



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.



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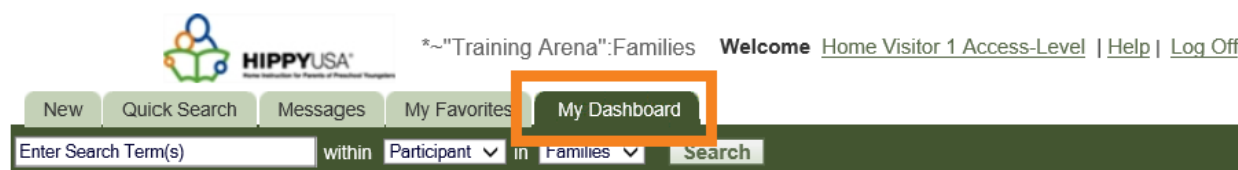


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HOME VISITORS

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)

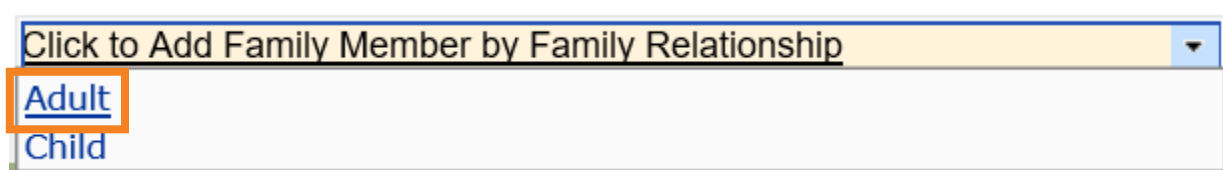
1. [Add New Child\(ren\) to Existing Family \(HIPPY Application page 1\)](#)
2. [Add Participants to My Caseload](#)
3. [View/Edit Participant Demographics on parent and child \(HIPPY Application page 1\)](#)
4. [Record New Adult Education TouchPoint \(HIPPY Application page 2\)](#)
5. [Record New Adult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

Add Family

* Indicates Required Field

Family Member

Head of Household:	<input checked="" type="checkbox"/>	(Only one Head of Household may be selected for this Family)
Relationship:	Adult	
Case Number:	<input type="text"/>	
Alert:	<input type="text"/>	

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

- Click on the **WORD** [Child](#) in the **Click to Add Family Member by Family Relationship** dropdown below Participant Notes

Participant Notes:

Click to Add Family Member by Family Relationship

Adult

Child

- Check the Copy values from the first Family Member box

Family Member

☒ Copy values from the first Family Member

Head of Household: ☐ (Only one Head of Household may be selected for this Family)

Relationship: Child

- Answer all required questions and any optional or notes as needed

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

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

Program Enrollment Information:

* Family Member	* Program	* Start Date	Take Action
Everyone	--Select-- Families	<input type="text"/>	Delete Row

Add Enrollment

- Enter the Start Date

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

- Click the Save button at bottom of page

Take Action

[Delete Row](#)

Save

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
<input checked="" type="radio"/>	Add as New				
<input type="radio"/>	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:

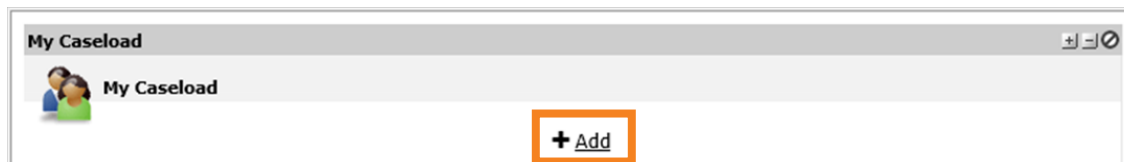
	Name	SSN	DOB	Status	Program
<input type="radio"/>	Add as New				
<input checked="" type="radio"/>	1. Susie Queue		8/19/1990	Not Enrolled	

Cancel

Save

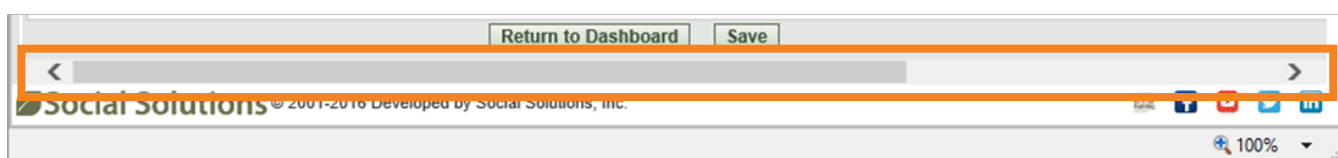
CASELOAD MANAGEMENT: ADD PARTICIPANTS TO MY CASELOAD

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

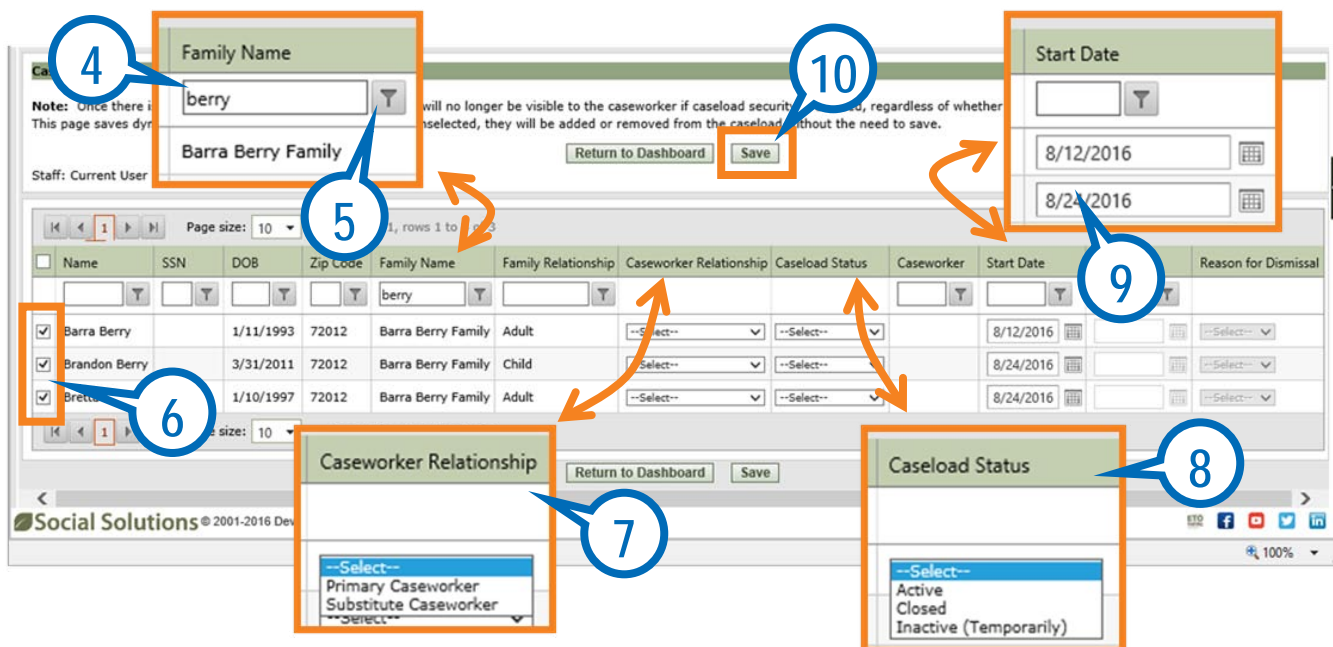


NOTE: If coordinators manage home visitor caseloads, use [Manage Staff Caseloads](#) instead of the My Caseload.

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



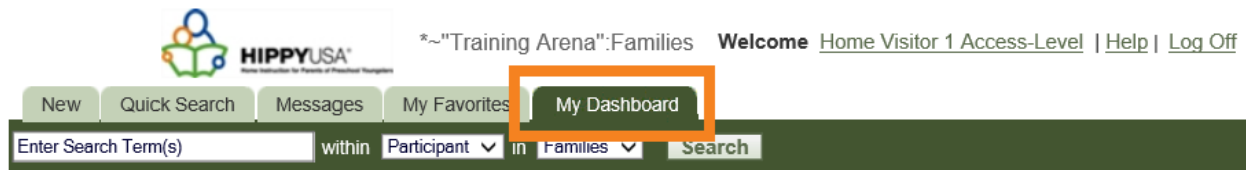
The screenshot shows the 'Add Participant' form with the following callouts:

- 4:** Family Name filter text field containing 'berry'.
- 5:** Filter icon (funnel) next to the Family Name text field.
- 6:** Checkboxes for selecting participants (Barra Berry, Brandon Berry, Brett Berry).
- 7:** Caseworker Relationship dropdown menu showing 'Primary Caseworker'.
- 8:** Caseload Status dropdown menu showing 'Active'.
- 9:** Start Date dropdown menu showing '8/24/2016'.
- 10:** Save button at the bottom of the form.

