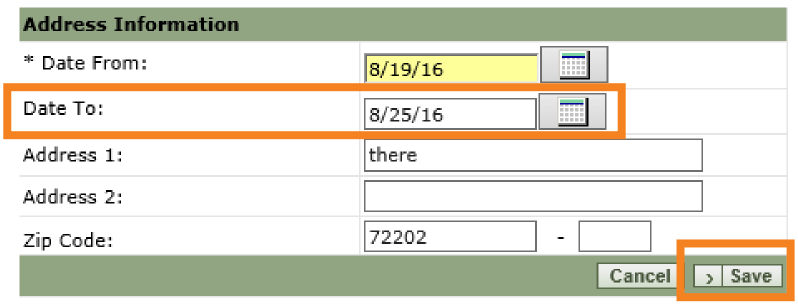
4. Click Cancel to return to the demographics page

ADD A NEW ADDRESS AFTER A PARTICIPANT MOVES

1. Complete View/Edit Participant steps 1-3 and View Participant Address History steps 1-3

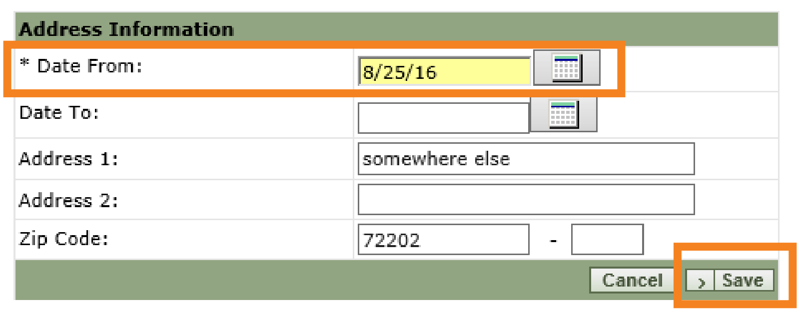
2. Click on the left of the old address

3. Enter the date of move in the Date To box and click the Save button



4. Click +New to add the new address

5. Enter the date of move into the Date From box



6. Add the street address and zip code

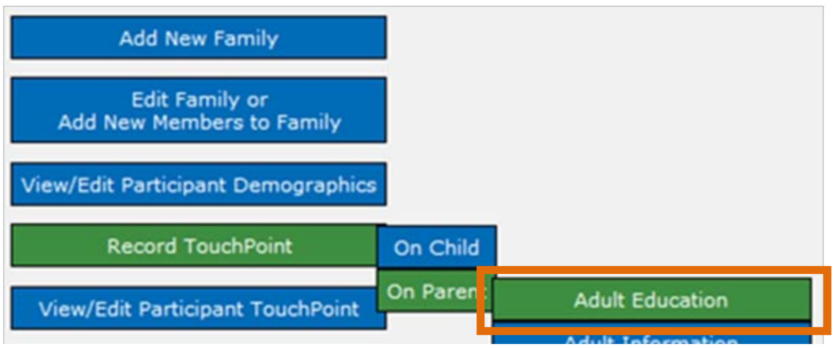
7. Click the Save button

8. Click Cancel to return to the demographics page

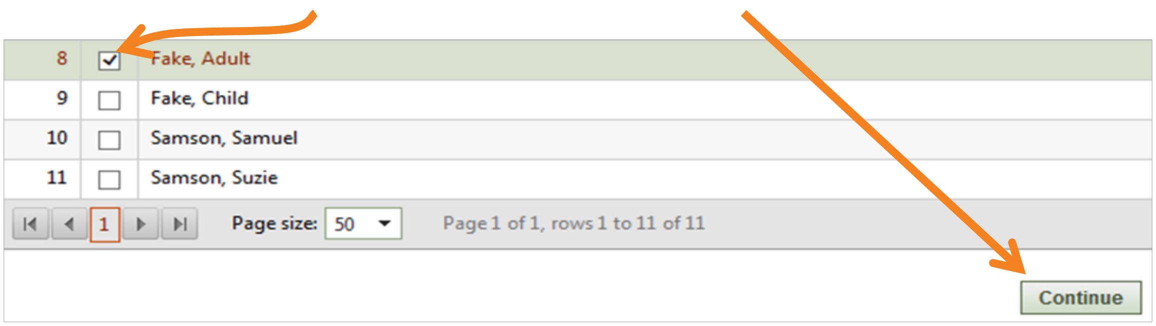
RECORD TOUCHPOINT (HOME VISITORS)

RECORD NEW ADULT EDUCATION TOUCHPOINT (HIPPY APPLICATION PAGE 2)

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over to On Parent
3. Then move the mouse arrow over and click on Adult Education

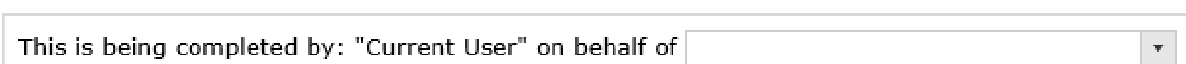


4. Find adult client's name, check box to the left of the name and click the Continue button



5. In top green box enter <u>date form was filled out</u>, (not entered into the system)

6. Use the on behalf of dropdown <u>ONLY</u> when someone other than the home visitor is entering the data



7. Check only the HIPPY Parent box if the adult is NOT CURRENTLY a HIPPY Staff Member, otherwise check both boxes

8. Answer all required questions and any optional or notes as needed

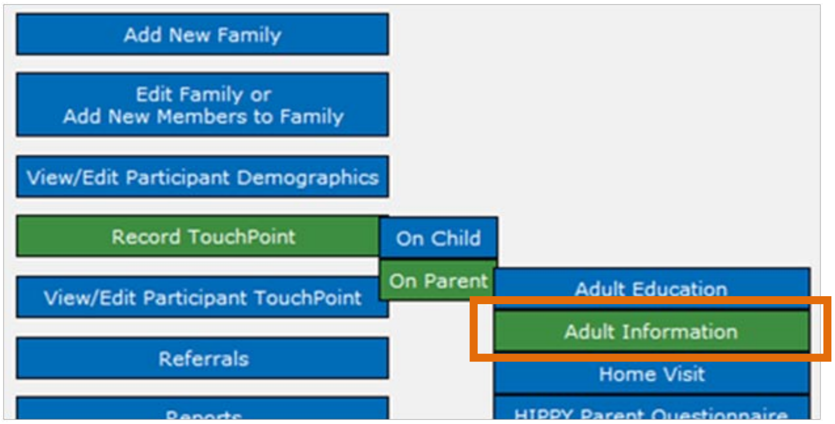
   NOTE: *Remember any items marked with an asterisk are required fields*

9. Click the Save button at bottom of page and OK in the submittal confirmation box

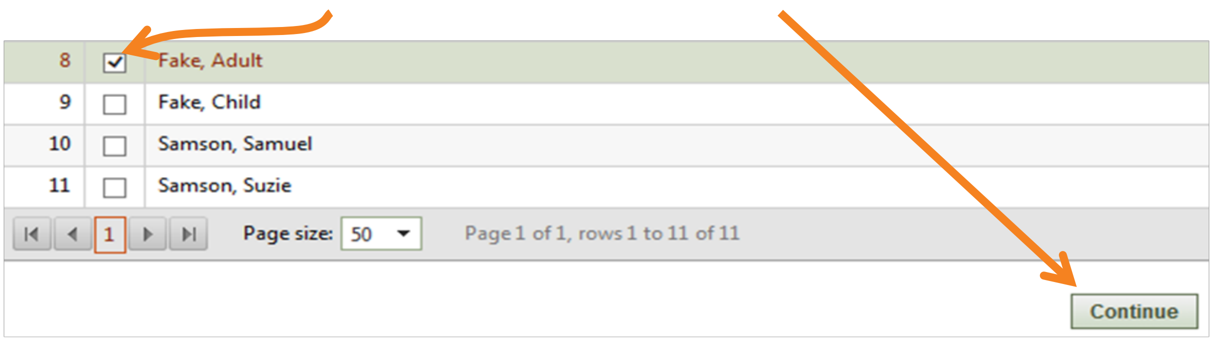
HIPPYUSA®
Home Instruction for Parents of Preschool Youngsters

RECORD NEW ADULT INFORMATION TOUCHPOINT (HIPPY APPLICATION PAGE 2)

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over to On Parent
3. Then move the mouse arrow over and click on Adult Information

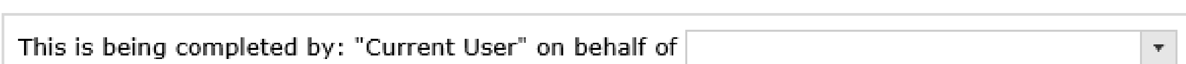


4. Find adult client's name, check box to the left of the name and click the Continue button



5. In top green box enter <u>date form was filled out</u>, (not entered into the system)

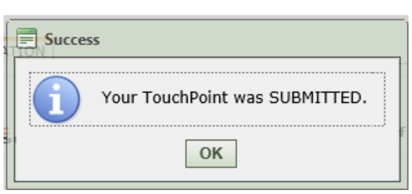
6. Use the on behalf of dropdown <u>ONLY</u> when someone other than the home visitor is entering the data



7. Answer all required questions and any optional or notes as needed

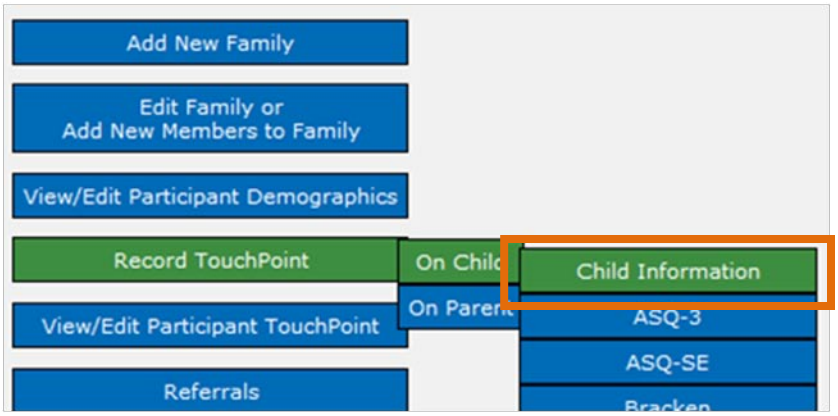
   NOTE: *Remember any items marked with an asterisk are required fields*

