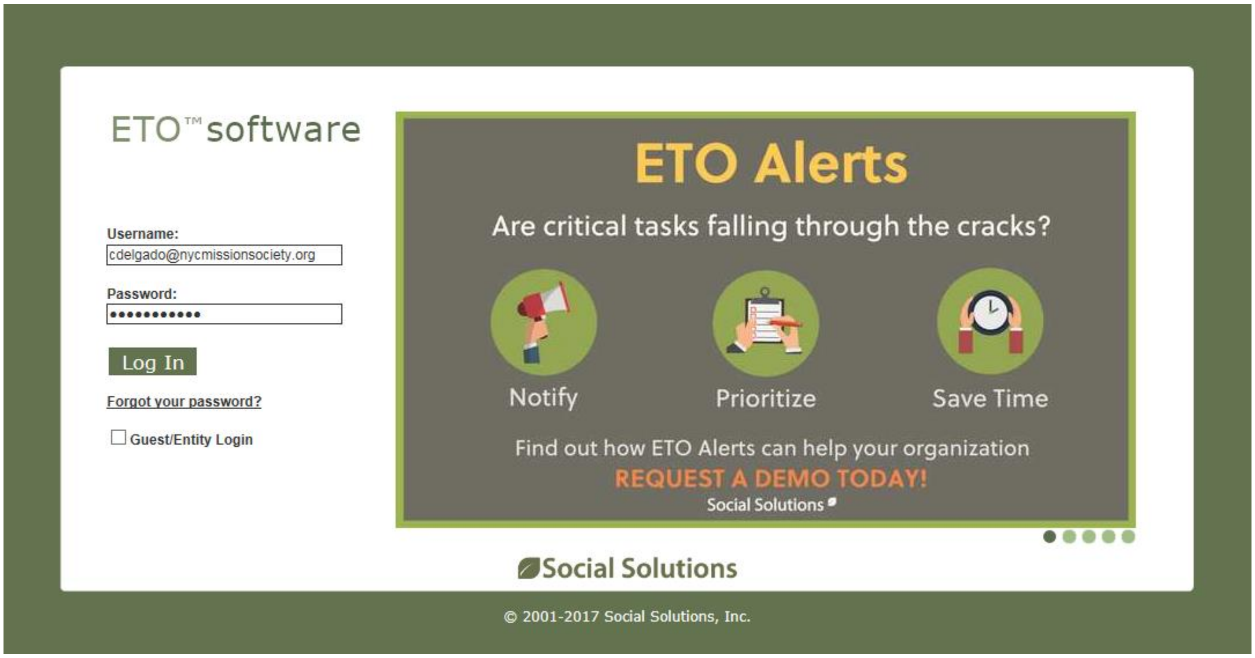
Tracking Outcomes in ETO Software for Learning to Work/ YABC Programs



Department of Contracts and Outcomes (DCO)

