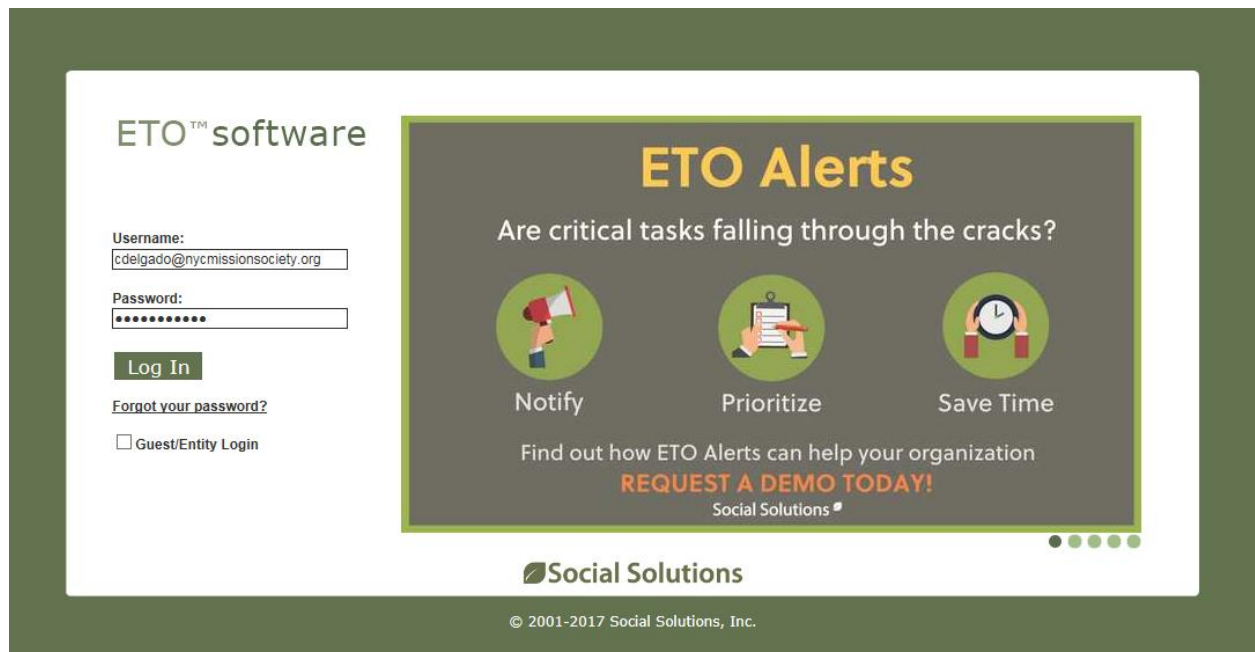




## ***Tracking Outcomes in ETO Software for Children's Programs***



**Department of Contracts and Outcomes (DCO)**

**ETO Training Manual**

**Rev. 9/2017**



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# Log In

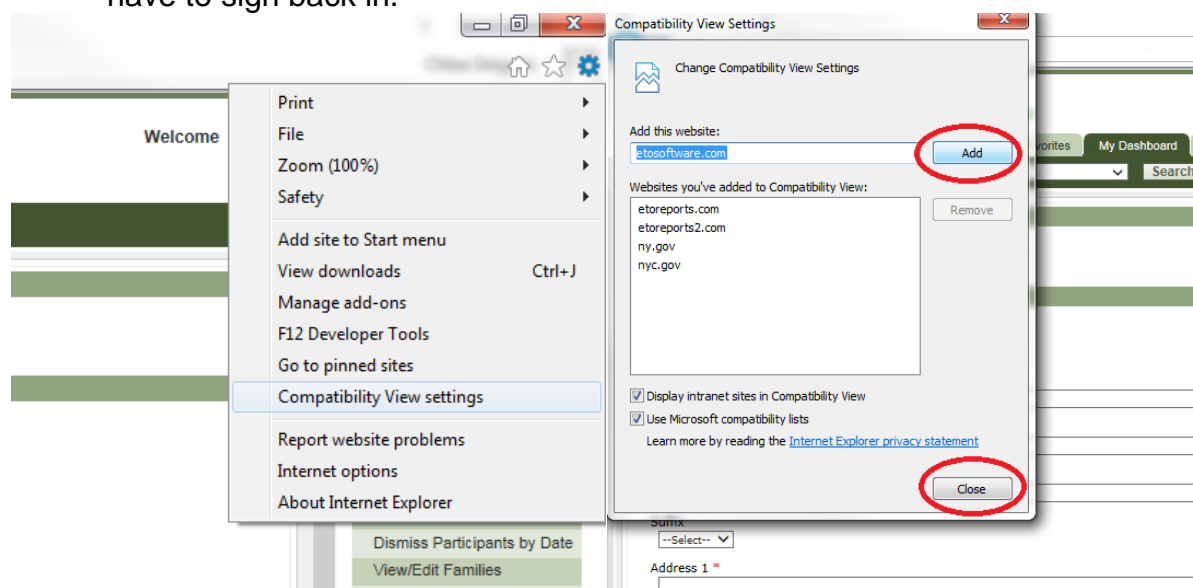
## Login Instructions:

Go to ETO Website – Address is [www.secure.etosoftware.org](http://www.secure.etosoftware.org). **Always use Internet Explorer.**

- 1.) Username: Your NYCMS e-mail address
- 2.) Initial Password: Mission1
- 3.) Click Login
- 4.) Upon signing in for the **first time**, you will be prompted to reset your password. Please take the opportunity to do so otherwise you run the risk of allowing someone else to use your log in information.

## Tips:

1. If upon signing in, your dashboard seems jumbled or squeezed together, please check your compatibility settings in your Internet Explorer browser. You may need to add the website. Once added, the webpage will refresh and you may have to sign back in.



2. If you forget your password, please click on the “Forgot Your Password?” link on the sign in page and follow the instructions.
3. **If you see anything unusual in your program portal, please contact DCO immediately!**