8. Click the Save button at bottom of page and OK in the submittal confirmation box



RECORD NEW CHILD INFORMATION TOUCHPOINT (HIPPY APPLICATION PAGE 3)

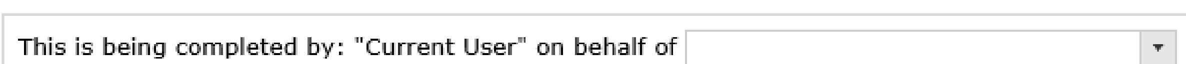
1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over to On Child
3. Then move the mouse arrow over and click on Child Information



4. Find child client's name, check box to the left of the name and click the Continue button

5. In top green box enter <u>date form was filled out</u>, (not entered into the system)

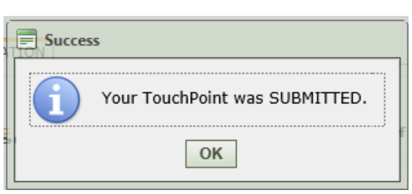
6. Use the on behalf of dropdown <u>ONLY</u> when someone other than the home visitor is entering the data



7. Answer all required questions and any optional or notes as needed

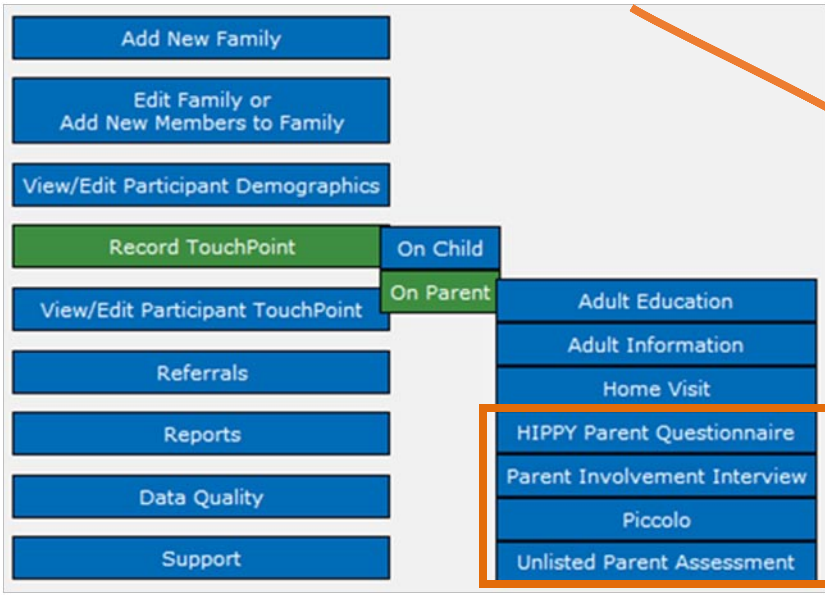
   NOTE: *Remember any items marked with an asterisk are required fields*

8. Click the Save button at bottom of page and OK in the submittal confirmation box



RECORD NEW PARENT ASSESSMENT TOUCHPOINT

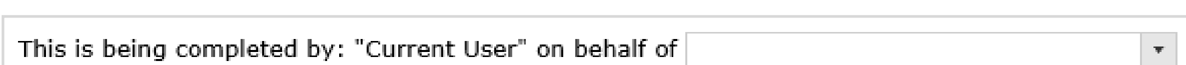
1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over to On Parent
3. In the last set of choices, select the appropriate assessment TouchPoint



4. Find adult client's name, check box to the left of the name and click the Continue button

5. In top green box enter <u>date form was filled out</u>, (not entered into the system)

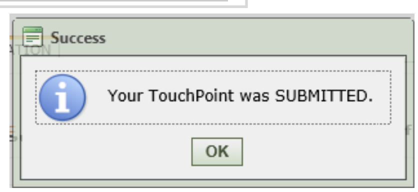
6. Use the on behalf of dropdown <u>ONLY</u> when someone other than the home visitor is entering the data



7. Answer all required questions and any optional or notes as needed

   NOTE: *Remember any items marked with an asterisk are required fields*

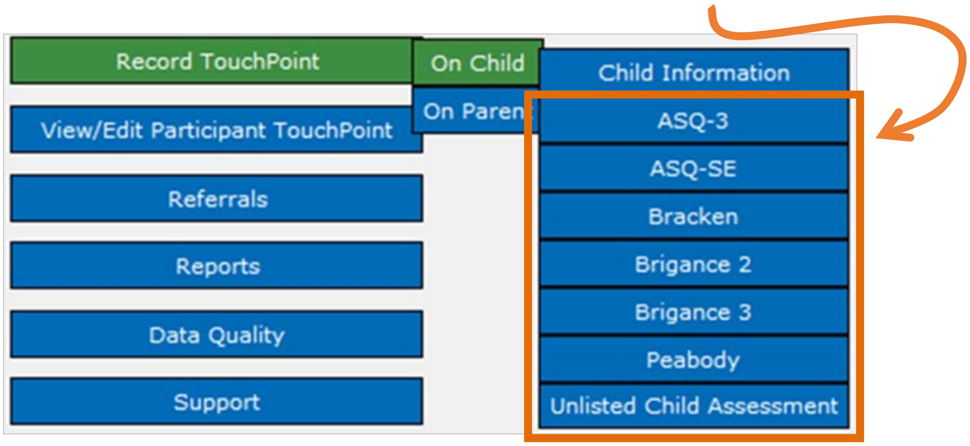
8. Click the Save button at bottom of page and OK in the submittal confirmation box



Return to Table of Contents

RECORD NEW CHILD ASSESSMENT TOUCHPOINT

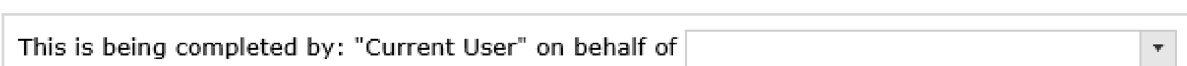
1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over to On Child
3. In the last set of choices, select the appropriate assessment TouchPoint



4. Find child client's name, check box to the left of the name and click the Continue button

5. In top green box enter <u>date form was filled out</u>, (not entered into the system)

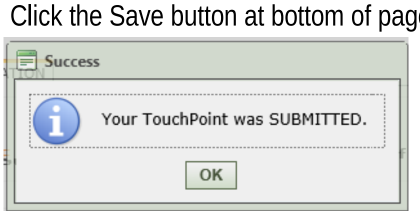
6. Use the on behalf of dropdown <u>ONLY</u> when someone other than the home visitor is entering the data



7. Answer all required questions and any optional or notes as needed

   NOTE: *Remember any items marked with an asterisk are required fields*

8. Click the Save button at bottom of page and OK in the submittal confirmation box

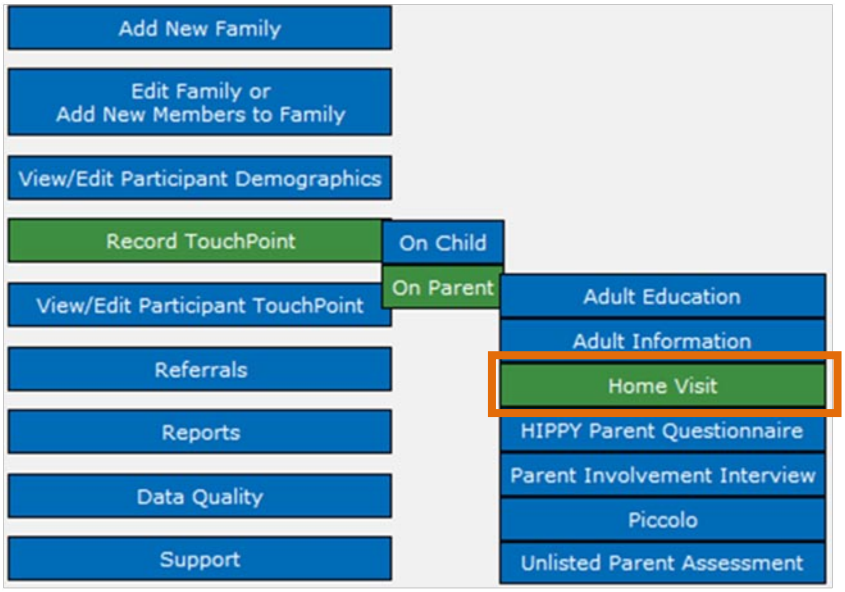


[Return to Table of Contents](#)

HIPPYUSA®
Home Instruction for Parents of Preschool Youngsters

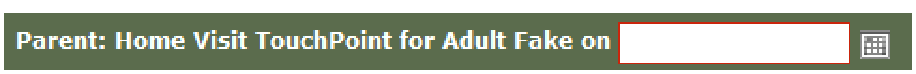
RECORD NEW HOME VISIT TOUCHPOINT

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over to On Parent
3. Then move the mouse arrow over and click on Home Visit

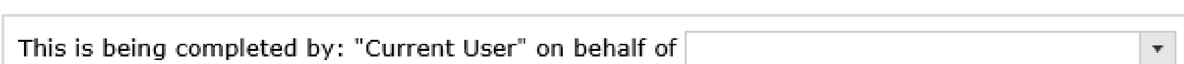


4. Find adult client's name, check box to the left of the name and click the Continue button

5. In top green box enter <u>date form was filled out</u>, (not entered into the system)



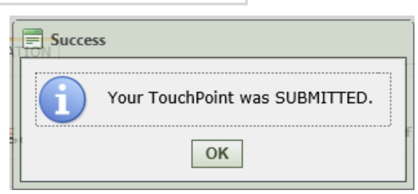
6. Use the on behalf of dropdown <u>ONLY</u> when someone other than the home visitor is entering the data