ETO Training Manual

Rev. 10/2017

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Log In

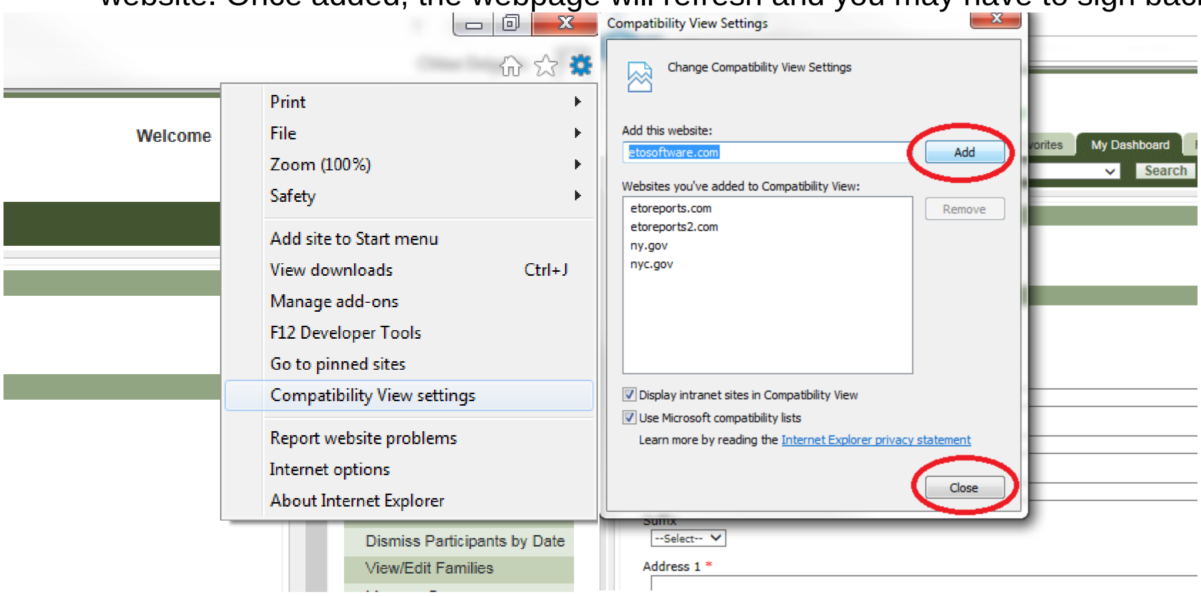
<u>Login Instructions:</u>

Go to ETO Website – Address is 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 **<u>first time</u>**, 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 *<u>immediately</u>*!**

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 **Participants** drop down menu	An expanded participants menu appears (Image 1)
Click on **Add New Participant**	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). *Be sure to indicate the correct start date for that particular participant.*	All the required information is entered
Click **Submit**	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

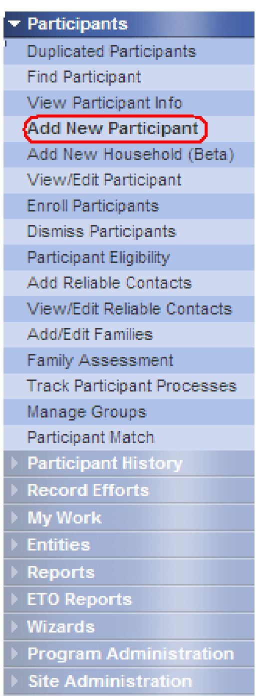
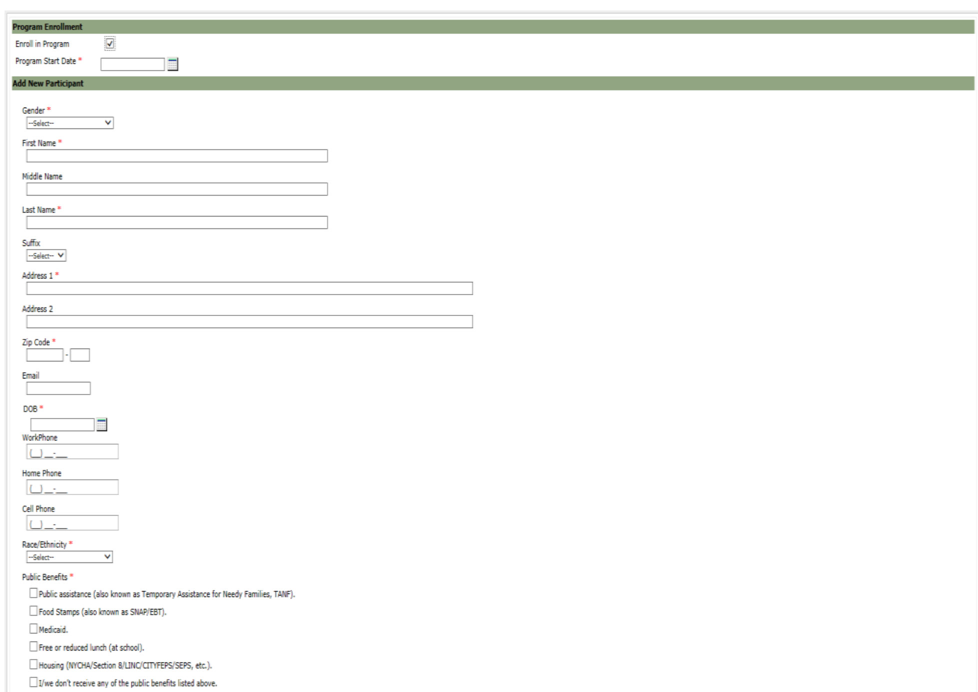