# Adding Participants

**\*\*\*BEFORE adding each participant, please ensure that each participant is not already in the ETO database. If they are, please reference Page 6 on how to enroll a participant already in the system. \*\*\***

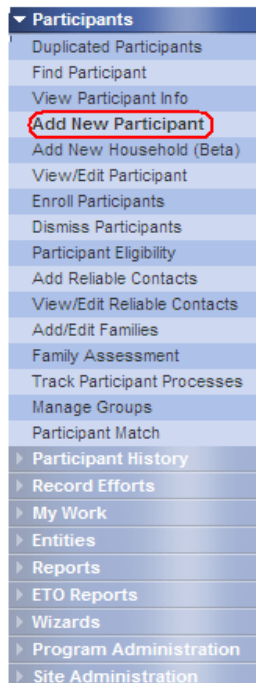
The following are instructions on how to add a new participant to your program. There are two ways to choose from; both work the same.

**Cautionary Note:** When you are entering the information for an individual participant, all the required fields are designated by an asterisk and in the case of the textboxes they are highlighted in yellow.

## First Way

Action	Expected Result
Log In	Welcome Page
Look to the right side of your screen and click on <b>Participants</b> drop down menu	An expanded participants menu appears (Image 1)
Click on <b>Add New Participant</b>	You are directed to Participant Information page where all the required fields are marked with an asterisk (*) (Image 2)
Enter all the required participant information (either by typing in the textboxes or selecting the appropriate option from the drop down menu). <u>Be sure to indicate the correct start date for that particular participant.</u>	All the required information is entered
Click <b>Submit</b>	A pop-up window will appear saying that you have successfully added a participant. You are done adding a new participant. Repeat process with next participant