Name	SSN	DOB	Zip Code	Family Name	Family Relationship	Caseworker Relationship	Caseload Status	Caseworker	Start Date	Reason for Dismissal
<input checked="" type="checkbox"/> Barra Berry		1/11/1993	72012	Barra Berry Family	Adult	--Select--	--Select--		8/12/2016	--Select--
<input checked="" type="checkbox"/> Brandon Berry		3/31/2011	72012	Barra Berry Family	Child	--Select--	--Select--		8/24/2016	--Select--
<input checked="" type="checkbox"/> Brett Berry		1/10/1997	72012	Barra Berry Family	Adult	--Select--	--Select--		8/24/2016	--Select--

CASELOAD MANAGEMENT: LOCATE ALL UNASSIGNED PARTICIPANTS

1. Click the My Dashboard tab

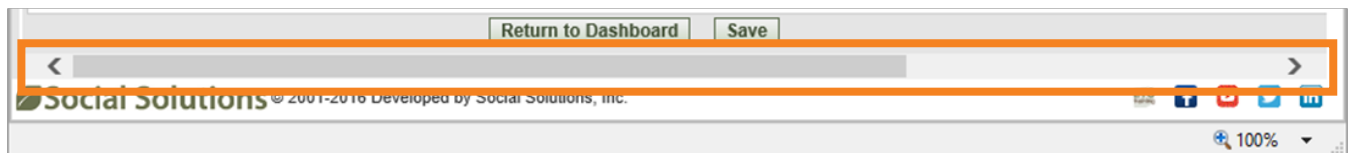


2. Scroll to the My Caseload or Manage Staff Caseloads box at the bottom of the My Dashboard screen (below the blue data entry buttons)
3. Click the Add link

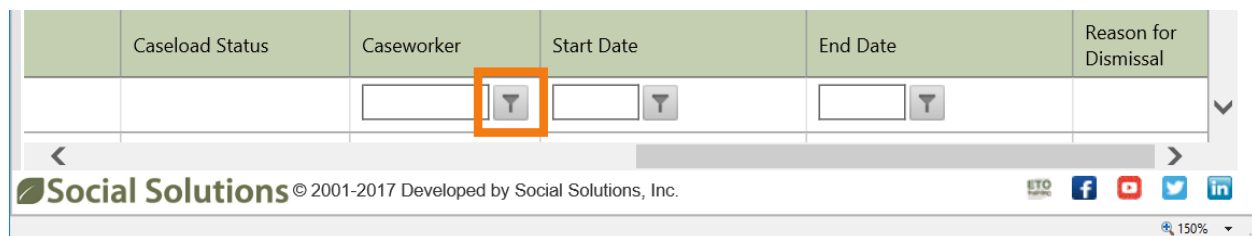


NOTE: If coordinators manage home visitor caseloads, use Manage Staff Caseloads instead of My Caseload.

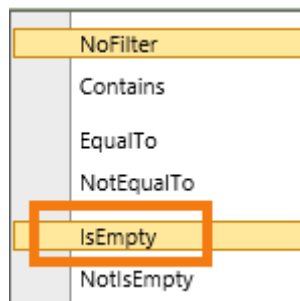
4. Scroll to the right with the scrollbar at the bottom to view all data fields



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

View/Edit Families

Search by (partial) **Family Name**, or (partial) **Family Member Last Name**:

To see **all Families** leave the box empty.

☐ **Include Disabled Families**

	Family Name	Family Member Count
<input type="button" value="+"/>	Adult Fake Family	2

An orange box highlights the search input field containing 'fake' and the 'Search' button. An orange arrow points from the '+' button in the table row to the search input field.

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

<input type="checkbox"/> Include Disabled Families			
	Family Name		Family Member Count
<input type="button" value="-"/>	1	Adult Fake Family	2
Family Members		Age	DOB
Fake, Adult		31 years	8/19/1985
Fake, Child		2 years	9/18/2013

The table shows the details for the 'Adult Fake Family'. The first row of the table body is highlighted with an orange box. The table has columns for Family Members, Age, and DOB.

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

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. In the [Click to Add Family Member by Family Relationship](#) dropdown, click on the word Child

Click to Add Family Member by Family Relationship ▼

Adult
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

*** Program**

--Select--
▼

*** Start Date**

▼
▼

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

Take Action

[Delete Row](#)

> Save

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: 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: Go

	Name	Family Name
<input checked="" type="checkbox"/>	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

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	<div style="border: 1px solid black; padding: 2px;"> --Select-- Adult Child </div>	Select as Head Delete

Add New Members to Family: Adult Fake Family [Search for Others...](#) | [Add New Family Member](#)

EDIT A FAMILY NAME

- Complete [View/Edit Family](#) steps 1-3 and click the Edit Family Name 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

Add New Members to Family: Adult Fake Family [Search for Others...](#) | [Add New Family Member](#)

- Edit the family name and click the Save Family Name button

View/Edit Family: Adult Fake Family

Adult Fake Family

Save Family Name
De Fa

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*

View/Edit Families

Search by (partial) **Family Name**, or (partial) **Family Member Last Name**:

To see **all Families** leave the box empty.

[View Participants Not Currently in a Family](#)

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

Participants Not in a Family

Click on a participant's name to instantly create a family. The participant's name will be used for the family name, for example, clicking on John Fake would create the John Fake Family.

Name	SSN	Case Number	DOB
fake <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="▼"/>	<input type="text"/> <input type="button" value="▼"/>
Grandmamma Fake		80489	10/8/1947

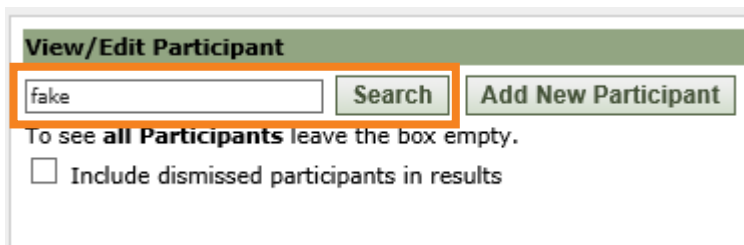
VIEW/EDIT PARTICIPANT DEMOGRAPHICS

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



The screenshot shows the 'View/Edit Participant' search form. It has a green header bar with the title 'View/Edit Participant'. Below the header is a search box containing the text 'fake', a 'Search' button, and an 'Add New Participant' button. The 'Search' button is highlighted with an orange rectangular box. Below the search box is a message: 'To see **all Participants** leave the box empty.' and a checkbox labeled 'Include dismissed participants in results'.

3. Click the participant's name

Name	Case Number	Adult or Child?
<input type="text"/> 	<input type="text"/> 	<input type="text"/> 
Fake, Adult	80484	Adult
Fake, Child	80485	Child



1


 Page size:
 2 items in 1 pages

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



The screenshot shows the 'Participant Notes' section. It has a label 'Participant Notes' and a large text area for notes. Below the text area is a 'Save' button, which is highlighted with an orange rectangular box.

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

Audit Report

Program History

View Adult Fake's Dashboard

Status: **Currently Enrolled**

Case Number

80484

Alert

Adult or Child? ? *

Adult

First Name *

Adult

Last Name *

Fake

Address 1 *

new address

Edit Participant Address History

3. Click OK to leave the page

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

Confirm message from web page


?


If you leave this page, your changes will not be saved.
Press Continue to lose your changes or Cancel to stay on the current page.

OK



Cancel

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

Address History for Fake, Adult					
Addresses					
Take Action		Date From	Date To	Value From	Status
	1.	8/19/2016		here , Little Rock, AR 72202	Current
Cancel +New					


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

Address Information	
* Date From:	8/19/2016 
Date To:	
Address 1:	there
Address 2:	
Zip Code:	72202 -
Cancel > Save	

4. Click [Cancel](#) to return to the demographics page

Address History for Fake, Adult					
Addresses					
Take Action		Date From	Date To	Value From	Status
	1.	8/19/2016		there , Little Rock, AR 72202	Current
Cancel +New					

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


Address History for Fake, Adult


Addresses					
Take Action		Date From	Date To	Value From	Status
	1.	8/19/2016		there , Little Rock, AR 72202	Current

 [Cancel](#) [+New](#)

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

Address Information

* Date From: 

Date To: 

Address 1:


Address 2:


Zip Code: -

[Cancel](#) [> Save](#)

4. Click [+New](#) to add the new address
5. Enter the date of move into the Date From box

Address Information

* **Date From:** 

Date To: 



Address 1:

Address 2:

Zip Code: -

[Cancel](#) [> Save](#)

6. Add the street address and zip code
7. Click the Save button
8. Click [Cancel](#) to return to the demographics page

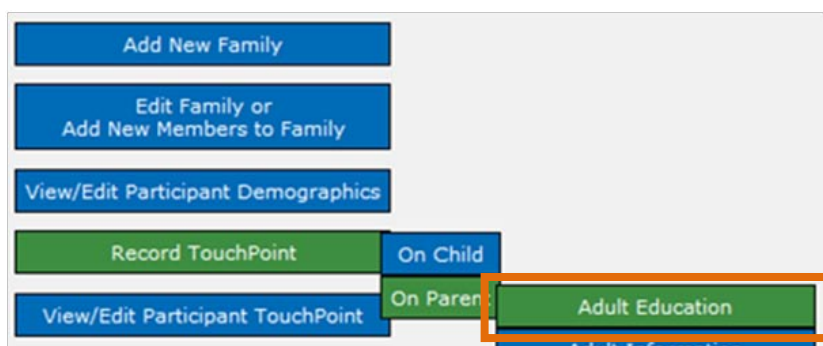
Addresses					
Take Action		Date From	Date To	Value From	Status
	1.	8/25/2016		somewhere else , Little Rock, AR 72202	Current
	2.	8/19/2016	8/25/2016	there , Little Rock, AR 72202	Old