Image 2



<u>Second Way</u>

Action	Expected Result
Log In	Welcome Page
Look to the top left side of your screen and click on tab titled **New** (right after the Home tab)	You will see a dashboard with several intake options (Image 3)
Click on **Add New Participant**	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 **Submit**	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 1st, 2017. Any returning students who participated prior to July 1st, 2017 will need to be added as a *new* participant. Starting July 1st 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 **Participants** drop down menu	An expanded participants menu appears (Image 4)
Click on **Enroll Participant**	You are directed to the **Search Participant** page (Image 5)
Search for previously enrolled participant by entering the participants last name and click **Search** (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 **Submit**	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

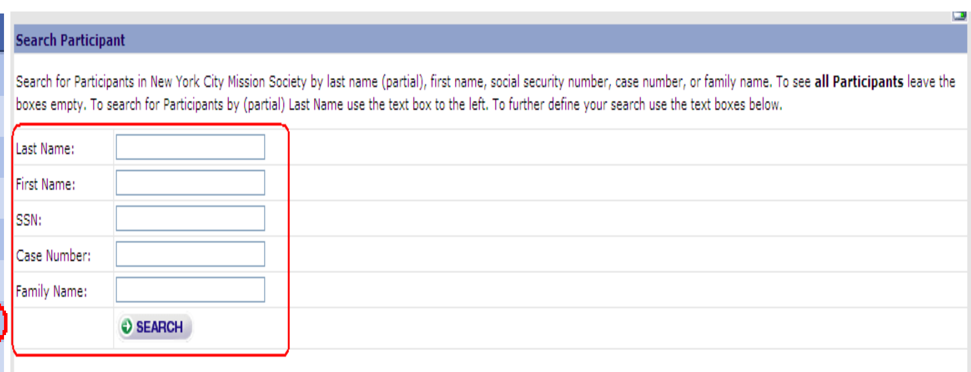
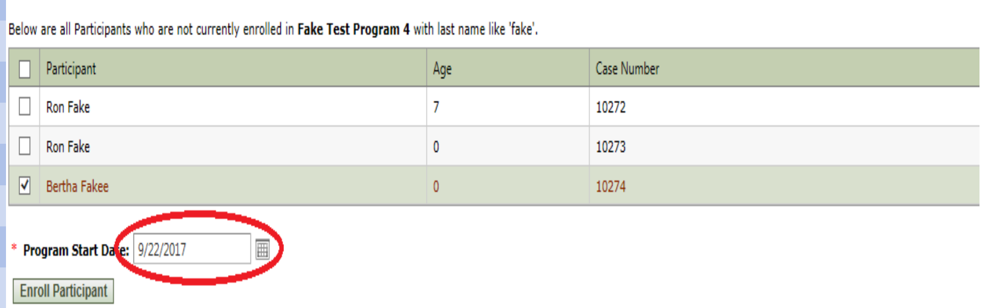


Image 6



Viewing All Participants in your Program

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

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 **Internal Referrals**	An expanded internal referrals menu appears (Image 7)
Click on **General Assessments**	You are directed to the Assessment page (Image 8)
Click on **Take New Assessment**	You are directed to the current Quarterly Report page (Image 9)
If you are unable to finish or have yet received *final approval* from your Senior Director, you may click on **Save Draft** at the bottom	The page will refresh and you will have the option to either **Edit** or **Continue** at the top of your assessment
Click on **Continue**	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 **Take Action** and select **Read Only** (Image 10)	This will open your report for review
To edit your report, click on the drop down menu below **Take Action** and select **Update** (Image 10)	This will open your saved report for editing
To share your report, click on the drop down menu below **Take Action** and select **Report** (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 **OK** (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 **Submit** 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 **Edit** or **Continue** at the top of your assessment. Click on **Continue** (Image 15-16)