**Image 1**



**Image 2**

 A screenshot of a web form titled 'Add New Participant'. The form contains several fields for entering participant information. Fields marked with an asterisk (\*) indicate required information. These include: Gender (a dropdown menu), First Name, Middle Name, Last Name, Suffix (a dropdown menu), Address 1, Address 2, Zip Code (with separate boxes for city, state, and zip), Email, DOB (with separate boxes for month, day, and year), Work Phone, Home Phone, and Cell Phone. There is also a 'Race/Ethnicity' dropdown menu. At the bottom, there are checkboxes for 'Public Benefits' with the following options: 'Public assistance (also known as Temporary Assistance for Needy Families, TANF)', 'Food Stamps (also known as SNAP/EBT)', 'Medicaid', 'Free or reduced lunch (at school)', 'Housing (WCHA/Section 8/LINC/CITYFAPS/SEPS, etc.)', and 'I don't receive any of the public benefits listed above.'

## Second Way

Action	Expected Result
Log In	Welcome Page
Look to the top left side of your screen and click on tab titled <b>New</b> (right after the Home tab)	You will see a dashboard with several intake options (Image 3)
Click on <b>Add New Participant</b>	You are directed to Participant Information page where all the required fields are marked with an asterisk (*) (Image 2; previous page)
Enter all the required participant information (either by typing in the textboxes or selecting the appropriate option from the drop down menu). <u>Be sure to indicate the correct start date for that particular participant.</u>	All the required information is entered
Click <b>Submit</b>	A pop-up window will appear saying that you have successfully added a participant. You are done adding a new participant. Repeat process with next participant

**Image 3**



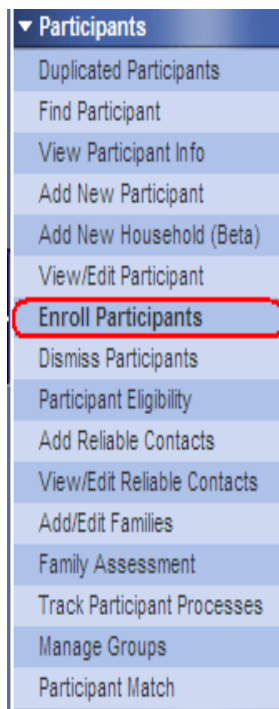
# Searching/Enrolling Participants

The following are instructions on how to enroll a participant who has been previously in database (i.e. participant who has been part of other NYCMS programs). **\*\*Please note that this process does not apply to any students who was enrolled into ETO prior to July 1<sup>st</sup>, 2017. Any returning students who participated prior to July 1<sup>st</sup>, 2017 will need to be added as a new participant. Starting July 1<sup>st</sup> 2018, you will begin this process to find participants who have been added in the prior school year (September 2017-June 2018) \*\***

Action	Expected Result
Log In	Welcome Page
Look to the right side of your screen and click on <b>Participants</b> drop down menu	An expanded participants menu appears (Image 4)
Click on <b>Enroll Participant</b>	You are directed to the <b>Search Participant</b> page (Image 5)
Search for previously enrolled participant by entering the participants last name and click <b>Search</b> (Image 6)	One or more search results will appear at the bottom of the page in a section called "Search Results"
Check the participant that you want to enroll	A new section will appear at the bottom of the page and will allow you to enter a start date
Select the correct start date for the participant and click <b>Submit</b>	A pop-up window will appear saying that you have successfully enrolled a participant. You are done enrolling an existing participant. Repeat process with next participant already in the ETO database

**Image 4**

**Image 5**



**Participants**

- Duplicated Participants
- Find Participant
- View Participant Info
- Add New Participant
- Add New Household (Beta)
- View/Edit Participant
- Enroll Participants**
- Dismiss Participants
- Participant Eligibility
- Add Reliable Contacts
- View/Edit Reliable Contacts
- Add/Edit Families
- Family Assessment
- Track Participant Processes
- Manage Groups
- Participant Match

**Search Participant**

Search for Participants in New York City Mission Society by last name (partial), first name, social security number, case number, or family name. To see **all Participants** leave the boxes empty. To search for Participants by (partial) Last Name use the text box to the left. To further define your search use the text boxes below.