[Cancel](#) [+New](#)

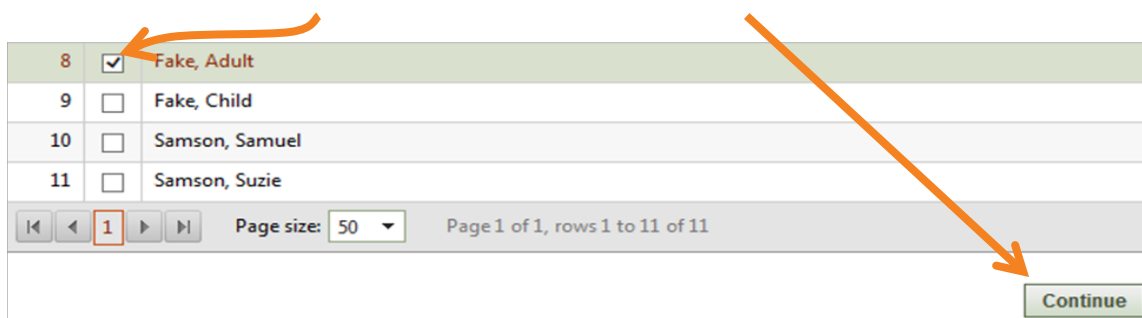
RECORD TOUCHPOINT (HOME VISITORS)

RECORD NEW ADULT EDUCATION TOUCHPOINT (HIPPLY 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 date form was filled out, (not entered into the system)

Parent: Adult Education TouchPoint (also for Staff) for Adult Fake on

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

This is being completed by: "Current User" on behalf of

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

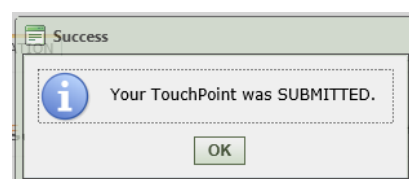
☒ HIPPLY Parent
☐ HIPPLY Staff Member

☒ HIPPLY Parent
☒ HIPPLY Staff Member

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

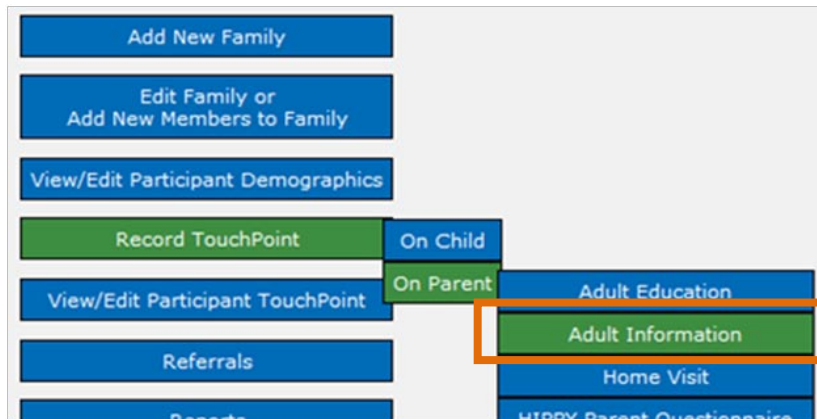
NOTE: Remember any items marked with an asterisk are required fields

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

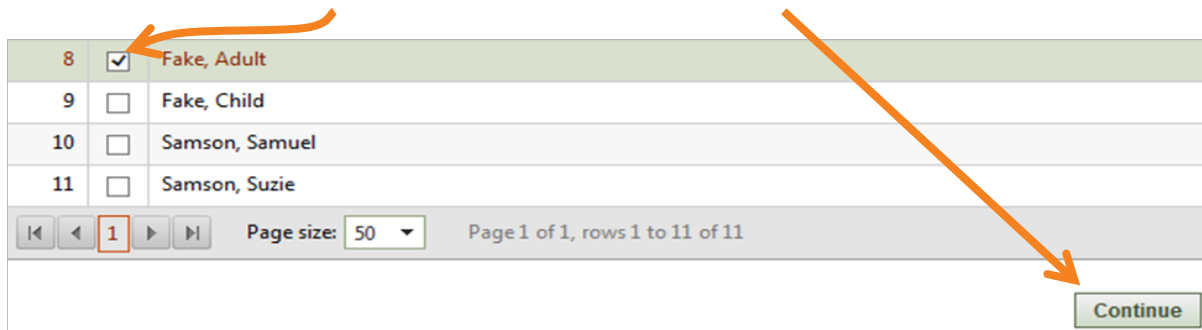


RECORD NEW ADULT INFORMATION TOUCHPOINT (HIPPY APPLICATION PAGE 2)

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



8	<input checked="" type="checkbox"/>	Fake, Adult
9	<input type="checkbox"/>	Fake, Child
10	<input type="checkbox"/>	Samson, Samuel
11	<input type="checkbox"/>	Samson, Suzie

Page size: 50 Page 1 of 1, rows 1 to 11 of 11

Continue

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

Parent: Adult Information TouchPoint for Adult Fake on

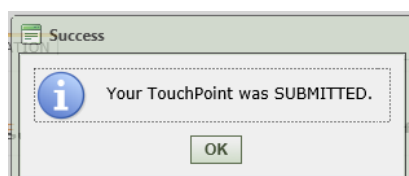
6. Use the on behalf of dropdown ONLY when someone other than the home visitor is entering the data

This is being completed by: "Current User" on behalf of

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

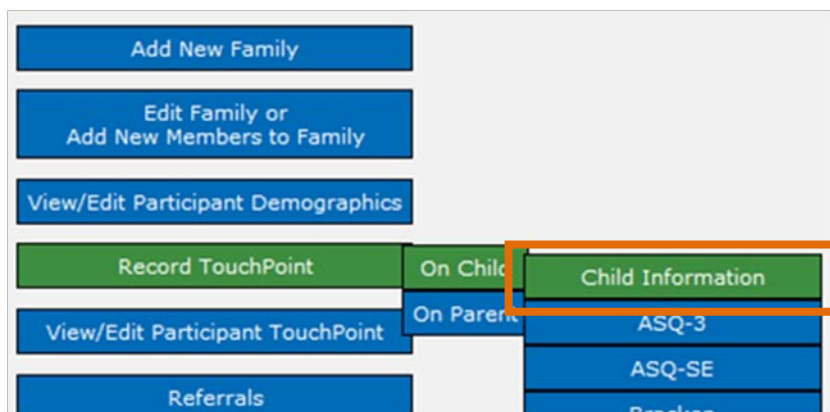
NOTE: Remember any items marked with an asterisk are required fields

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 date form was filled out, (not entered into the system)

Child: Information TouchPoint for Child Fake on

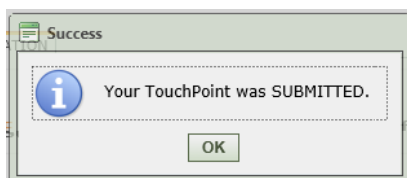
6. Use the on behalf of dropdown ONLY when someone other than the home visitor is entering the data

This is being completed by: "Current User" on behalf of

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

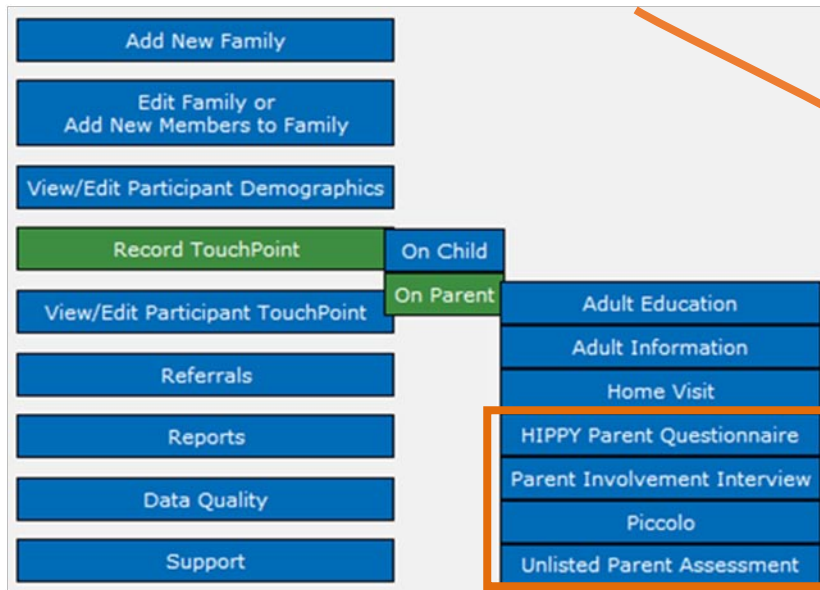
NOTE: Remember any items marked with an asterisk are required fields