Accessing Quarterly Report

Image 7

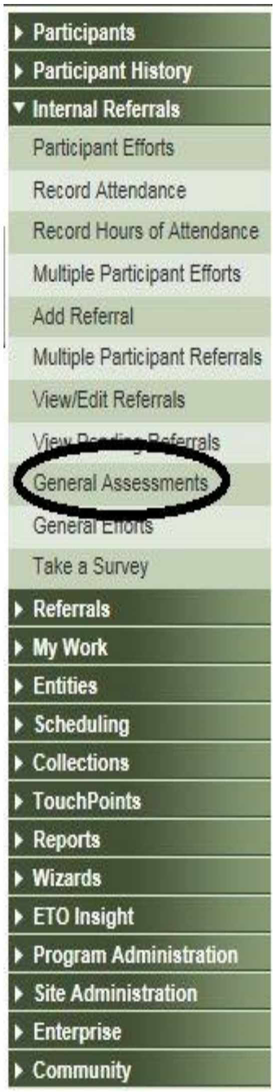


Image 8

Image 9

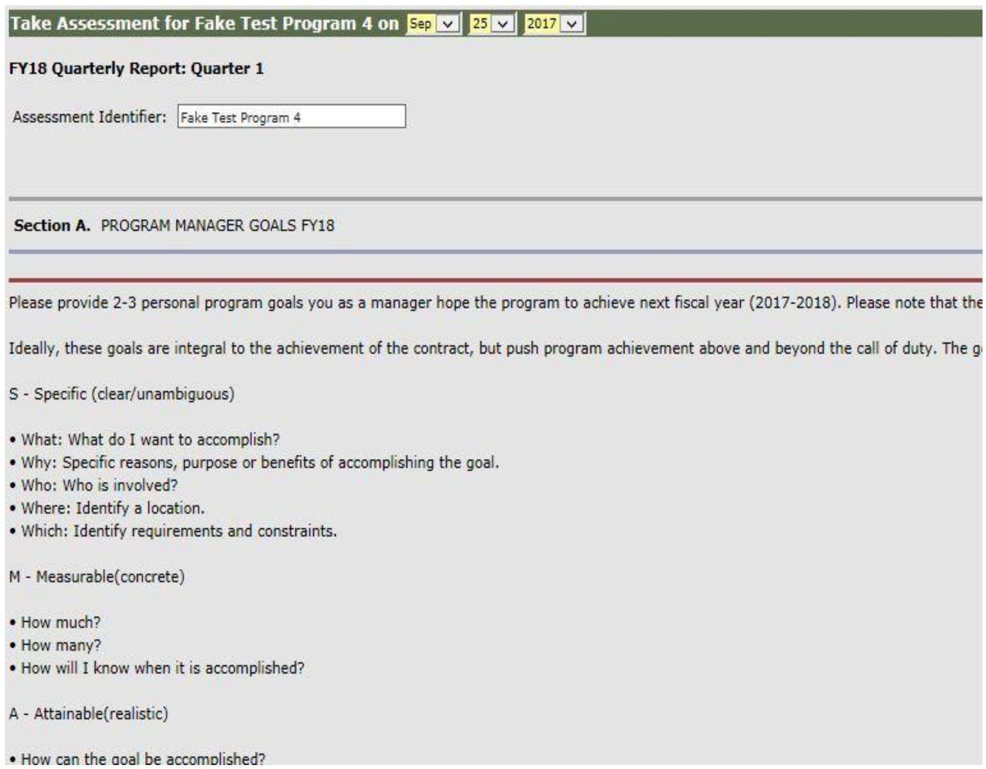


Image 10

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	-- Please select --
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