Last Name:

First Name:

SSN:

Case Number:

Family Name:

**Image 6**

Below are all Participants who are not currently enrolled in **Fake Test Program 4** with last name like 'fake'.

<input type="checkbox"/> Participant	Age	Case Number
<input type="checkbox"/> Ron Fake	7	10272
<input type="checkbox"/> Ron Fake	0	10273
<input checked="" type="checkbox"/> Bertha Fakee	0	10274

\* Program Start Date:

# Viewing All Participants in your Program

Clicking on the search button underneath the navigation tabs will display all participants currently enrolled in your program.



The screenshot shows the ETO Software interface. At the top, there is a header with the ETO Software logo and the New York City Mission Society logo. Below the header, a welcome message reads: "Welcome Amanda Perez - New York City Mission Society: Fake Program For Testing II (Change Program)". A navigation bar contains several tabs: "New", "Quick Search", "To Do List", "Messages", "My Favorites", "My Dashboard", and "Marketplace (NEW)". Below the navigation bar, there is a search bar with the text "Enter Search Term(s)" and a dropdown menu set to "Participant". To the right of the search bar is a "Search" button, which is highlighted with a red circle. Below the search bar, the "Quick Search Results" section is displayed. It shows a table with three rows of results, each preceded by a green arrow icon. The results are: "1. Fake Junior Fake Junior", "2. Fake Senior Fake Senior", and "3. Fakey Faker".

Quick Search Results	
Name	
Matches for: <b>Show All Participants</b>	
1.	→ Fake Junior Fake Junior
2.	→ Fake Senior Fake Senior
3.	→ Fakey Faker

**IMPORTANT:** If you have added a participant to the program in error (meaning that the participant was never a participant to begin with) do not dismiss! Contact DCO immediately to have this issue resolved!

If you entered a duplicate participant, please be sure to let DCO know so we can merge participant profiles.

Also important to note is that caseload in ETO should ALWAYS match caseload in external database (if applicable).



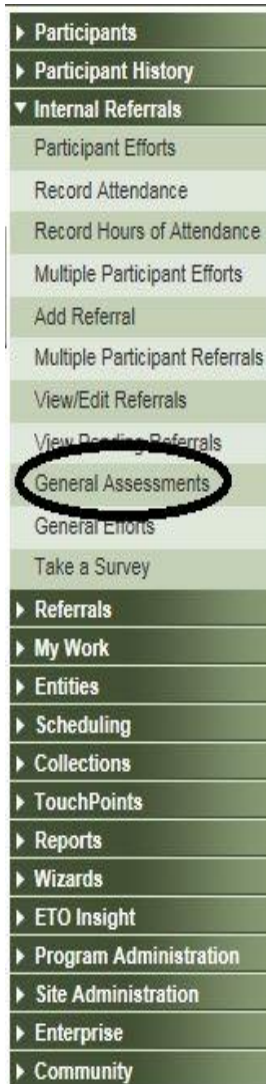
# Quarterly Report

The following are instructions on how to access, complete, review and share your quarterly report in ETO.