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

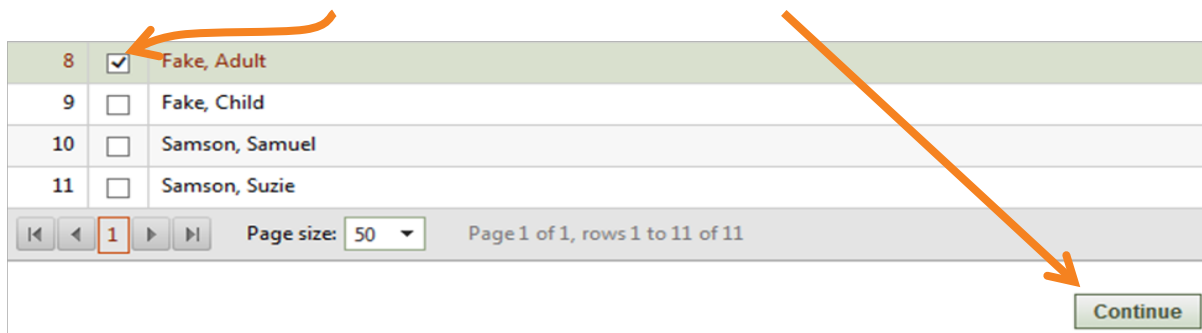


RECORD NEW PARENT ASSESSMENT TOUCHPOINT

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



<input checked="" type="checkbox"/>	8	Fake, Adult
<input type="checkbox"/>	9	Fake, Child
<input type="checkbox"/>	10	Samson, Samuel
<input type="checkbox"/>	11	Samson, Suzie

Page size: 50 Page 1 of 1, rows 1 to 11 of 11

Continue

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

Parent: Assessment TouchPoint, Parent Assessment for Adult Fake on

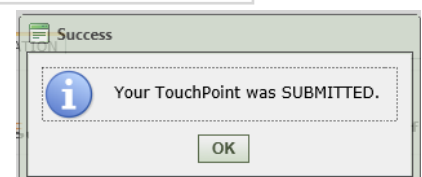
6. Use the on behalf of dropdown ONLY when someone other than the home visitor is entering the data

This is being completed by: "Current User" on behalf of

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

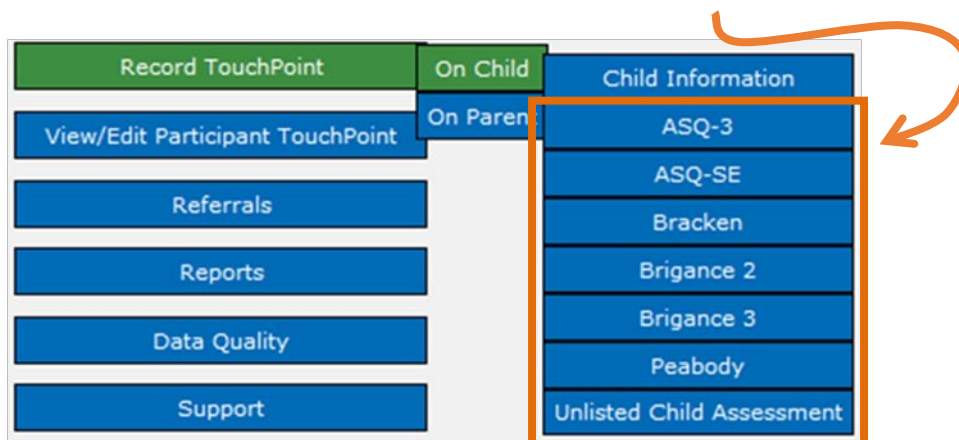
NOTE: Remember any items marked with an asterisk are required fields

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

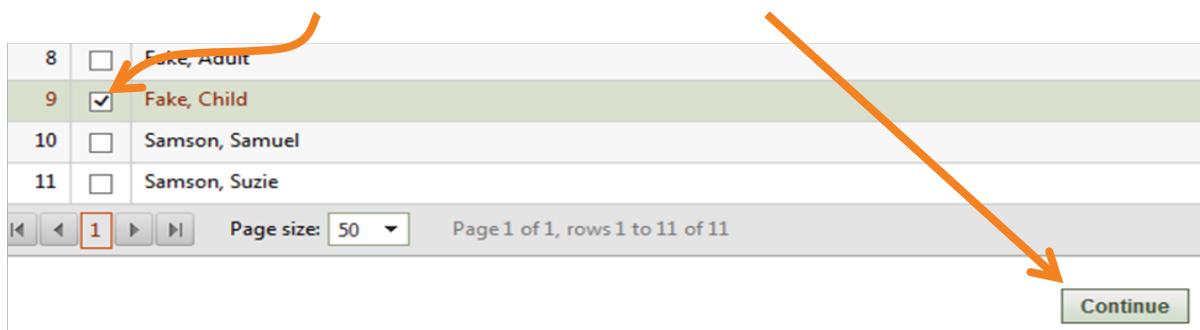


RECORD NEW CHILD ASSESSMENT TOUCHPOINT

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 date form was filled out, (not entered into the system)

Child: Assessment TouchPoint, Unlisted Child Assessment for Child Fake on

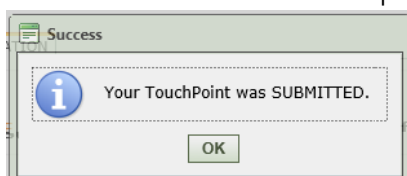
6. Use the on behalf of dropdown ONLY when someone other than the home visitor is entering the data

This is being completed by: "Current User" on behalf of

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

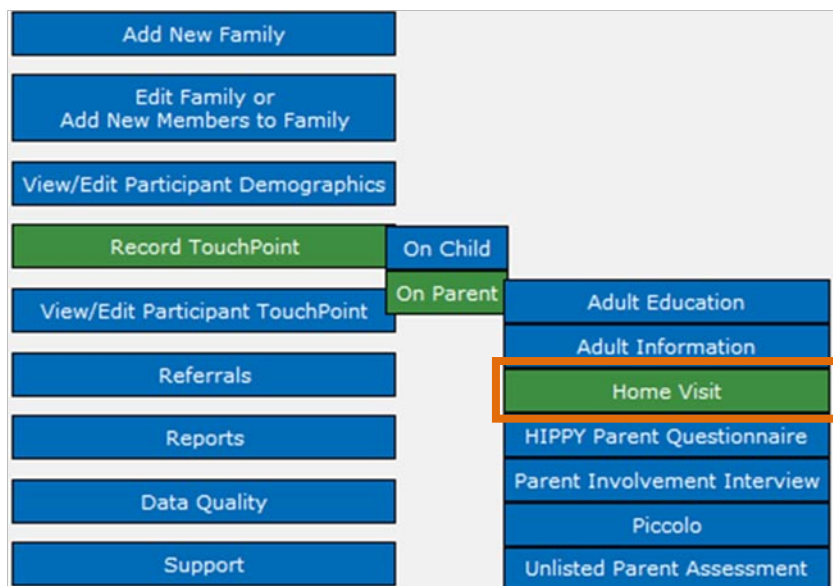
NOTE: Remember any items marked with an asterisk are required fields

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

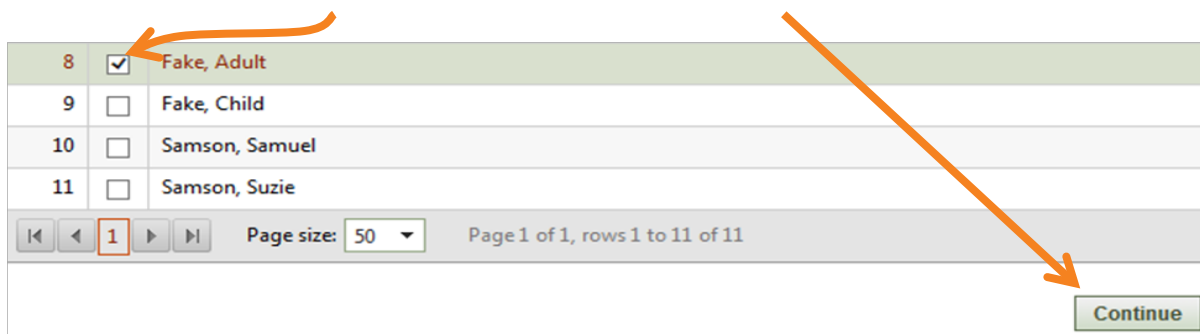


RECORD NEW HOME VISIT TOUCHPOINT

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



8	<input checked="" type="checkbox"/>	Fake, Adult
9	<input type="checkbox"/>	Fake, Child
10	<input type="checkbox"/>	Samson, Samuel
11	<input type="checkbox"/>	Samson, Suzie

Page size: 50 Page 1 of 1, rows 1 to 11 of 11

Continue

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

Parent: Home Visit TouchPoint for Adult Fake on

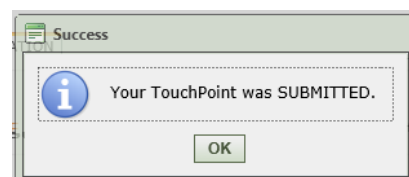
6. Use the on behalf of dropdown ONLY when someone other than the home visitor is entering the data