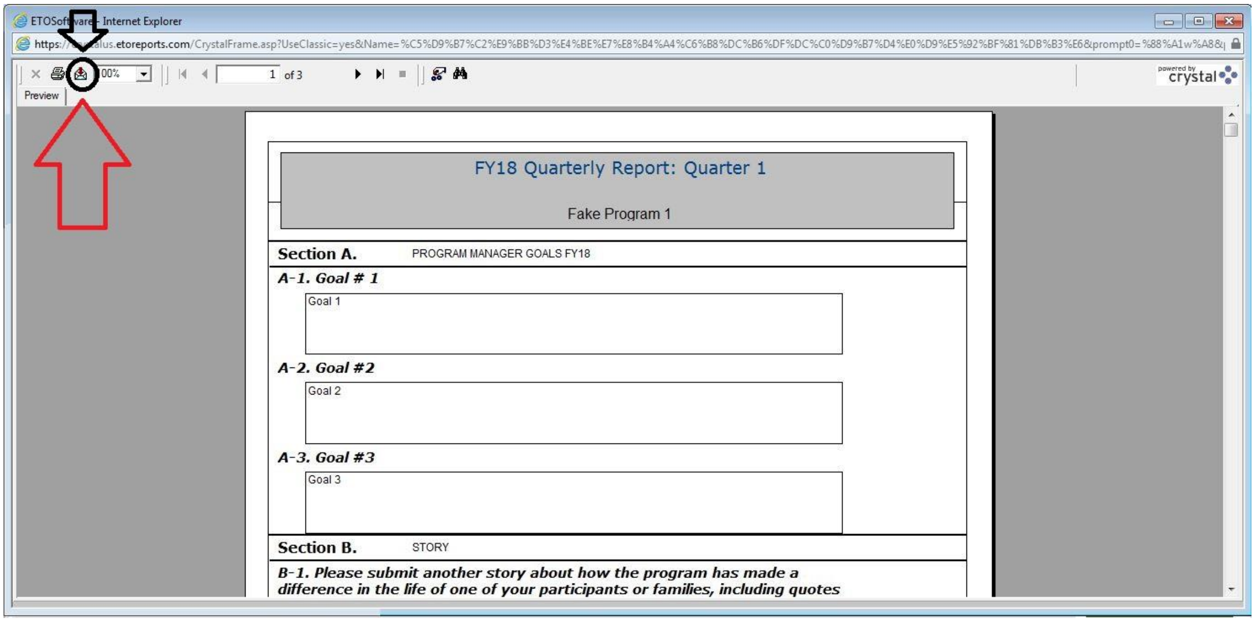


Image 12

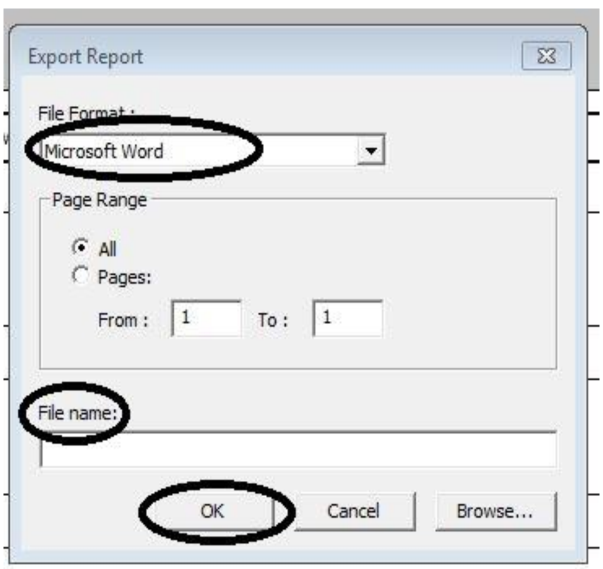