Action	Expected Result
Log In	Welcome Page
Look to the right side of your screen and click on <b>Internal Referrals</b>	An expanded internal referrals menu appears (Image 7)
Click on <b>General Assessments</b>	You are directed to the Assessment page (Image 8)
Click on <b>Take New Assessment</b>	You are directed to the current Quarterly Report page (Image 9)
If you are unable to finish or have yet received <u>final approval</u> from your Senior Director, you may click on <b>Save Draft</b> at the bottom	The page will refresh and you will have the option to either <b>Edit</b> or <b>Continue</b> at the top of your assessment
Click on <b>Continue</b>	You will be directed back to the Assessment page. Here you can review your report, edit your draft and export it for review
To review your report, click on the drop down menu below <b>Take Action</b> and select <b>Read Only</b> (Image 10)	This will open your report for review
To edit your report, click on the drop down menu below <b>Take Action</b> and select <b>Update</b> (Image 10)	This will open your saved report for editing
To share your report, click on the drop down menu below <b>Take Action</b> and select <b>Report</b> (Image 10)	This will open a separate window and might take 45-60 seconds to load
To save the report, select the envelope icon. You will then be presented with a pop up box, you will then select Microsoft Word from the drop down, give the file a name and click on <b>OK</b> (Image 11-13)	Your exported report will be saved on your desktop. This will be the best way to send your Quarterly Report to your Senior Director for review before final submission and report deadline
Once reviewed by your Senior Director, complete the assessment process by opening your saved draft and clicking on <b>Submit</b> at the bottom of the assessment. This will finalize your report (Image 14)	A pop-up window will appear saying that you have successfully submitted your Assessment Information. Once you click OK, the page will then refresh and you will have the option to either <b>Edit</b> or <b>Continue</b> at the top of your assessment. Click on <b>Continue</b> (Image 15-16)

## Accessing Quarterly Report

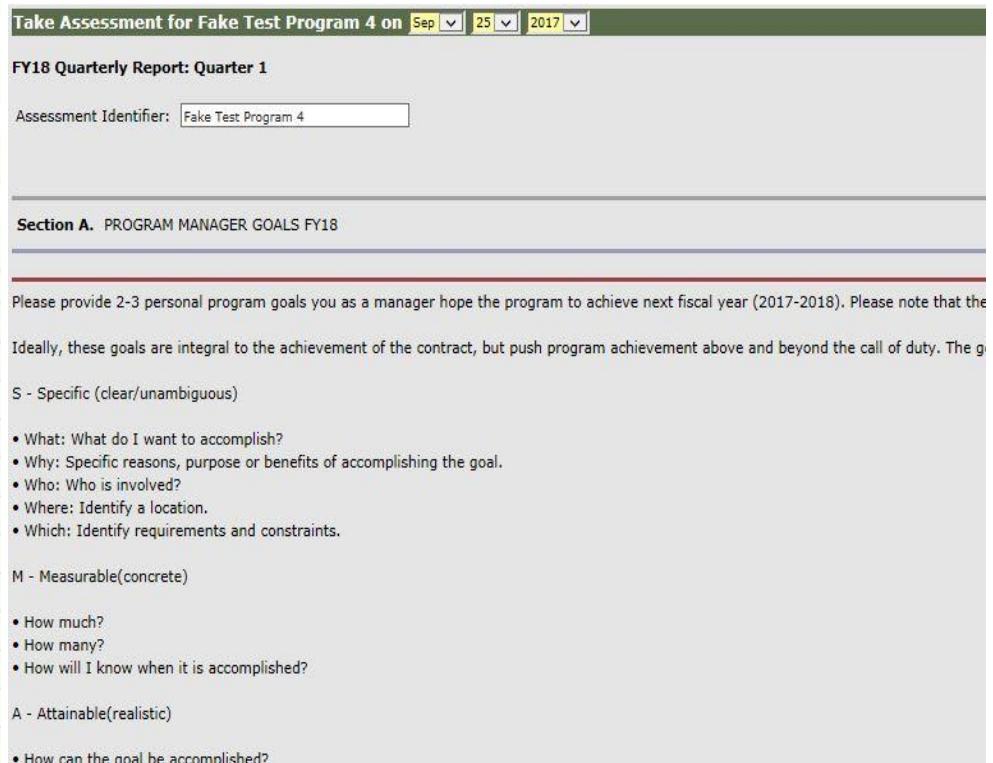
**Image 7**



**Image 8**



**Image 9**



**Image 10**

Assessment Name					
FY18 Quarterly Report: Quarter 1					
Date Completed	Last Updated	Identifier	Staff	Status	Take Action
09/25/2017	09/25/2017	Fake Program 1	Chloe Delgado	DRAFT	<b>-- Please select --</b>
09/14/2017	09/25/2017	Fake Program 1	Chloe Delgado	Enabled	-- Please select --
LTW FY18 Quarterly Report: Q1					
Date Completed	Last Updated	Identifier	Staff	Status	Take Action
09/19/2017	09/19/2017	Fake Program 1	Casey Castro	DRAFT	-- Please select --