This is being completed by: "Current User" on behalf of

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

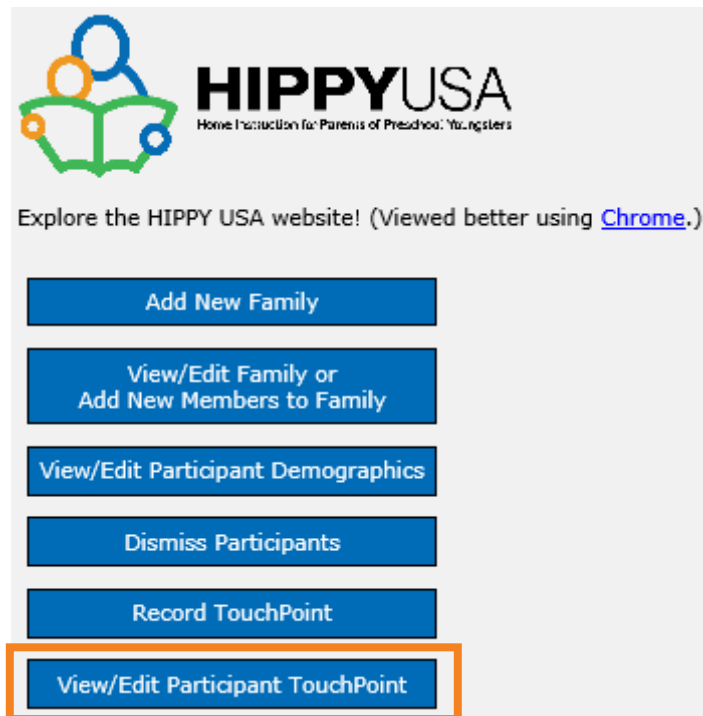
NOTE: Remember any items marked with an asterisk are required fields

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



VIEW/EDIT PARTICIPANT TOUCHPOINT

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



2. Search for the participant by last name

View Participant TouchPoints

To see **all Participants** leave the box empty.

☐ Include dismissed participants in results

3. Click on the participant's name


Name	Case Number	Adult or Child?
<input type="text" value=""/> <input type="button" value="Filter"/>	<input type="text" value=""/> <input type="button" value="Filter"/>	<input type="text" value=""/> <input type="button" value="Filter"/>
Fake, Adult	80484	Adult
Fake, Child	80485	Child
Fake, Grandmamma	80489	Adult
<input type="button" value="Previous"/> <input type="button" value="First"/> <input type="button" value="1"/> <input type="button" value="Next"/> <input type="button" value="Last"/>		
Page size: <input type="text" value="250"/> 3 items in 1 pages		

- Click  next to the TouchPoint that need to be viewed or edited
- 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
<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	No Filter 	<input type="text"/> 	
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		  

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

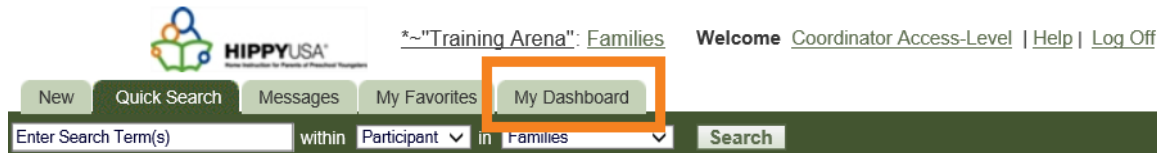
Message from webpage 

 Are you sure you want to delete this response?

COORDINATORS

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.

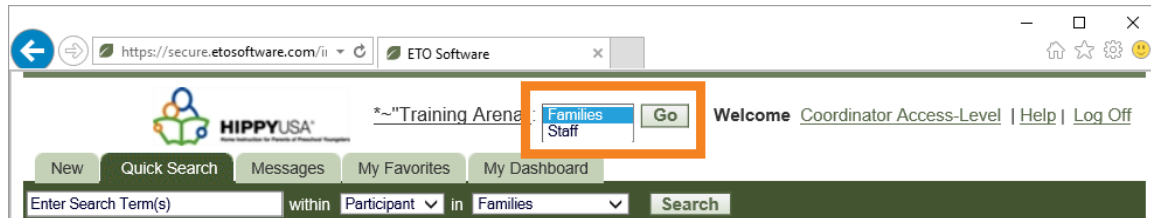


NAVIGATE ETO

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

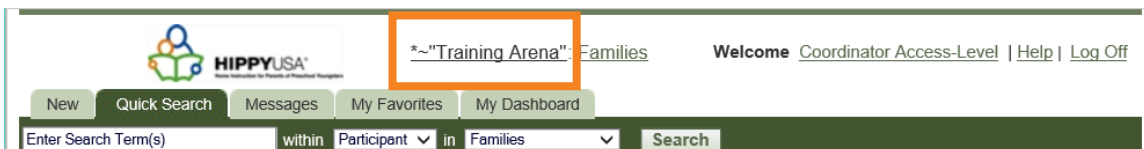


NOTE: If the program name disappears, click the refresh browser button at the top of the browser window

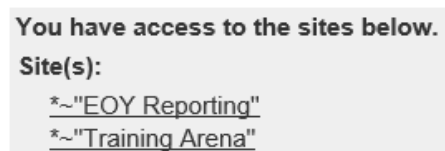
SWITCH ETO SITES

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



The screenshot shows a form titled 'Program Enrollment' with a green header bar. Below the header, there is a section with two items: 'Enroll in Program' with a checked checkbox, and 'Program Start Date *' with an empty text input field and a calendar icon to its right. Below this section is another green header bar that says 'Add New Participant'.

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

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

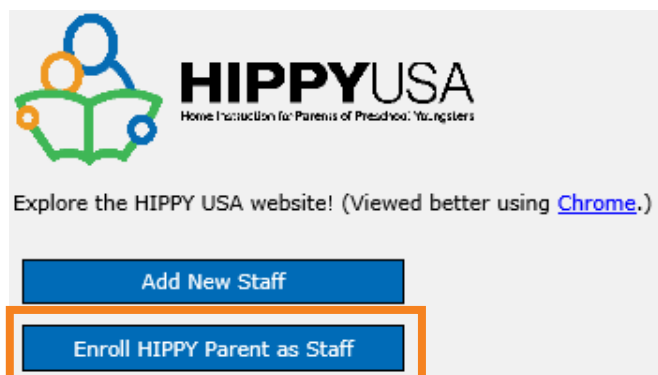
4. Click the Save button at bottom of page



The screenshot shows the bottom of the form. A green 'Save' button is centered at the bottom. Below the button is the footer, which includes the 'Social Solutions' logo, the text '© 2001-2016 Developed by Social Solutions, Inc.', and a row of social media icons for ETO, Facebook, YouTube, Twitter, and LinkedIn.

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

Enroll Participants into Staff

Search for Participants in *~"Training Arena" by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

Below are all Participants who are not currently enrolled in **Staff** with last name like 'fake'.

<input type="checkbox"/>	Participant	Age	Case Number	DOB	SSN
<input checked="" type="checkbox"/>	Adult Fake	31	80484	08/19/1985	
<input type="checkbox"/>	Child Fake	2	80485	09/18/2013	

* **Program Start Date:**

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

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.

	Name	Site	SSN	DOB
<input type="radio"/>	Susie Queue	*~"Training Arena"		08/19/1990

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

Duplicate Information

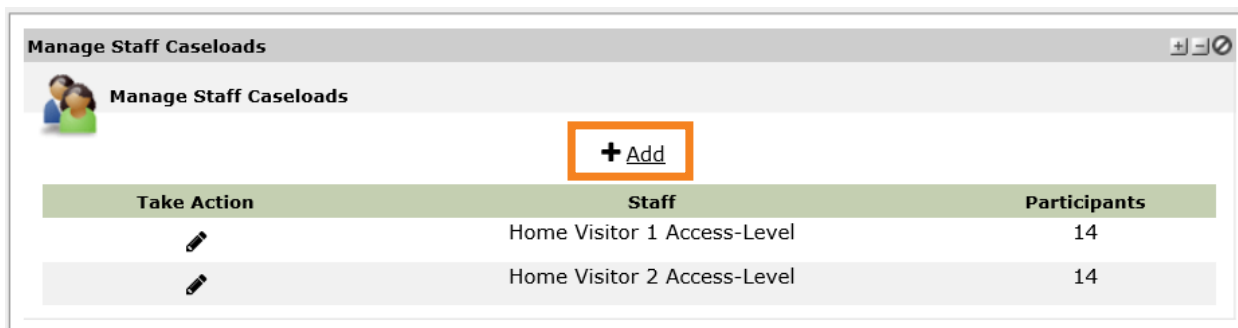
You are attempting to add a new participant with potential matches in the system. Duplicate Check data points are selected on the 'Manage Demographics' page.

There are potential matches for this new participant.