7. Answer all required questions and any optional or notes as needed

   NOTE: *Remember any items marked with an asterisk are required fields*

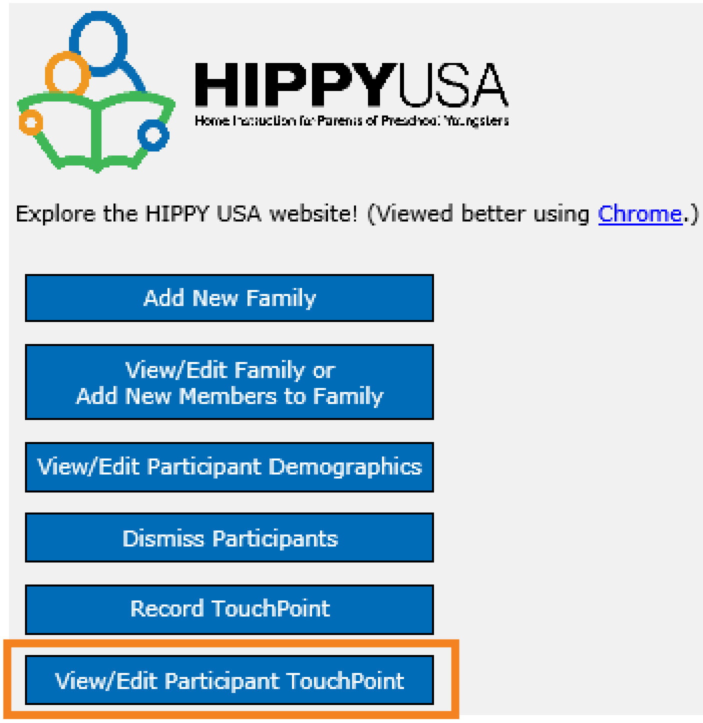
8. Click the Save button at bottom of page and OK in the submittal confirmation box



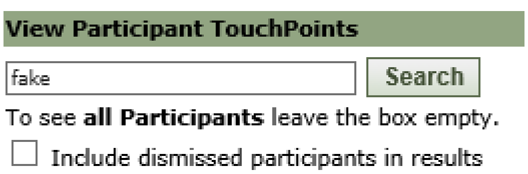
HIPPYUSA
Home Instruction for Parents of Preschool Youngsters

VIEW/EDIT PARTICIPANT TOUCHPOINT

1. Click on View/Edit Participant TouchPoint under My Dashboard



2. Search for the participant by last name



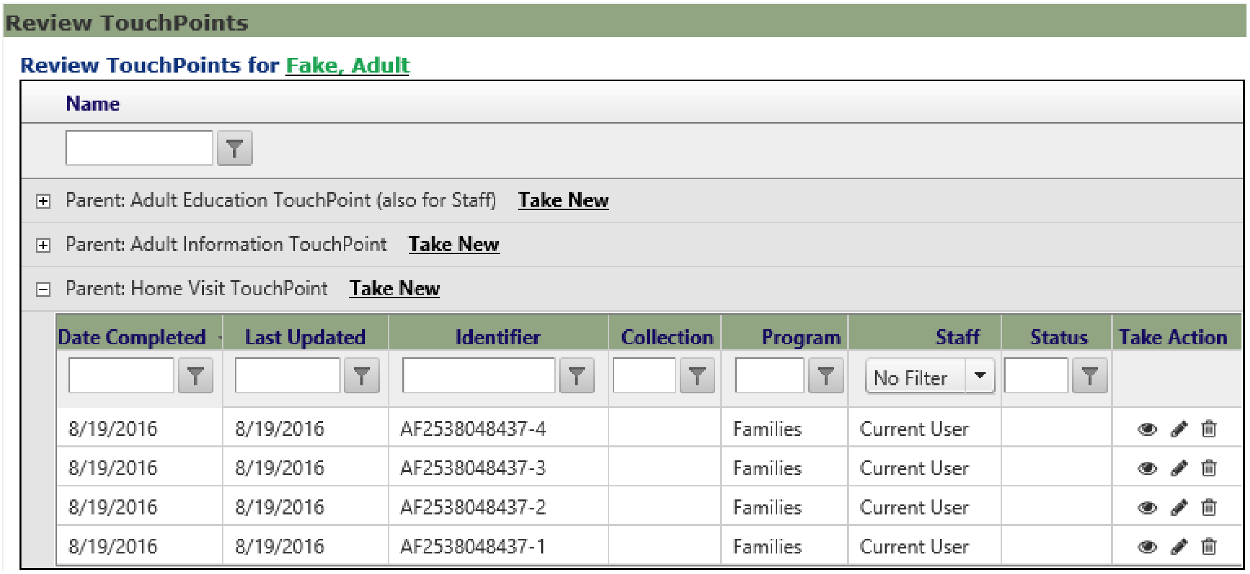
3. Click on the participant's name

Name	Case Number	Adult or Child?
Fake, Adult	80484	Adult
Fake, Child	80485	Child
Fake, Grandmamma	80489	Adult

1 Page size: 250 3 items in 1 pages

Return to Table of Contents

4. Click next to the TouchPoint that need to be viewed or edited
5. Use the Date Completed (or Identifier if more than one TouchPoint was taken on a single date) to select the correct TouchPoint



Review TouchPoints

Review TouchPoints for Fake, Adult

Name

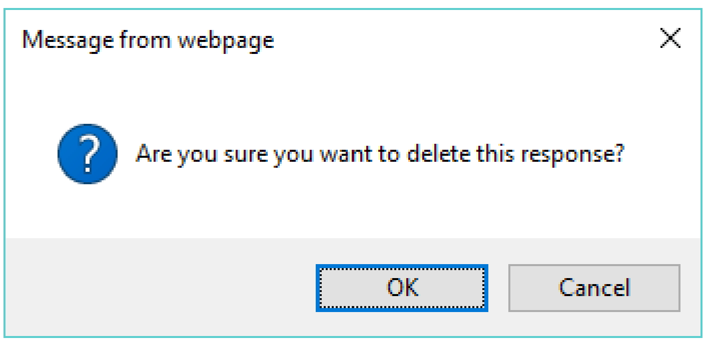
Parent: Adult Education TouchPoint (also for Staff) Take New

Parent: Adult Information TouchPoint Take New

Parent: Home Visit TouchPoint Take New

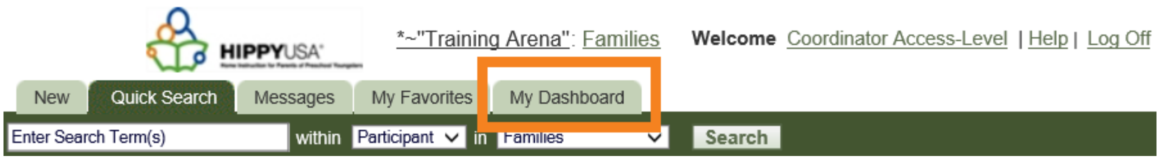
Date Completed	Last Updated	Identifier	Collection	Program	Staff	Status	Take Action
					No Filter		
8/19/2016	8/19/2016	AF2538048437-4		Families	Current User		
8/19/2016	8/19/2016	AF2538048437-3		Families	Current User		
8/19/2016	8/19/2016	AF2538048437-2		Families	Current User		
8/19/2016	8/19/2016	AF2538048437-1		Families	Current User		

6. To view the TouchPoint: Click on the far right under Take Action
7. To edit the TouchPoint: Click on the far right under Take Action, make corrections and click the Save button
8. To delete the TouchPoint: Click on the far right under Take Action and OK



MY DASHBOARD COORDINATOR ACCESS-LEVEL NAVIGATION

My Dashboard is now the landing place when logging into ETO. View messages pertaining to ETO, download the HUSA ETO Data Entry Guide, and use the new menu to navigate ETO. Click the My Dashboard tab from any ETO screen to return to My Dashboard.

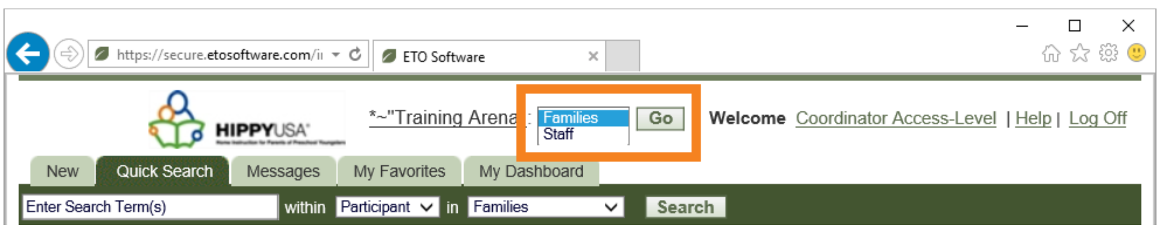


NAVIGATE ETO

SWITCH ETO PROGRAMS

Coordinator access-level users may switch to the Staff program in the current ETO site.

1. Click the current program name at the top, center of ETO
2. Select the name of the other program
3. Click the Go button

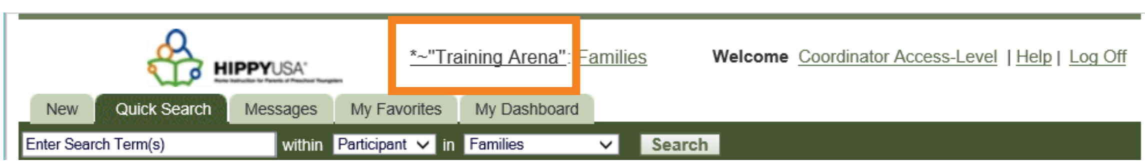


NOTE: *If the program name disappears, click the refresh browser button at the top of the browser window*

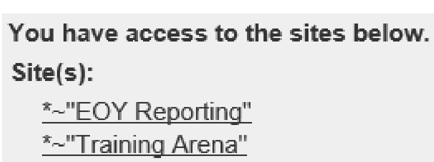
SWITCH ETO SITES

Select ETO users may switch to other ETO sites.

1. Click the current site name at the top, center of the screen



2. Click the name of the desired site



STAFF BACKGROUND DATA ENTRY FLOWCHART

Below are steps for different data entry methods based on new or previous data entry of participants in ETO.

Jumping between instruction sections will be necessary. Use the Return to Table of Contents (TOC) link at the bottom of each page to return to the TOC and select the next data entry step.