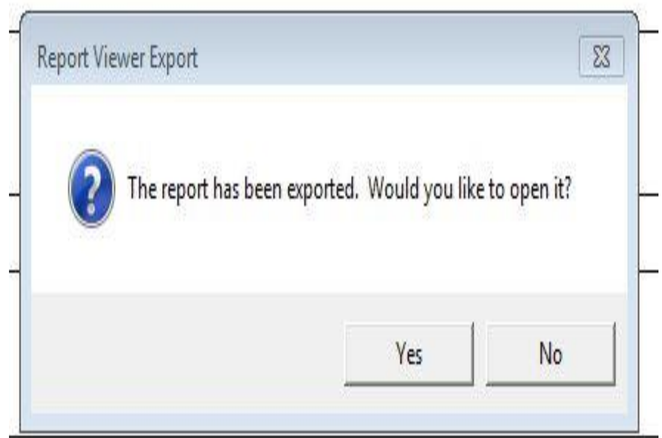
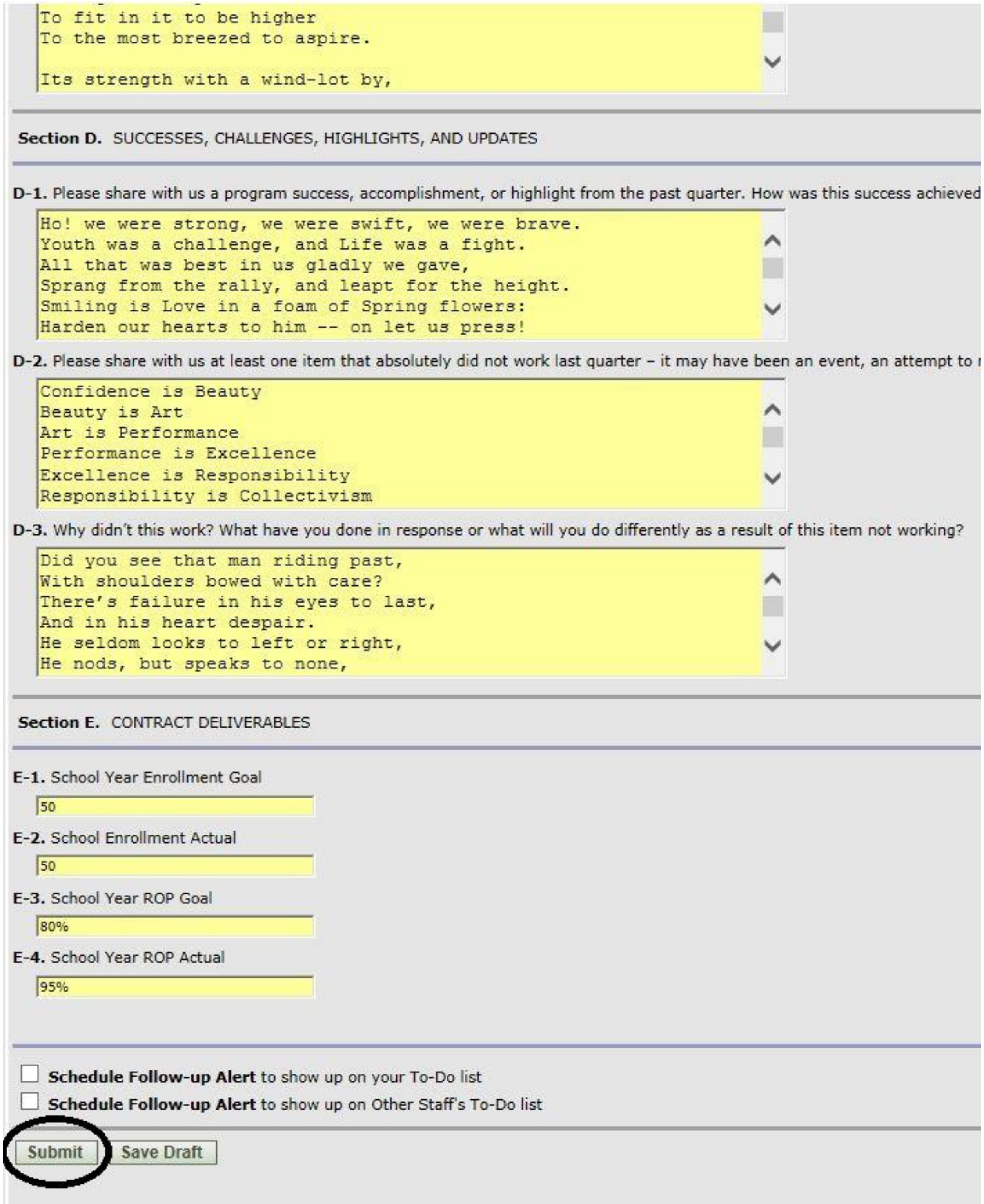