	Name	Site	SSN	DOB
<input checked="" type="radio"/>	Susie Queue	*~"Training Arena"		08/19/1990

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



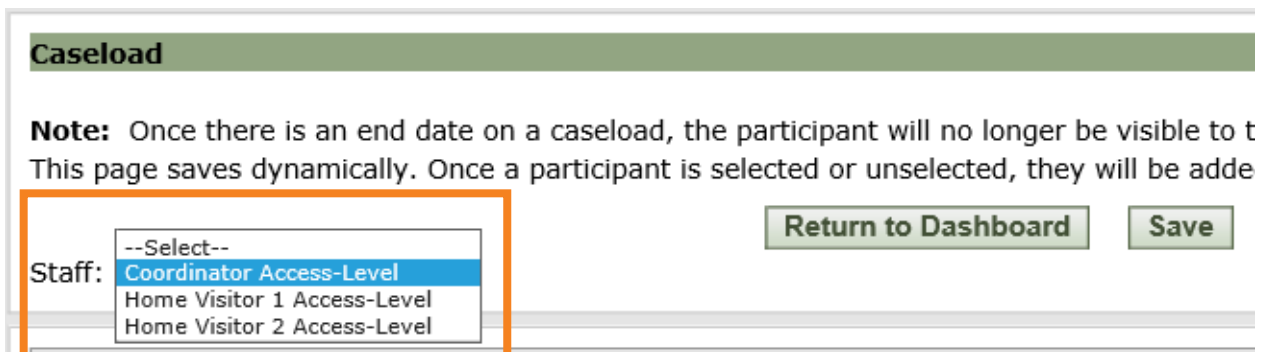
Manage Staff Caseloads

Manage Staff Caseloads

[+ Add](#)

Take Action	Staff	Participants
	Home Visitor 1 Access-Level	14
	Home Visitor 2 Access-Level	14

3. Select the name of the caseworker from the dropdown



Caseload

Note: Once there is an end date on a caseload, the participant will no longer be visible to t
This page saves dynamically. Once a participant is selected or unselected, they will be adde

Staff: --Select--
Coordinator Access-Level
Home Visitor 1 Access-Level
Home Visitor 2 Access-Level

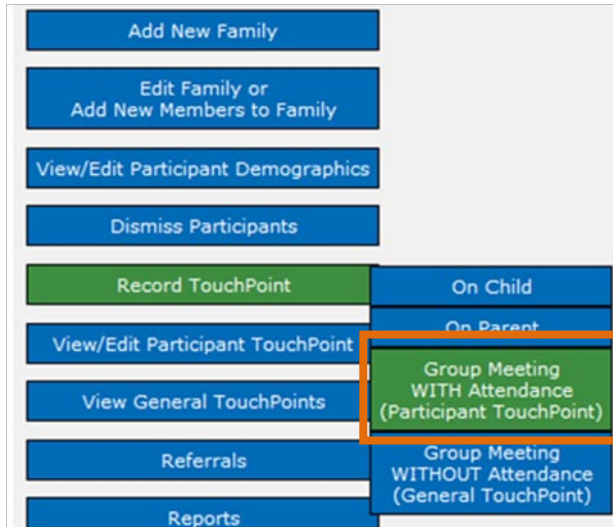
[Return to Dashboard](#) [Save](#)

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)

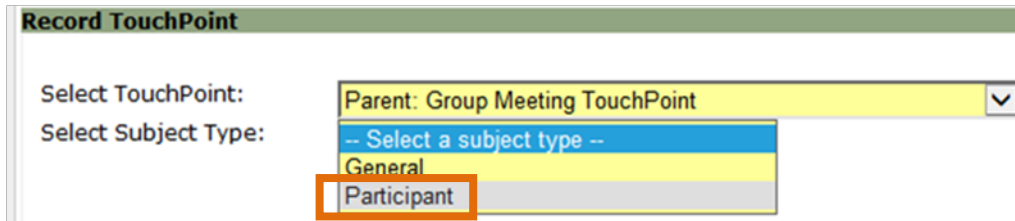
RECORD NEW GROUP MEETING TOUCHPOINT WITH ATTENDANCE (PARTICIPANT TOUCHPOINT)

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)



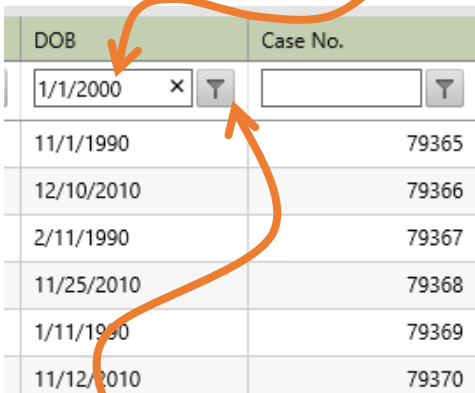
The screenshot shows a vertical menu with the following options: Add New Family, Edit Family or Add New Members to Family, View/Edit Participant Demographics, Dismiss Participants, Record TouchPoint, View/Edit Participant TouchPoint, View General TouchPoints, Referrals, and Reports. The 'Record TouchPoint' option is highlighted in green. A sub-menu is open next to it, showing 'On Child', 'On Parent', 'Group Meeting WITH Attendance (Participant TouchPoint)' (highlighted in green and outlined in orange), and 'Group Meeting WITHOUT Attendance (General TouchPoint)'.

3. In the Select Subject Type dropdown click on Participant



The screenshot shows the 'Record TouchPoint' form. The 'Select TouchPoint:' dropdown is set to 'Parent: Group Meeting TouchPoint'. The 'Select Subject Type:' dropdown is open, showing options: '-- Select a subject type --', 'General', and 'Participant' (highlighted in orange).

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

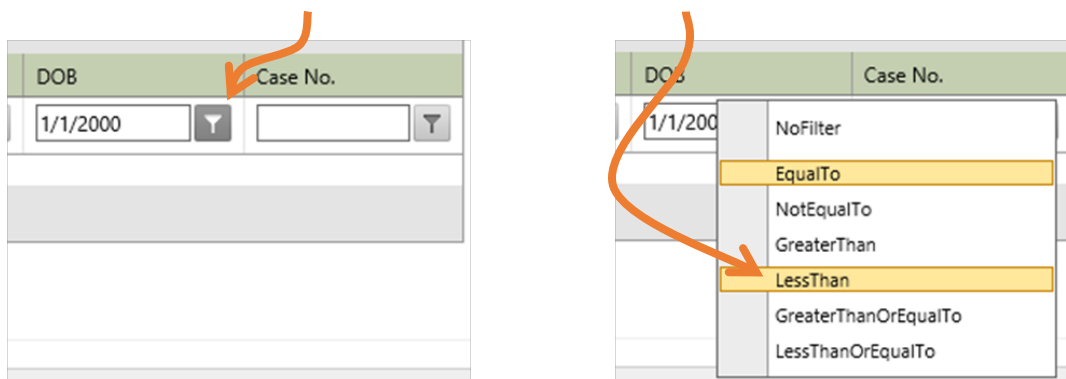


The screenshot shows a table with two columns: 'DOB' and 'Case No.'. The 'DOB' column has a filter box containing '1/1/2000' and a filter icon. The table lists several participants with their DOBs and Case Numbers.

DOB	Case No.
1/1/2000	
11/1/1990	79365
12/10/2010	79366
2/11/1990	79367
11/25/2010	79368
1/11/1990	79369
11/12/2010	79370

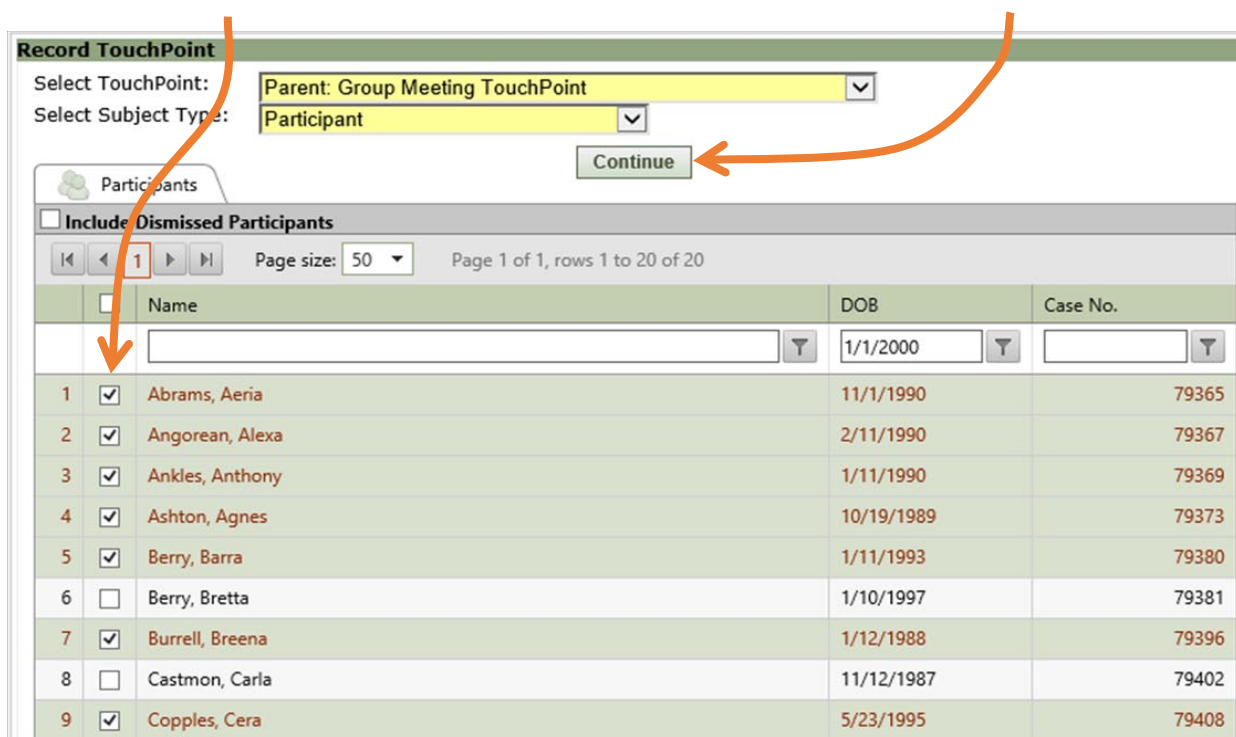
5. Click the filter next to the text field

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



The first screenshot shows a form with a 'DOB' field containing '1/1/2000' and a 'Case No.' field. A filter icon is visible next to the 'Case No.' field. The second screenshot shows the filter dropdown menu with options: NoFilter, EqualTo, NotEqualTo, GreaterThan, LessThan (highlighted), GreaterThanOrEqualTo, and LessThanOrEqualTo.