## ***Sending Draft to Senior Director for Review***

**Image 11**

ETOSoftware - Internet Explorer  
https://etoreports.com/CrystalFrame.asp?UseClassic=yes&Name=%C5%D9%B7%C2%E9%BB%D3%E4%BE%E7%E8%B4%A4%C6%B8%DC%B6%DF%DC%0%D9%B7%D4%E0%D9%E5%B2%BF%81%DB%B3%E6&prompt0=%88%A1w%A8&...  
powered by crystal

Preview

**FY18 Quarterly Report: Quarter 1**

Fake Program 1

**Section A.** PROGRAM MANAGER GOALS FY18

**A-1. Goal # 1**

Goal 1

**A-2. Goal #2**

Goal 2

**A-3. Goal #3**

Goal 3

**Section B.** STORY

**B-1. Please submit another story about how the program has made a difference in the life of one of your participants or families, including quotes**

**Image 12**

Export Report

File Format:  
Microsoft Word

Page Range

☒ All  
☐ Pages:  
From: 1 To: 1

File name:

OK Cancel Browse...

**Image 13**

Report Viewer Export

? The report has been exported. Would you like to open it?

Yes No

## **Submitting Final Report to DCO for Review**

**Image 14**

To fit in it to be higher  
To the most breezed to aspire.  
  
Its strength with a wind-lot by,

Section D. SUCCESSES, CHALLENGES, HIGHLIGHTS, AND UPDATES

D-1. Please share with us a program success, accomplishment, or highlight from the past quarter. How was this success achieved

Ho! we were strong, we were swift, we were brave.  
Youth was a challenge, and Life was a fight.  
All that was best in us gladly we gave,  
Sprang from the rally, and leapt for the height.  
Smiling is Love in a foam of Spring flowers:  
Harden our hearts to him -- on let us press!

D-2. Please share with us at least one item that absolutely did not work last quarter – it may have been an event, an attempt to

Confidence is Beauty  
Beauty is Art  
Art is Performance  
Performance is Excellence  
Excellence is Responsibility  
Responsibility is Collectivism

D-3. Why didn't this work? What have you done in response or what will you do differently as a result of this item not working?

Did you see that man riding past,  
With shoulders bowed with care?  
There's failure in his eyes to last,  
And in his heart despair.  
He seldom looks to left or right,  
He nods, but speaks to none,