Image 13



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

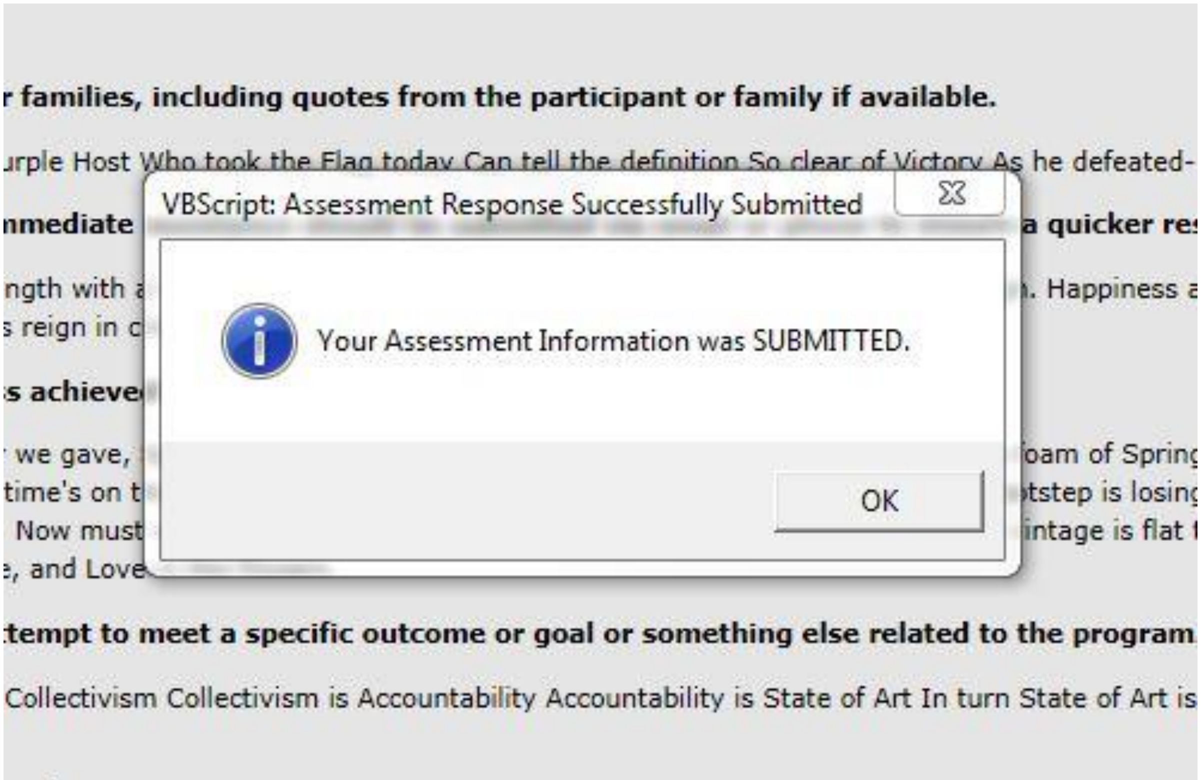
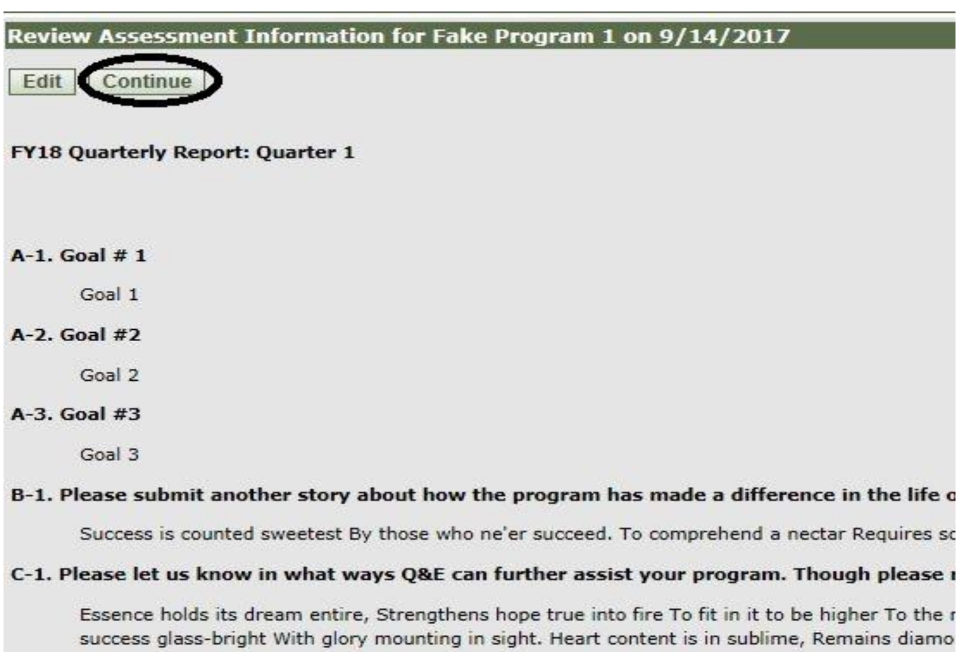