NEW STAFF MEMBER

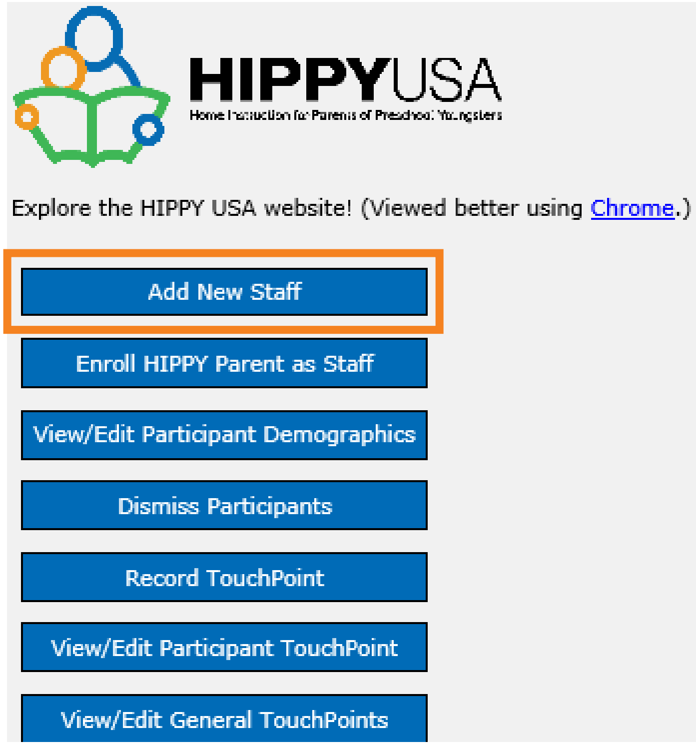
1. Add New Staff [ETO Program: Staff]
2. Record New Staff Education TouchPoint [ETO Program: Staff]
3. Record New Staff Information TouchPoint [ETO Program: Staff]

FORMER HIPPY PARENT OR STAFF

1. Enroll HIPPY Parent as Staff [ETO Program: Staff]
2. View/Edit Participant Demographics
3. Record New Staff Education TouchPoint [ETO Program: Staff]
4. Record New Staff Information TouchPoint [ETO Program: Staff]

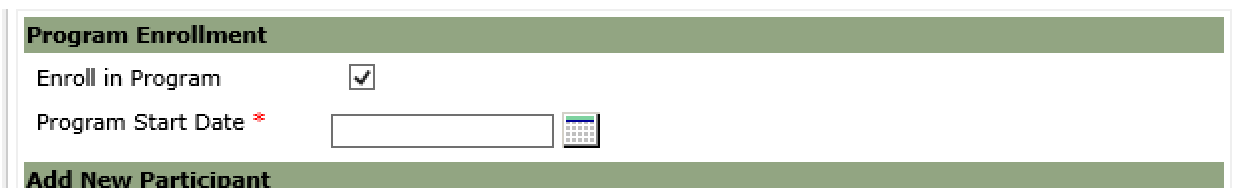
ADD NEW STAFF

1. Under My Dashboard IN THE STAFF PROGRAM, click on Add New Staff



2. Enter the Start Date

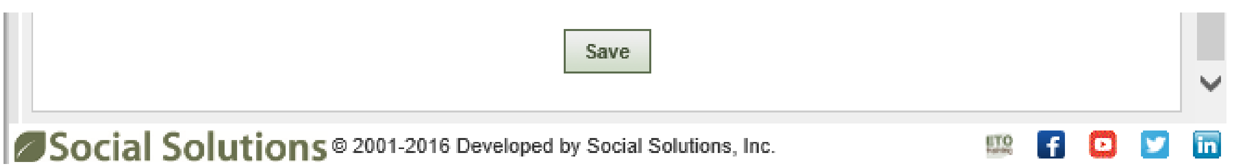
   NOTE: *Start Date will be when the staff member was* ***HIRED*** *with HIPPY*



3. Answer all required questions and any optional or notes as needed

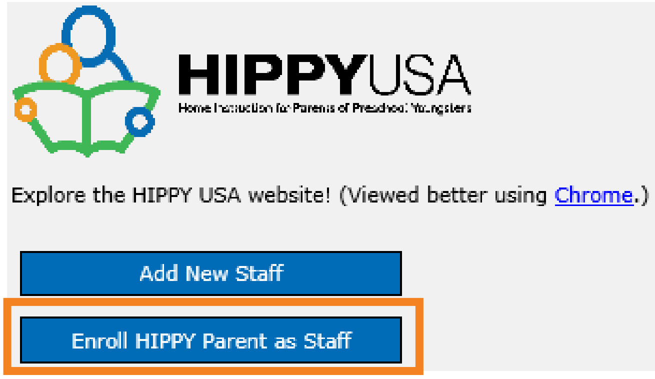
   NOTE: *Remember any items marked with an asterisk are required fields*

4. Click the Save button at bottom of page

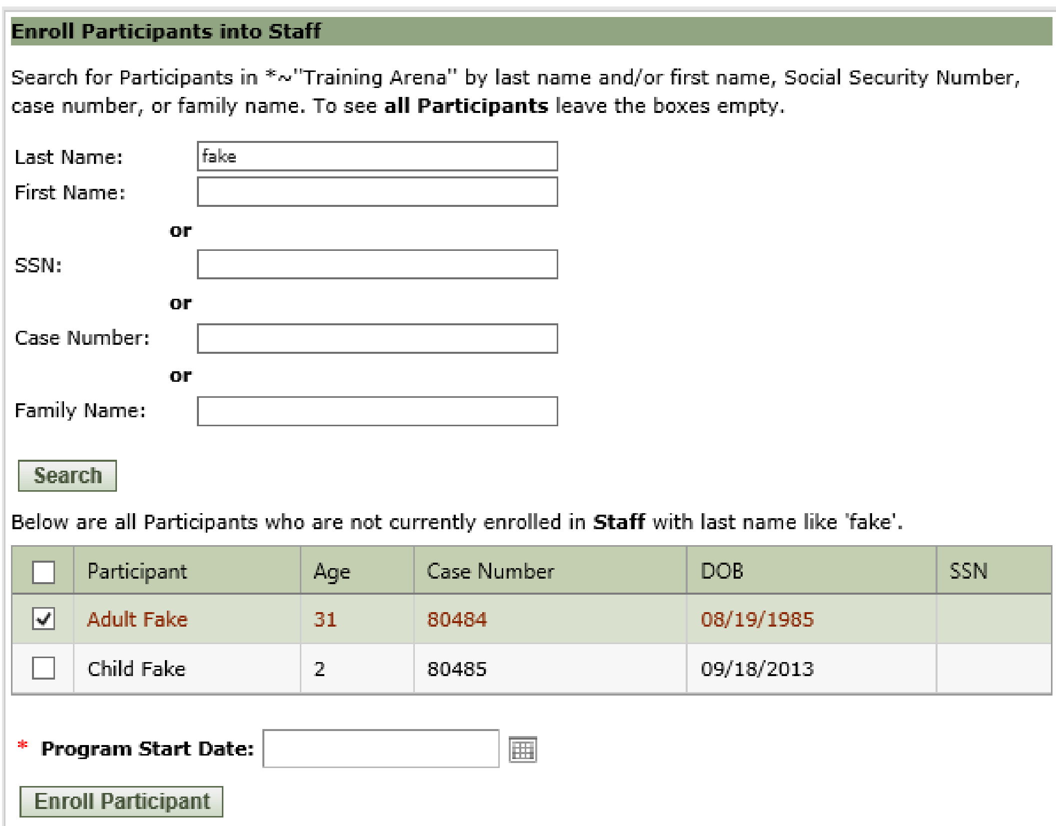


ENROLL HIPPY PARENT AS STAFF

1. Under My Dashboard IN THE STAFF PROGRAM, click on Enroll HIPPY Parent as Staff



2. Search for the HIPPY parent by typing the last name in the Last Name box
3. Click the Search button



4. Find HIPPY parent's name, check box to the left of the name
5. Enter the Program Start Date

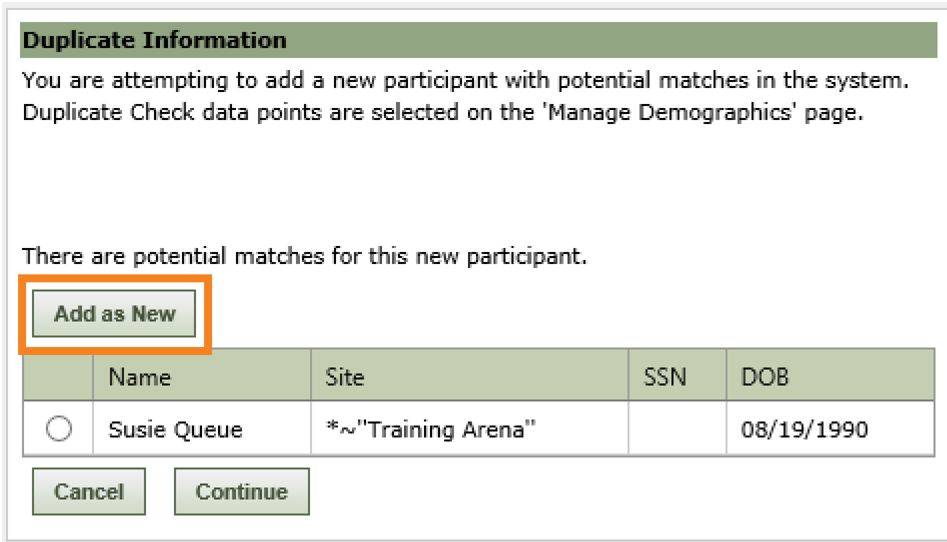
   NOTE: *Program Start Date will be when the staff member was HIRED with HIPPY*

6. Click the Enroll Participant button

Return to Table of Contents

POTENTIAL DUPLICATE PARTICIPANT

- If a DIFFERENT person: Click the Add as New button



Duplicate Information

You are attempting to add a new participant with potential matches in the system.
Duplicate Check data points are selected on the 'Manage Demographics' page.

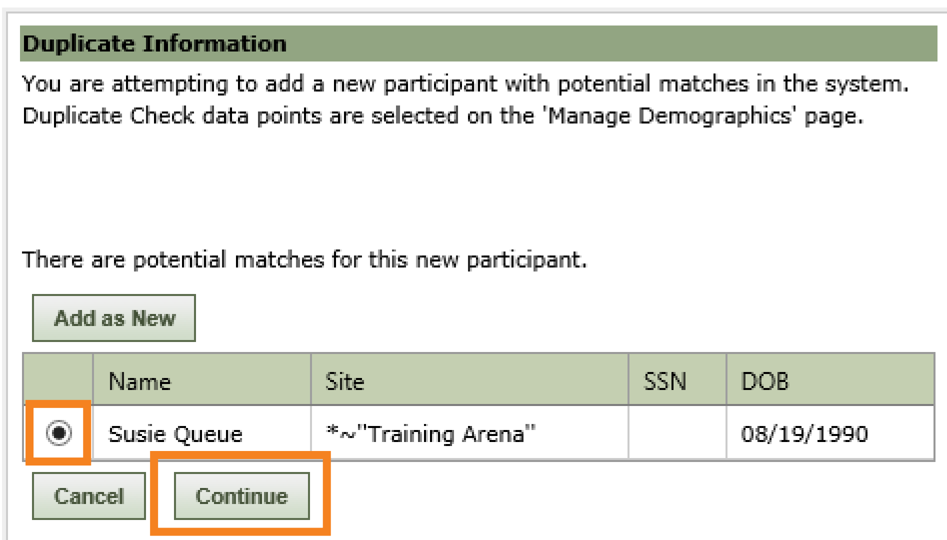
There are potential matches for this new participant.