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



The screenshot shows the 'Record TouchPoint' form. The 'Select TouchPoint' dropdown is set to 'Parent: Group Meeting TouchPoint' and the 'Select Subject Type' dropdown is set to 'Participant'. The 'Continue' button is highlighted. Below, the 'Include Dismissed Participants' checkbox is checked. A table lists participants with checkboxes in the first column. The first row is highlighted.

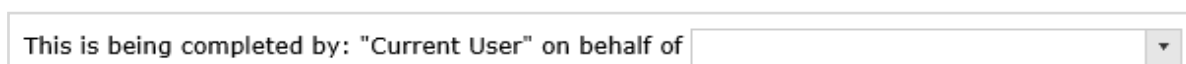
	<input type="checkbox"/>	Name	DOB	Case No.
1	<input checked="" type="checkbox"/>	Abrams, Aeria	11/1/1990	79365
2	<input checked="" type="checkbox"/>	Angorean, Alexa	2/11/1990	79367
3	<input checked="" type="checkbox"/>	Ankles, Anthony	1/11/1990	79369
4	<input checked="" type="checkbox"/>	Ashton, Agnes	10/19/1989	79373
5	<input checked="" type="checkbox"/>	Berry, Barra	1/11/1993	79380
6	<input type="checkbox"/>	Berry, Bretta	1/10/1997	79381
7	<input checked="" type="checkbox"/>	Burrell, Breena	1/12/1988	79396
8	<input type="checkbox"/>	Castmon, Carla	11/12/1987	79402
9	<input checked="" type="checkbox"/>	Copples, Cera	5/23/1995	79408

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



The screenshot shows a green box with the text 'Parent: Group Meeting TouchPoint on' followed by a date input field.

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

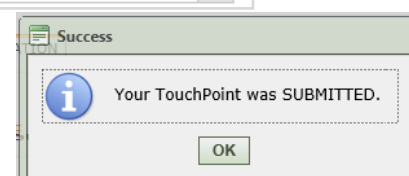


The screenshot shows a dropdown menu with the text 'This is being completed by: "Current User" on behalf of' and a dropdown arrow.

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

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

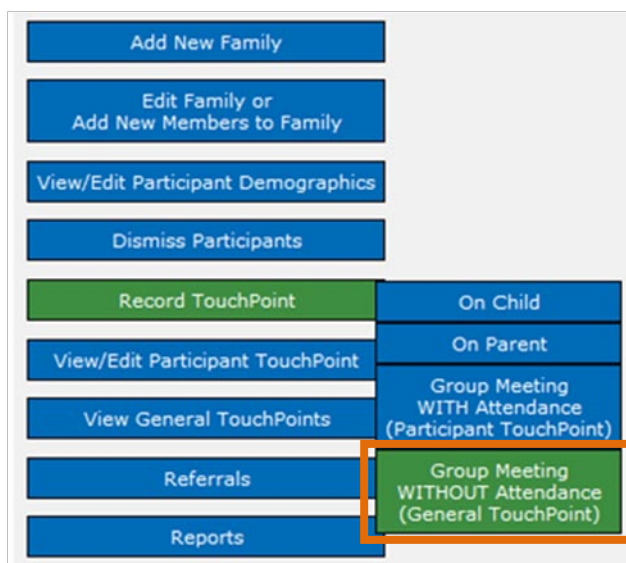
11. Click the Save button at bottom of page and OK in the submittal confirmation box




The screenshot shows a success message box with the text 'Success Your TouchPoint was SUBMITTED.' and an 'OK' button.

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 date of group meeting, (not entered into the system)

Parent: Group Meeting TouchPoint on 

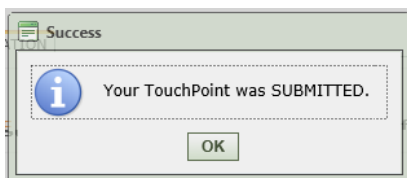
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data

This is being completed by: "Current User" on behalf of ▼

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

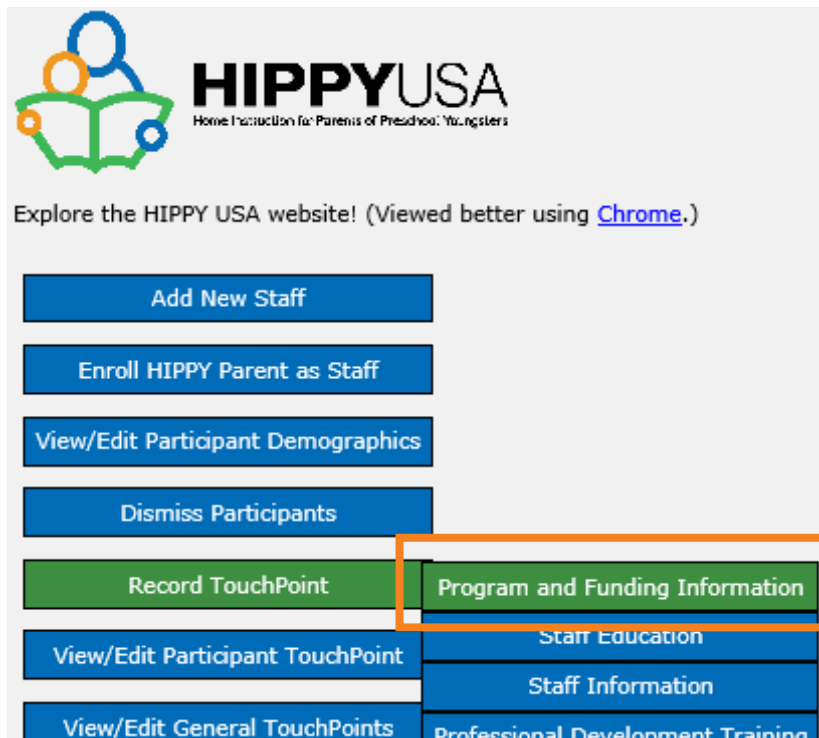
NOTE: Remember any items marked with an asterisk are required fields

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)

Program and Funding Information TouchPoint for Staff on 

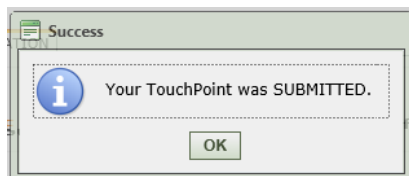
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data

This is being completed by: "Current User" on behalf of ▼

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

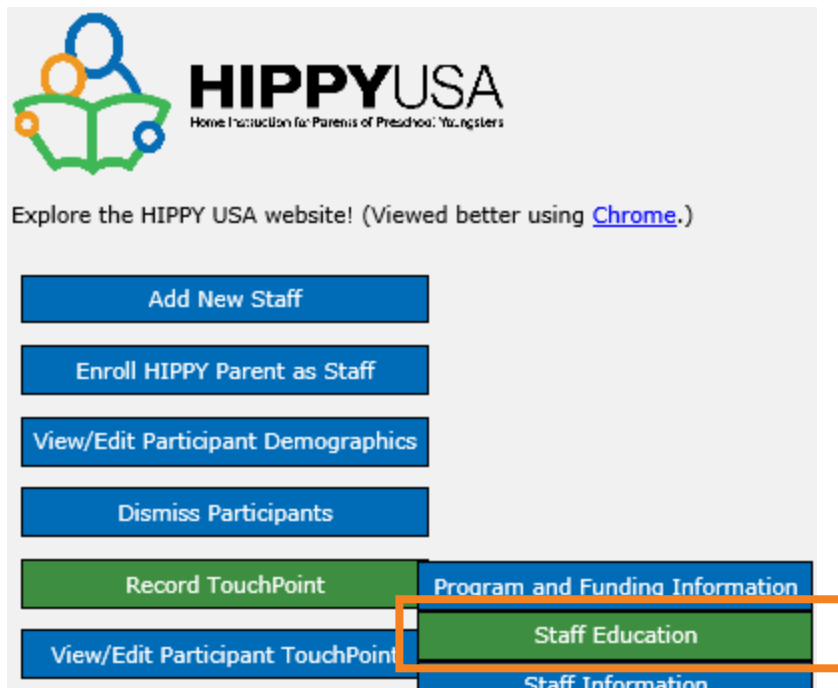
NOTE: Remember any items marked with an asterisk are required fields

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)