Section E. CONTRACT DELIVERABLES

E-1. School Year Enrollment Goal

50

E-2. School Enrollment Actual

50

E-3. School Year ROP Goal

80%

E-4. School Year ROP Actual

95%

☐ Schedule Follow-up Alert to show up on your To-Do list

☐ Schedule Follow-up Alert to show up on Other Staff's To-Do list

Submit

Save Draft

## Submitting Final Draft to DCO for Review (continued)

Image 15

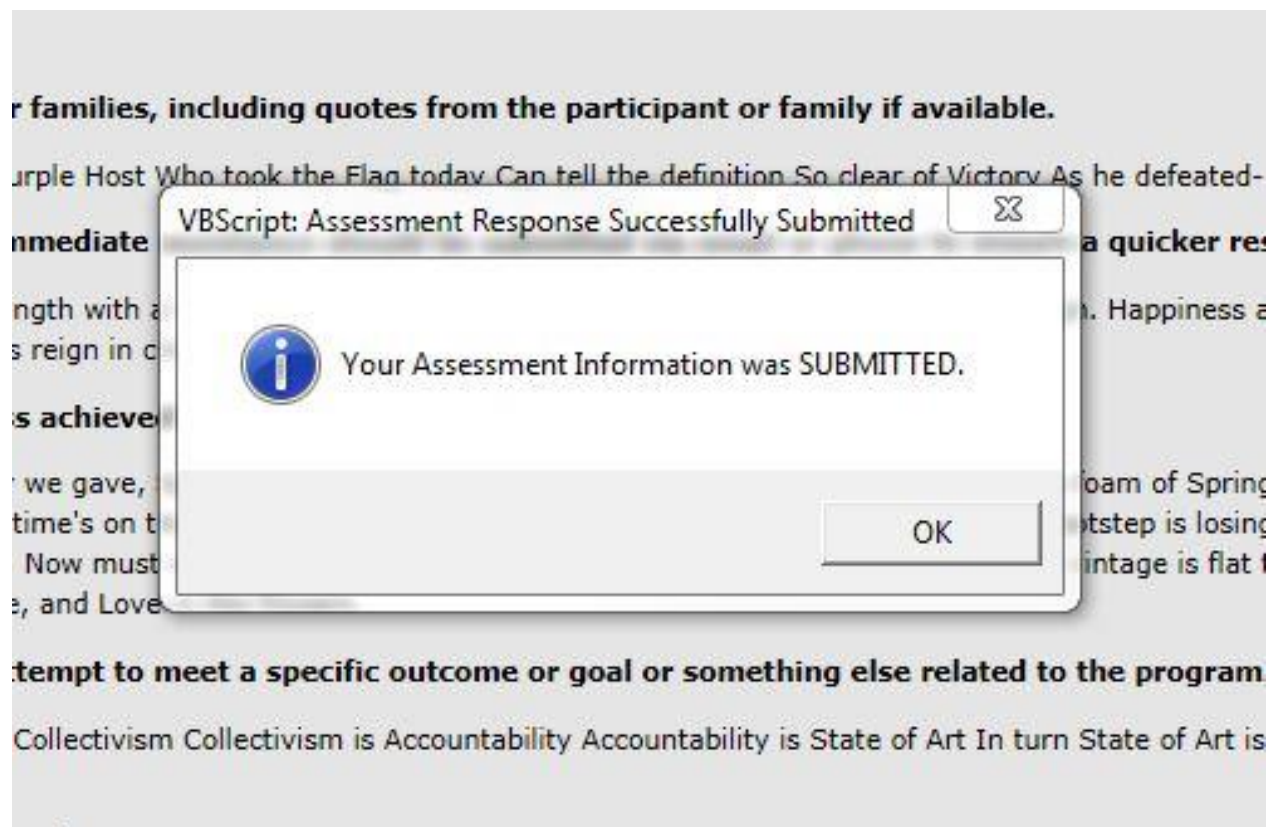


Image 16

**Review Assessment Information for Fake Program 1 on 9/14/2017**

**FY18 Quarterly Report: Quarter 1**

**A-1. Goal # 1**  
Goal 1

**A-2. Goal #2**  
Goal 2

**A-3. Goal #3**  
Goal 3

**B-1. Please submit another story about how the program has made a difference in the life of**  
Success is counted sweetest By those who ne'er succeed. To comprehend a nectar Requires sc

**C-1. Please let us know in what ways Q&E can further assist your program. Though please**  
Essence holds its dream entire, Strengthens hope true into fire To fit in it to be higher To the r  
success glass-bright With glory mounting in sight. Heart content is in sublime, Remains diamo

# Need Further Assistance?

**For ETO Questions and Technical Assistance, contact DCO (Department of Contracts and Outcomes):**

Chloé Delgado, **Coordinator of Program Quality and Evaluation**  
[cdelgado@nycmissionsociety.org](mailto:cdelgado@nycmissionsociety.org)  
(212) 674-3500 x365

Amelia Thompson, **Senior Director of Contracts and Outcomes**  
[athompson@nycmissionsociety.org](mailto:athompson@nycmissionsociety.org)  
(212) 674-3500 x230