Add as New

	Name	Site	SSN	DOB
○	Susie Queue	*~"Training Arena"		08/19/1990

Cancel Continue

- If the SAME person: Select the participant name and click the Continue button



Duplicate Information

You are attempting to add a new participant with potential matches in the system.
Duplicate Check data points are selected on the 'Manage Demographics' page.

There are potential matches for this new participant.

Add as New

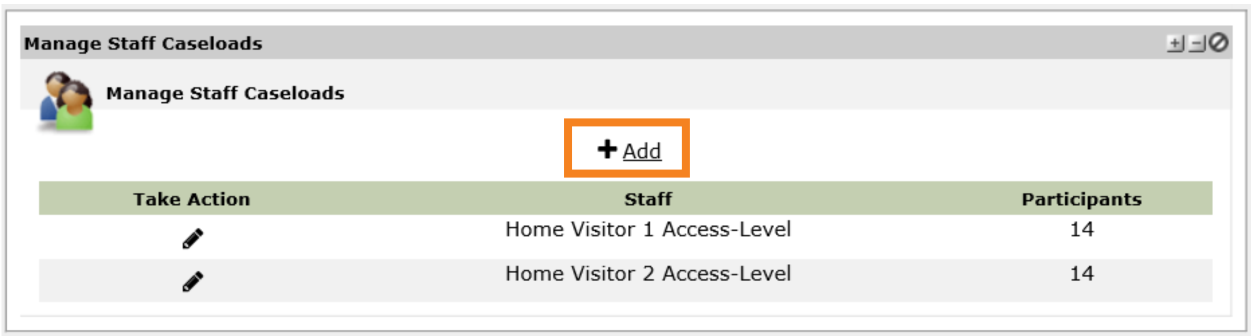
	Name	Site	SSN	DOB
◉	Susie Queue	*~"Training Arena"		08/19/1990

Cancel Continue

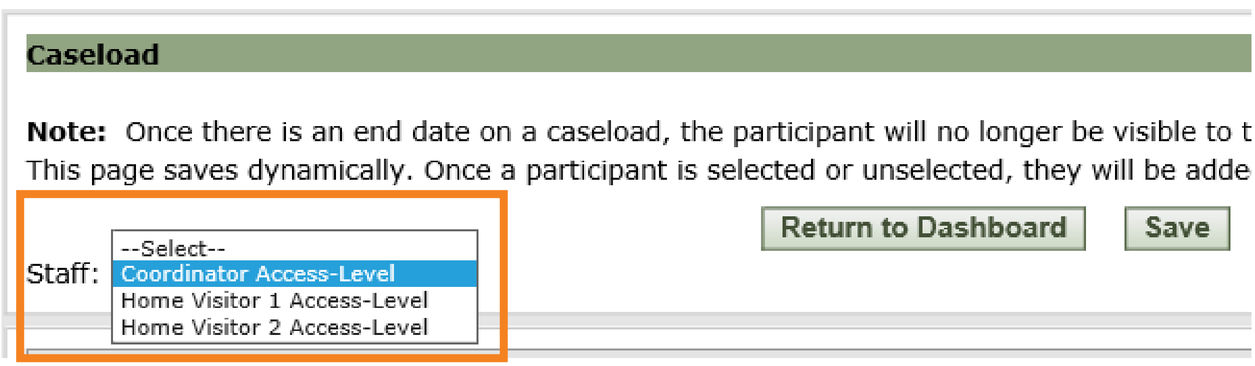
CASELOAD MANAGEMENT: MANAGE STAFF CASELOADS

1. IN THE FAMILIES PROGRAM: Scroll to Manage Staff Caseloads at the bottom of the My Dashboard screen (below the blue data entry buttons and above My Caseload) under My Dashboard

2. Click the Add link



3. Select the name of the caseworker from the dropdown



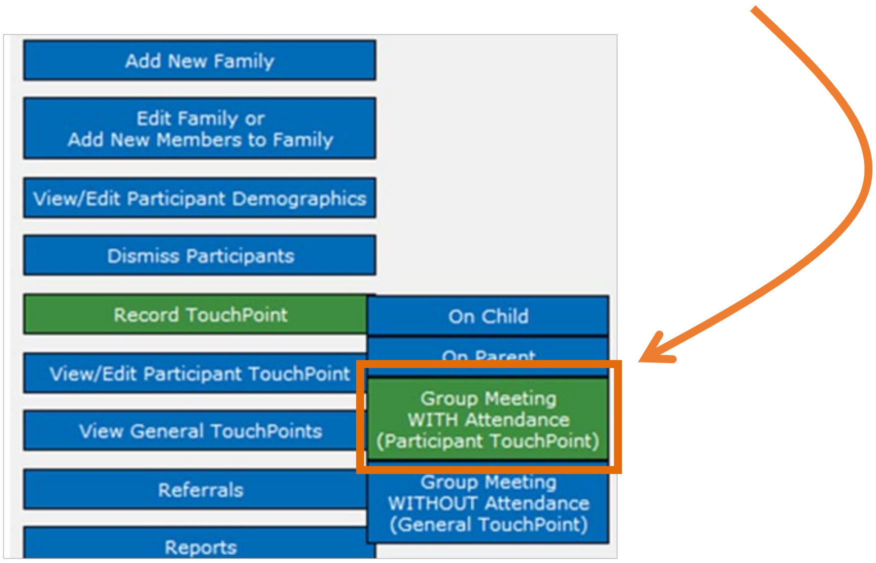
4. Follow Add Participant to My Caseload steps 4-10 until all appropriate families and participants are assigned to the caseworker

5. Repeat steps 1-4 for each staff working with families until ALL participants in the list are assigned

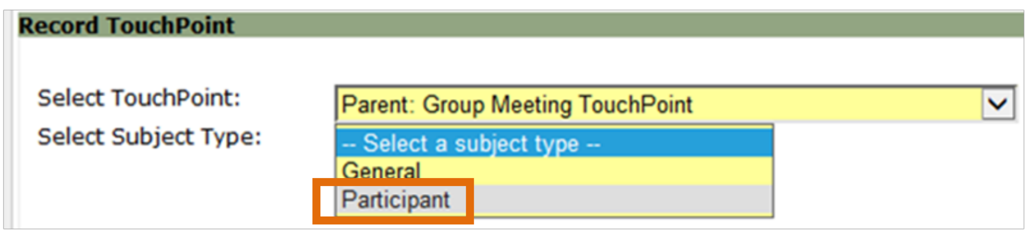
RECORD TOUCHPOINT (COORDINATORS)

RECORD NEW GROUP MEETING TOUCHPOINT WITH ATTENDANCE (PARTICIPANT TOUCHPOINT)

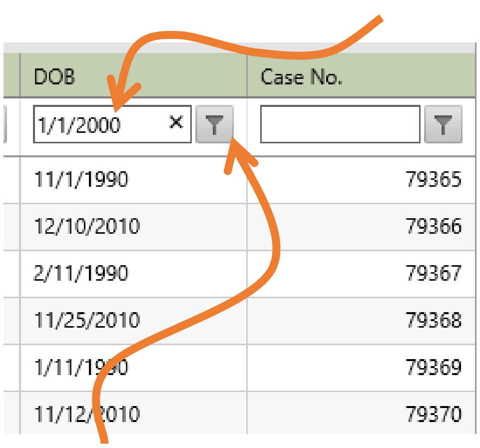
1. Under My Dashboard IN THE FAMILIES PROGRAM, move the mouse arrow over Record TouchPoint
2. Then move the mouse arrow over and click on Group Meeting WITH Attendance (Participant TouchPoint)