Parent: Adult Education TouchPoint (also for Staff) for Susie Queue on

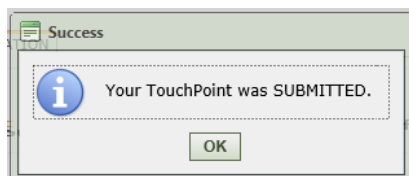
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data

This is being completed by: "Current User" on behalf of

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)

Staff Information TouchPoint for Susie Queue on 

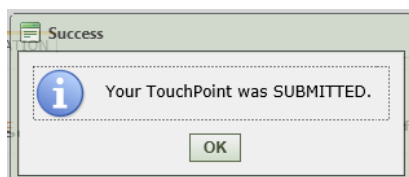
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data

This is being completed by: "Current User" on behalf of

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 date of professional development training, (not entered into the system)

Professional Development TouchPoint for Susie Queue on 

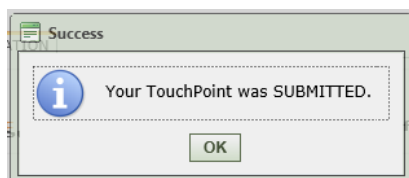
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data

This is being completed by: "Current User" on behalf of

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

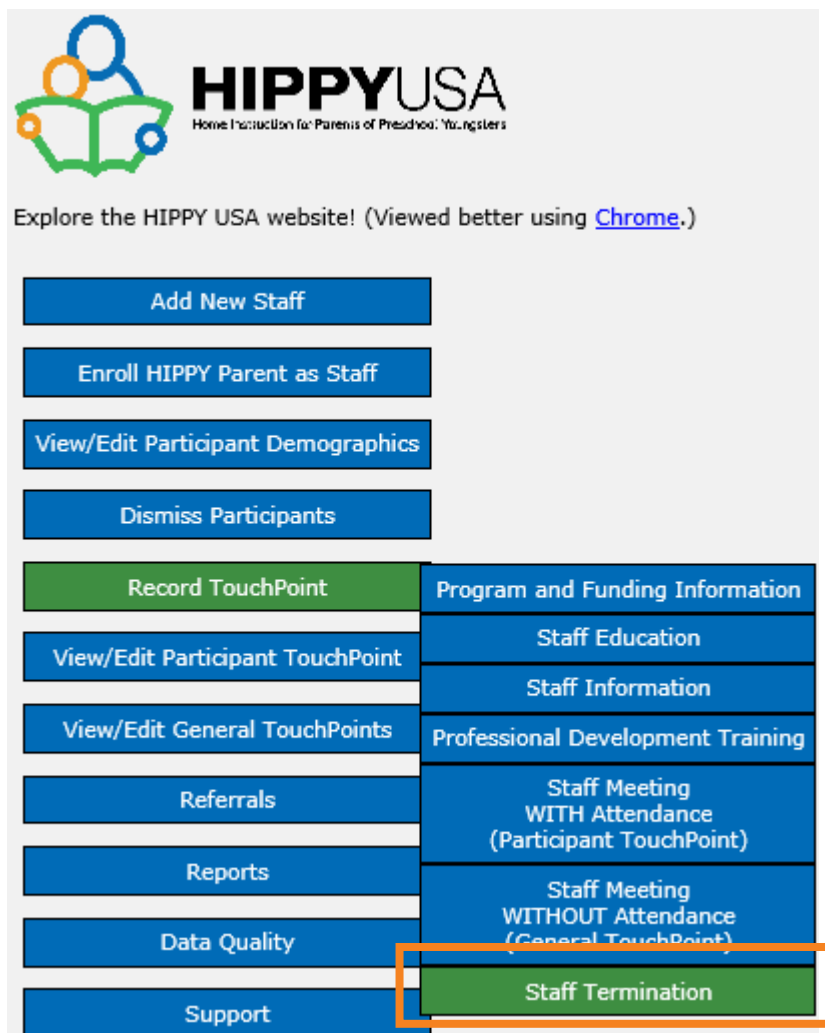
NOTE: Remember any items marked with an asterisk are required fields

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 date the staff member left HIPPY employment, (not entered into the system)

Staff Termination TouchPoint for Susie Queue on

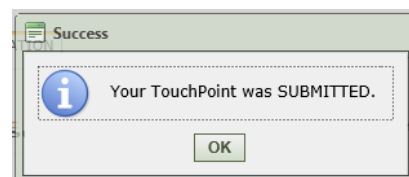
4. Use the on behalf of dropdown ONLY when someone other than the coordinator is entering the data

This is being completed by: "Current User" on behalf of

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

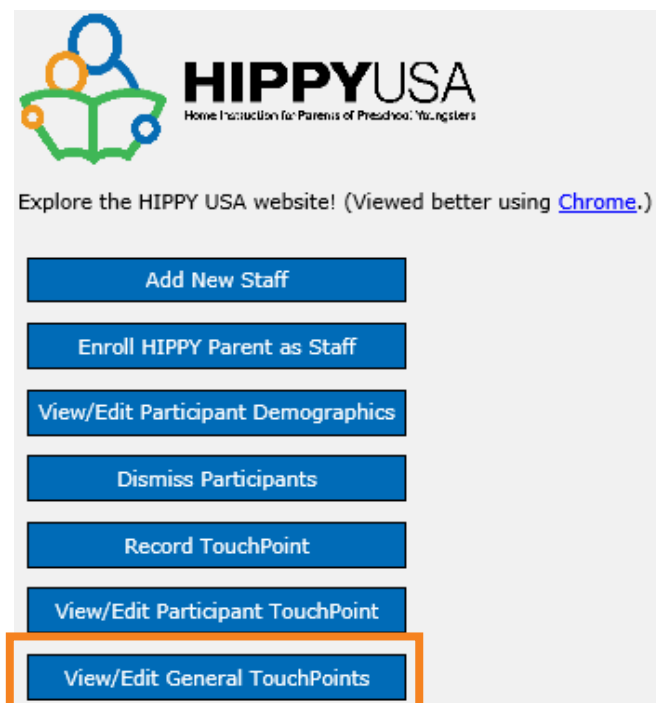
NOTE: Remember any items marked with an asterisk are required fields


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









VIEW/EDIT GENERAL TOUCHPOINT

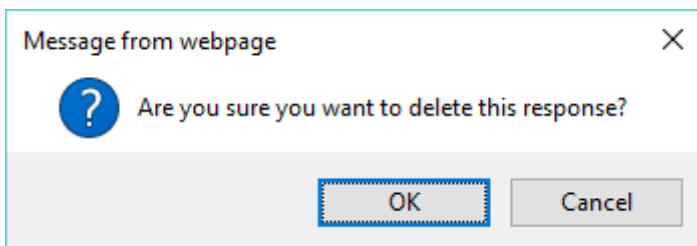
1. Click on View/Edit General TouchPoint under My Dashboard



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

Program and Funding Information TouchPoint Take New					
Date Completed	Last Updated	Identifier	Staff	Status	Take Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	No Filter	<input type="text"/>	
7/1/2016	8/26/2016	253096-3	Natha Jolly		  

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



DISMISS PARTICIPANTS

DISMISSING A SINGLE PARTICIPANT

1. Click on Dismiss Participants under My Dashboard



2. Search for the participant by last name

Dismiss Participants from Families

Search for Participants in *~"Training Arena" by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

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

<input type="checkbox"/>	Participant	Age	Case Number	DOB	SSN
<input checked="" type="checkbox"/>	Grandmamma Fake	68	80489	10/8/1947	

4. Enter the date and reason for dismissal

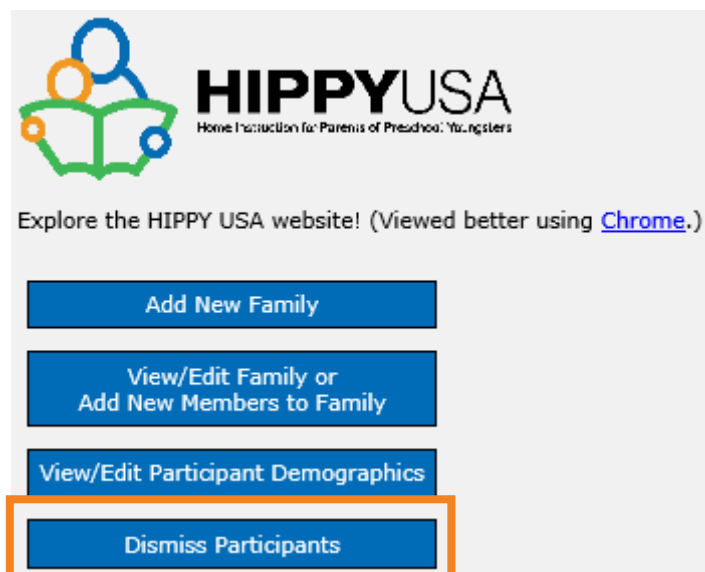
* **Program End Date:**


* **Dismissal Reason:**

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						
<input checked="" type="checkbox"/>	Adult Fake Family					
<input checked="" type="checkbox"/>	Family Members	DOB	Age	Case Number	Relationship	SSN
<input checked="" type="checkbox"/>	Adult Fake	8/19/1985	31	80484	Adult	
<input checked="" type="checkbox"/>	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:** 

* **Dismissal Reason:** 

Name
Adult Fake
Child Fake

Dismiss Participants

6. Click the Dismiss Participants button