3. In the Select Subject Type dropdown click on Participant

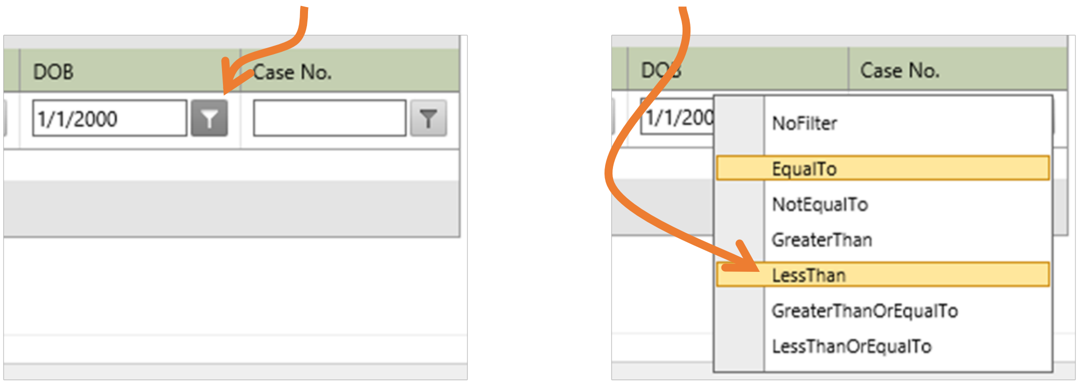


4. Limit the list to HIPPY adults by typing 1/1/2000 in the DOB filter

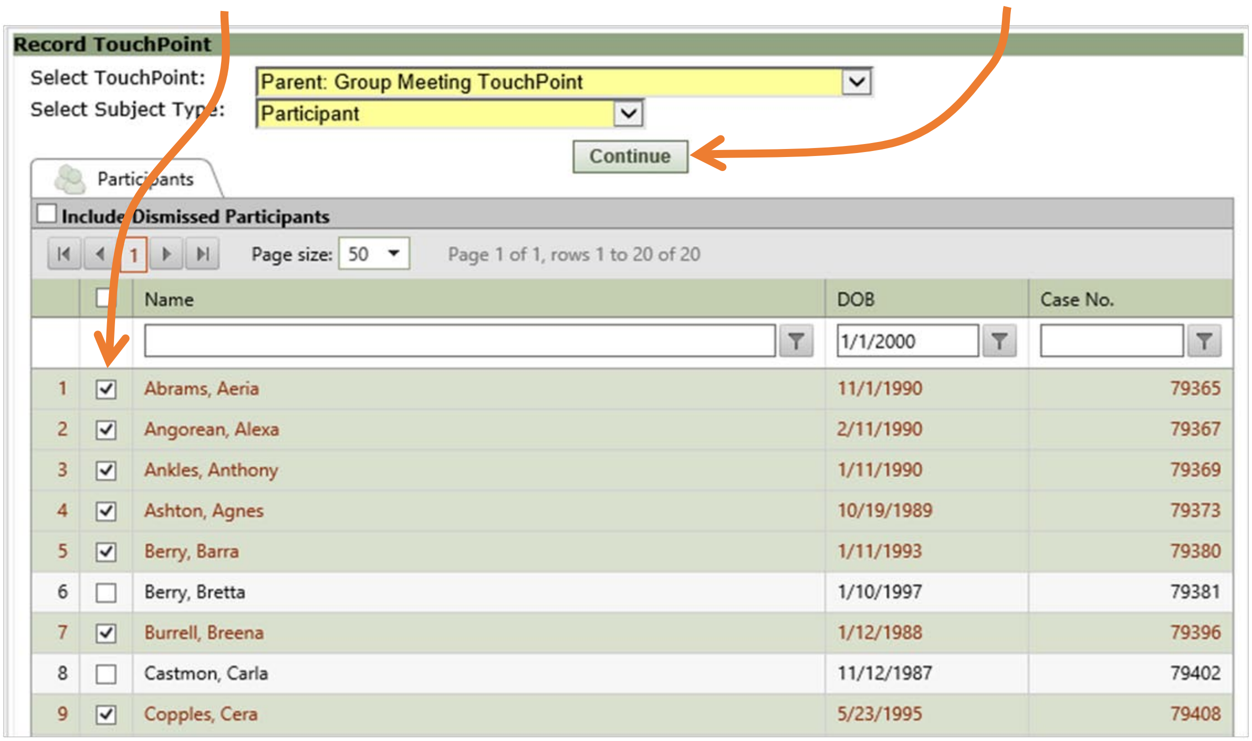


5. Click the filter next to the text field

6. After the names clear, click the filter next to the text AGAIN and select LessThan

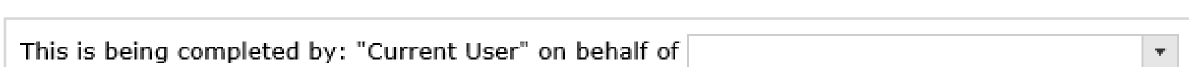


7. Check the box next to **ALL** HIPPY adult client's names who **ATTENDED** the group meeting and click the Continue button



8. In top green box enter <u>date of group meeting</u>, (not entered into the system)

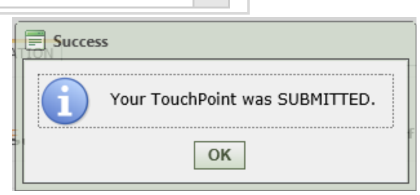
9. Use the on behalf of dropdown <u>ONLY</u> when someone other than the coordinator is entering the data



10. Answer all required questions and any optional or notes as needed

    NOTE: *Remember any items marked with an asterisk are required fields*

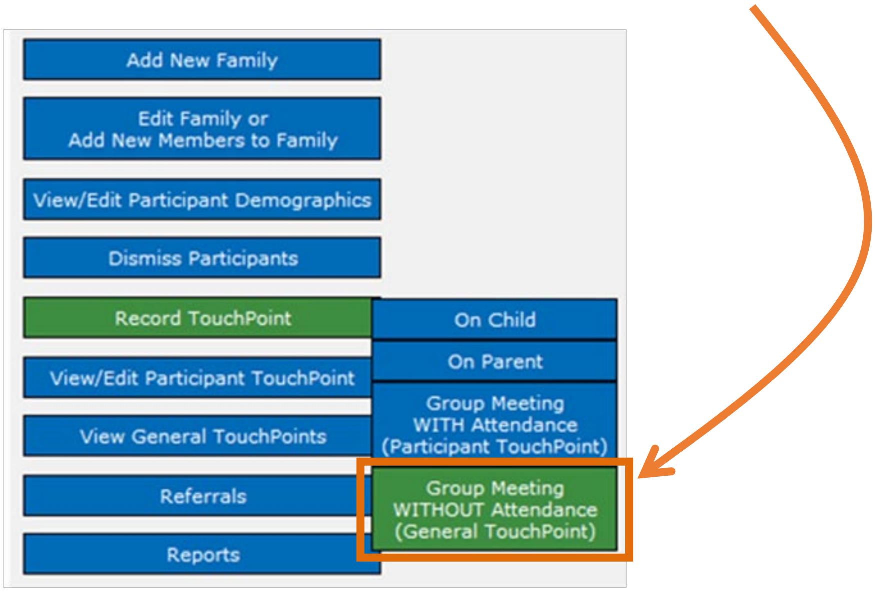
11. Click the Save button at bottom of page and OK in the submittal confirmation box



Return to Table of Contents

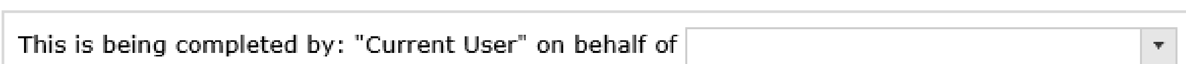
RECORD NEW GROUP MEETING TOUCHPOINT WITHOUT ATTENDANCE (GENERAL TOUCHPOINT)

1. Under My Dashboard IN THE FAMILIES PROGRAM, move the mouse arrow over Record TouchPoint
2. Then move the mouse arrow over and click on Group Meeting WITHOUT Attendance (General TouchPoint)



3. In top green box enter <u>date of group meeting</u>, (not entered into the system)

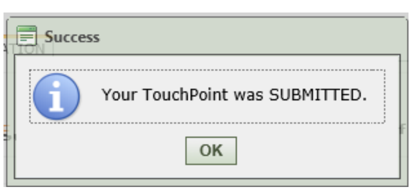
4. Use the on behalf of dropdown <u>ONLY</u> when someone other than the coordinator is entering the data



5. Answer all required questions and any optional or notes as needed

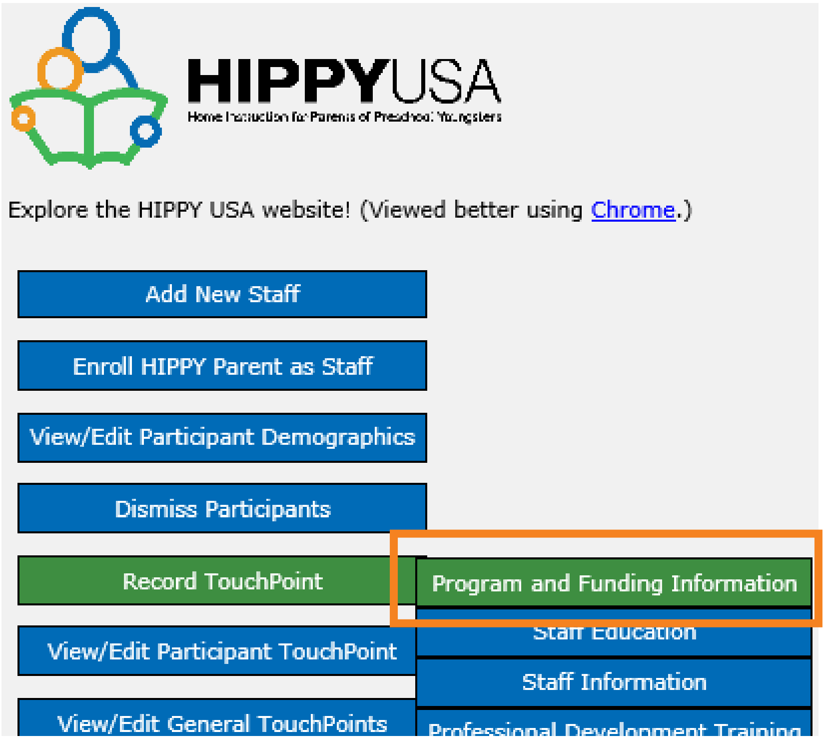
   NOTE: *Remember any items marked with an asterisk are required fields*

6. Click the Save button at bottom of page and OK in the submittal confirmation box



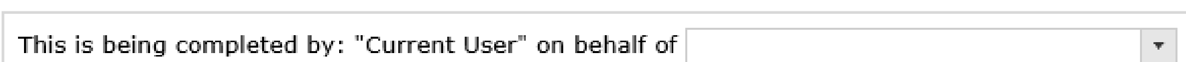
RECORD NEW PROGRAM AND FUNDING INFORMATION TOUCHPOINT (GENERAL TOUCHPOINT)

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over and click on Program and Funding Information



3. In top green box enter date current program year began, (not entered into the system)

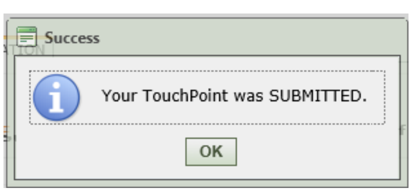
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data



5. Answer all required questions and any optional or notes as needed

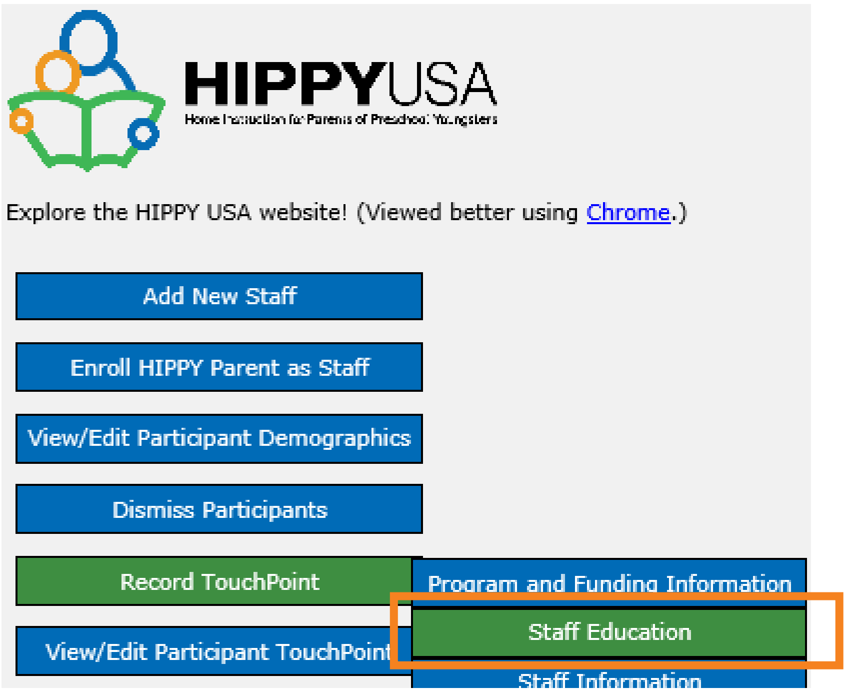
   NOTE: *Remember any items marked with an asterisk are required fields*

6. Click the Save button at bottom of page and OK in the submittal confirmation box



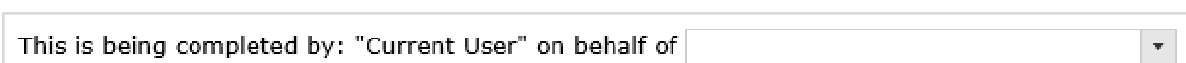
RECORD NEW STAFF EDUCATION TOUCHPOINT

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over and click on Staff Education



3. In top green box enter date form was filled out, (not entered into the system)

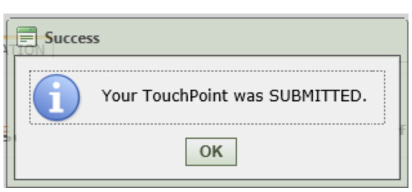
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data



5. Answer all required questions and any optional or notes as needed

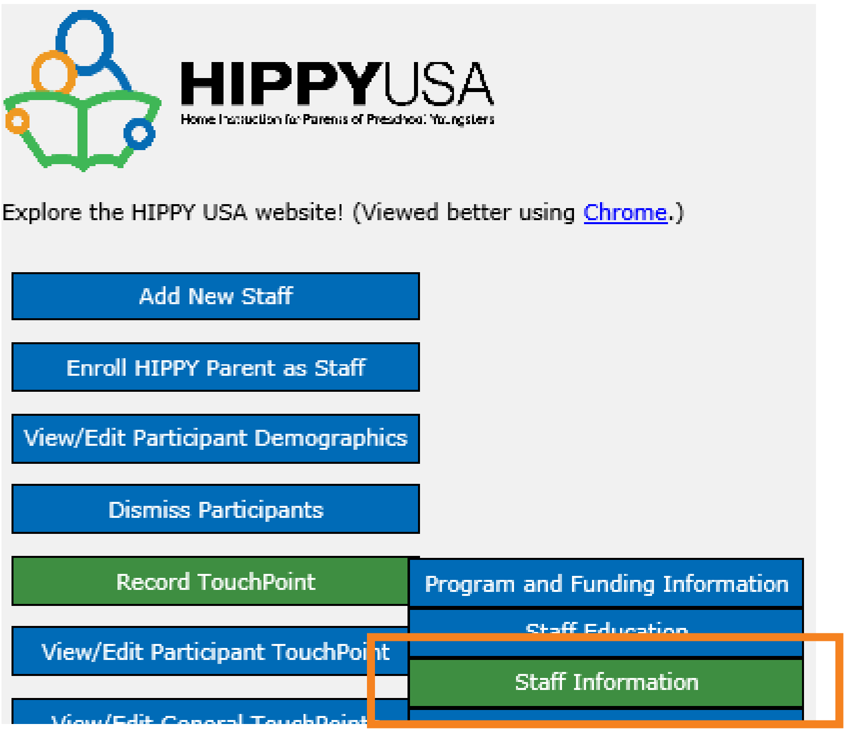
   NOTE: *Remember any items marked with an asterisk are required fields*

6. Click the Save button at bottom of page and OK in the submittal confirmation box



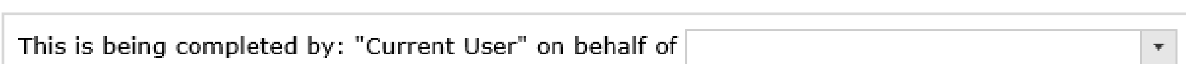
RECORD NEW STAFF INFORMATION TOUCHPOINT

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over and click on Staff Information



3. In top green box enter date form was filled out, (not entered into the system)

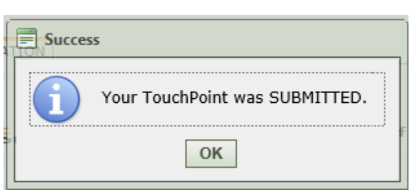
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data



5. Answer all required questions and any optional or notes as needed

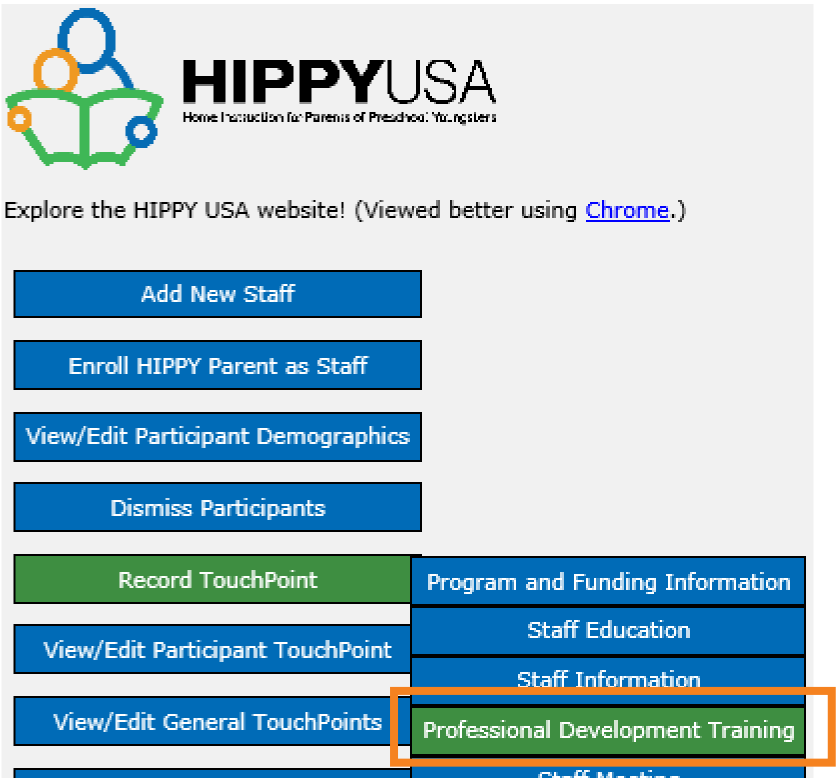
   NOTE: *Remember any items marked with an asterisk are required fields*

6. Click the Save button at bottom of page and OK in the submittal confirmation box



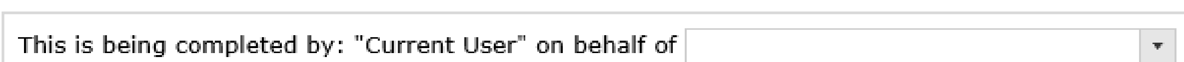
RECORD NEW PROFESSIONAL DEVELOPMENT TOUCHPOINT

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over and click on Professional Development Training



3. In top green box enter <u>date of professional development training</u>, (not entered into the system)

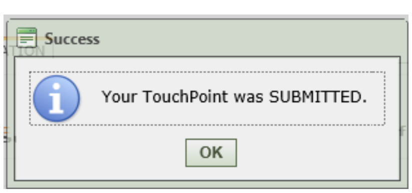
4. Use the on behalf of dropdown <u>ONLY</u> when someone other than the coordinator is entering the data



5. Answer all required questions and any optional or notes as needed

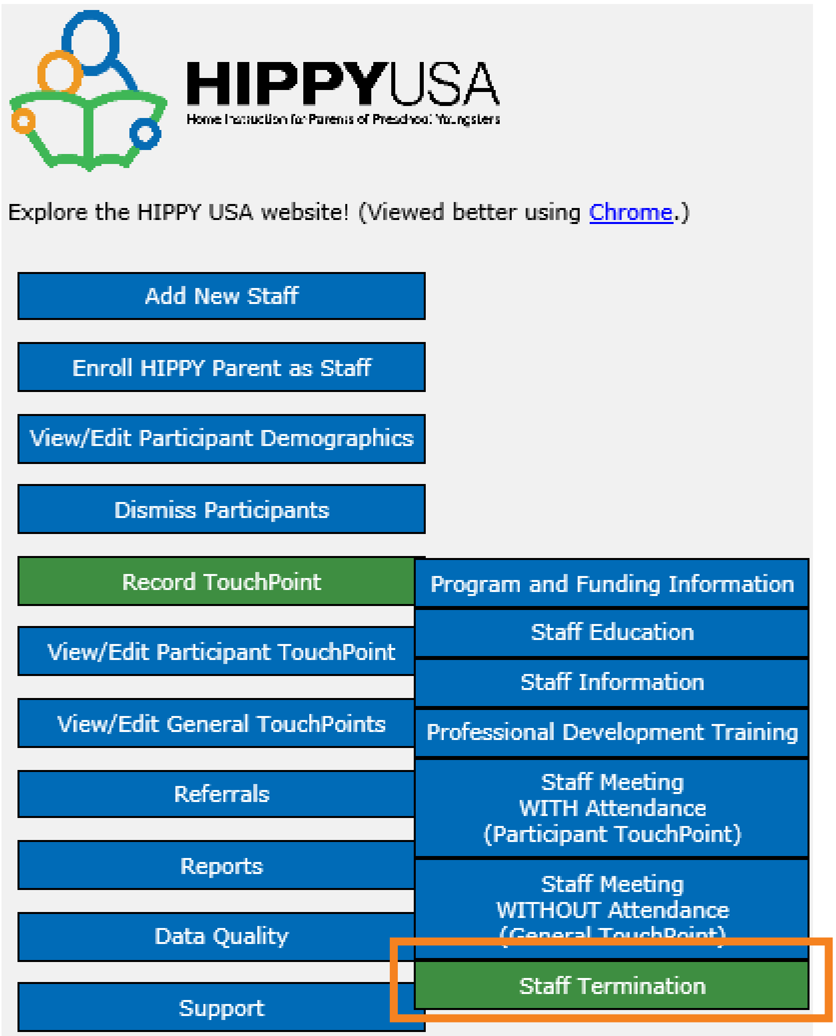
   NOTE: *Remember any items marked with an asterisk are required fields*

6. Click the Save button at bottom of page and OK in the submittal confirmation box



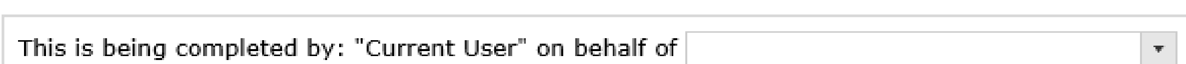
RECORD NEW STAFF TERMINATION TOUCHPOINT

1. Move the mouse arrow over Record TouchPoint under My Dashboard
2. Then move the mouse arrow over and click on Staff Termination



3. In top green box enter <u>date the staff member left HIPPY employment</u>, (not entered into the system)

4. Use the on behalf of dropdown <u>ONLY</u> when someone other than the coordinator is entering the data



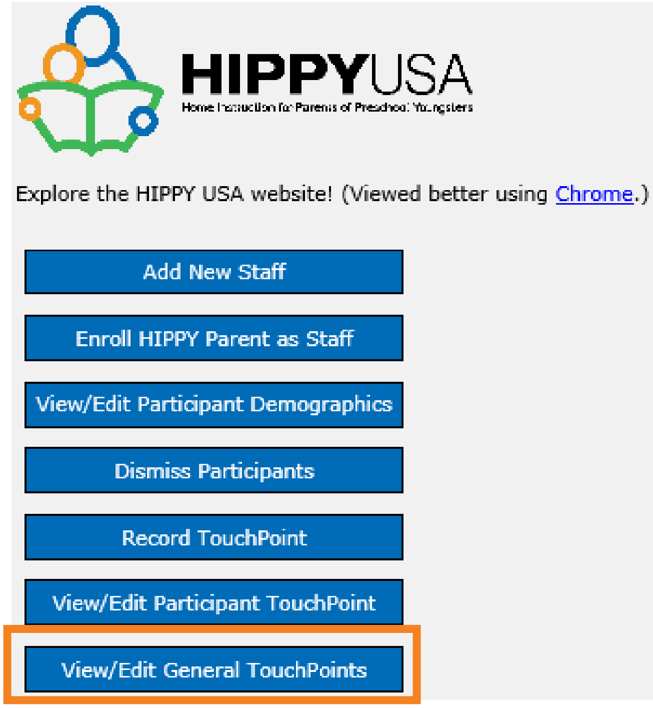
5. Answer all required questions and any optional or notes as needed

   NOTE: *Remember any items marked with an asterisk are required fields*

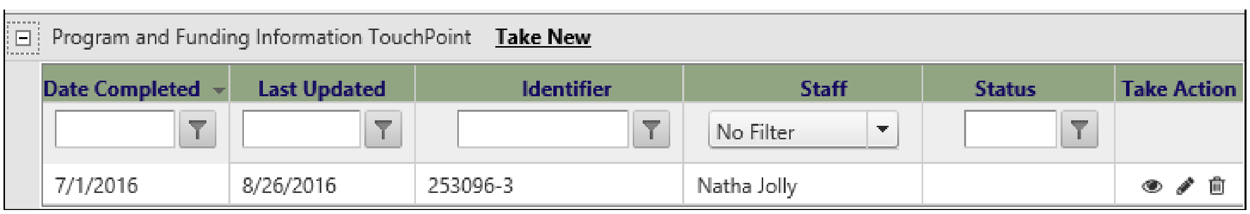
6. Click the Save button at bottom of page and OK in the submittal confirmation box

VIEW/EDIT GENERAL TOUCHPOINT

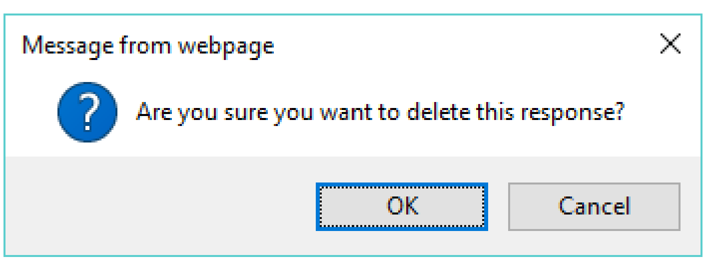
1. Click on View/Edit General TouchPoint under My Dashboard



2. Click next to the TouchPoint that need to be viewed or edited
3. Use the Date Completed (or Identifier if more than one TouchPoint was taken on a single date) to select the correct TouchPoint



4. To view the TouchPoint: Click on the far right under Take Action
5. To edit the TouchPoint: Click on the far right under Take Action, make corrections and click the Save button
6. To delete the TouchPoint: Click on the far right under Take Action and OK

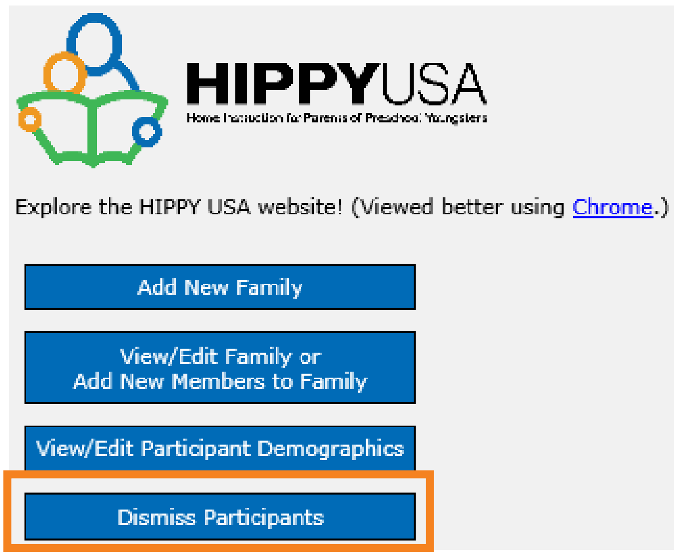


Return to Table of Contents

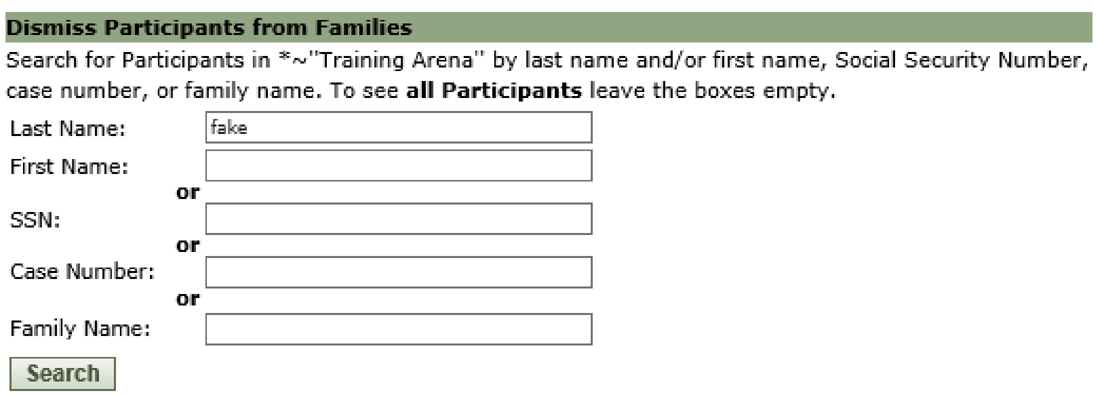
DISMISS PARTICIPANTS

DISMISSING A SINGLE PARTICIPANT

1. Click on Dismiss Participants under My Dashboard



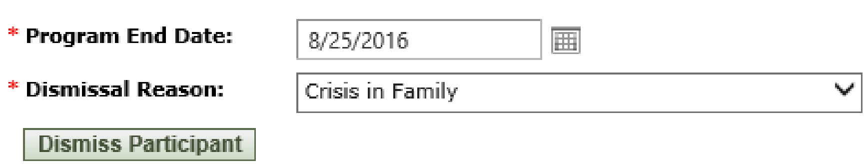
2. Search for the participant by last name



3. Check the box to the left of the participant's name

☐	Participant	Age	Case Number	DOB	SSN
☑	Grandmamma Fake	68	80489	10/8/1947	

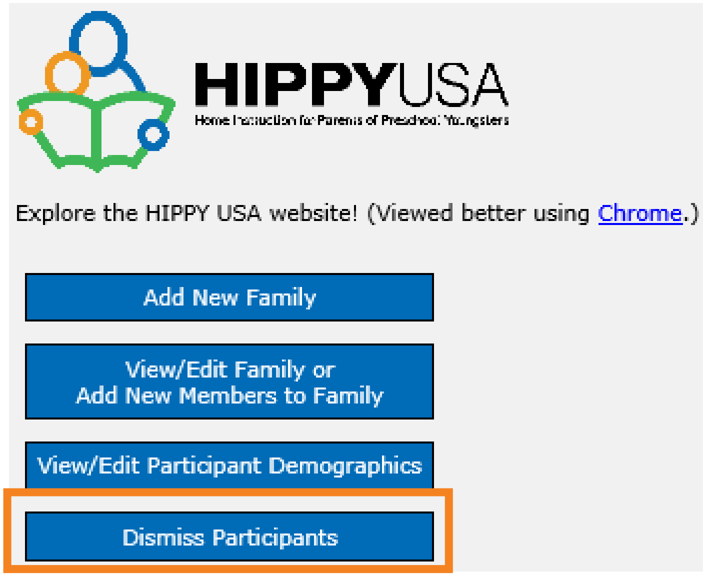
4. Enter the date and reason for dismissal



5. Click on the Dismiss Participant button

DISMISSING A FAMILY

1. Under My Dashboard IN THE FAMILIES PROGRAM, click on Dismiss Participants



2. Search by the family name using the Family search box and click + to see all the family members
3. Check the box to the left of the family name to select all of the family members

Family Name: Adult Fake Family

☑	Family Members	DOB	Age	Case Number	Relationship	SSN
☑	Adult Fake	8/19/1985	31	80484	Adult	
☑	Child Fake	9/18/2013	2	80485	Child	

4. Click on the circle next to Dismiss select participants with same program end dates and click Continue

○ Dismiss selected participants with different program end dates
◉ Dismiss selected participants with the same program end dates
Continue

5. Enter the Program End Date and select a Dismissal Reason

* **Program End Date:** 8/25/2016
* **Dismissal Reason:** Crisis in Family

Name
Adult Fake
Child Fake

Dismiss Participants

6. Click the Dismiss Participants button