Image 16



Entering Case Notes

Action	Expected Result
Log in	Welcome page
Select **Touchpoints** on the right side of the screen (image 1)	This will expand and provide of list of Touchpoint options
Select record **Touchpoint** (image 2)	This will bring you to the record Touchpoint screen
Select case notes in the drop down (image 3)	This will bring you to the select participant screen
Select participant or participants (image 4)	This will bring you to the case note screen, enter all the required information
Select **Save**	You will receive a message that the Touchpoint was saved.

Important:

You can select one student at a time or multiple for a group session or seminar.

On the top of the page, you will see a statement "This is being completed by: 'your name' on behalf of blank". The blank will have a staff drop down list for you to select the person you are entering this note for. Disregard this section if you are entering your own case note.

You will be able to add up to 3 services at a time.

Image 1

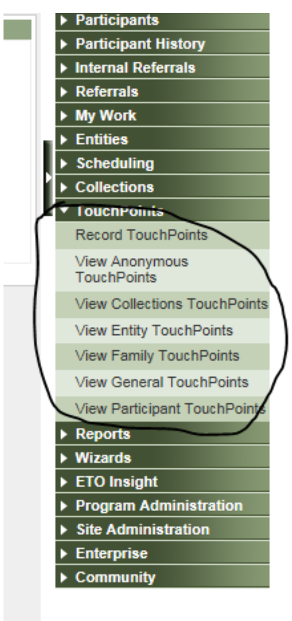


Image 2

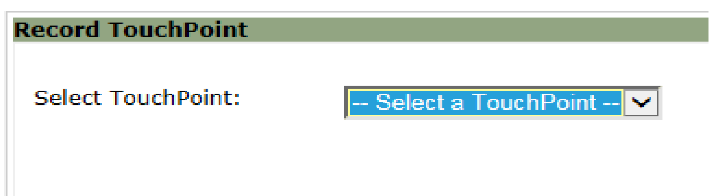


Image 3

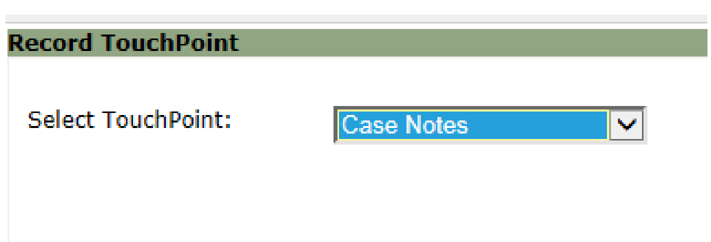


Image 4

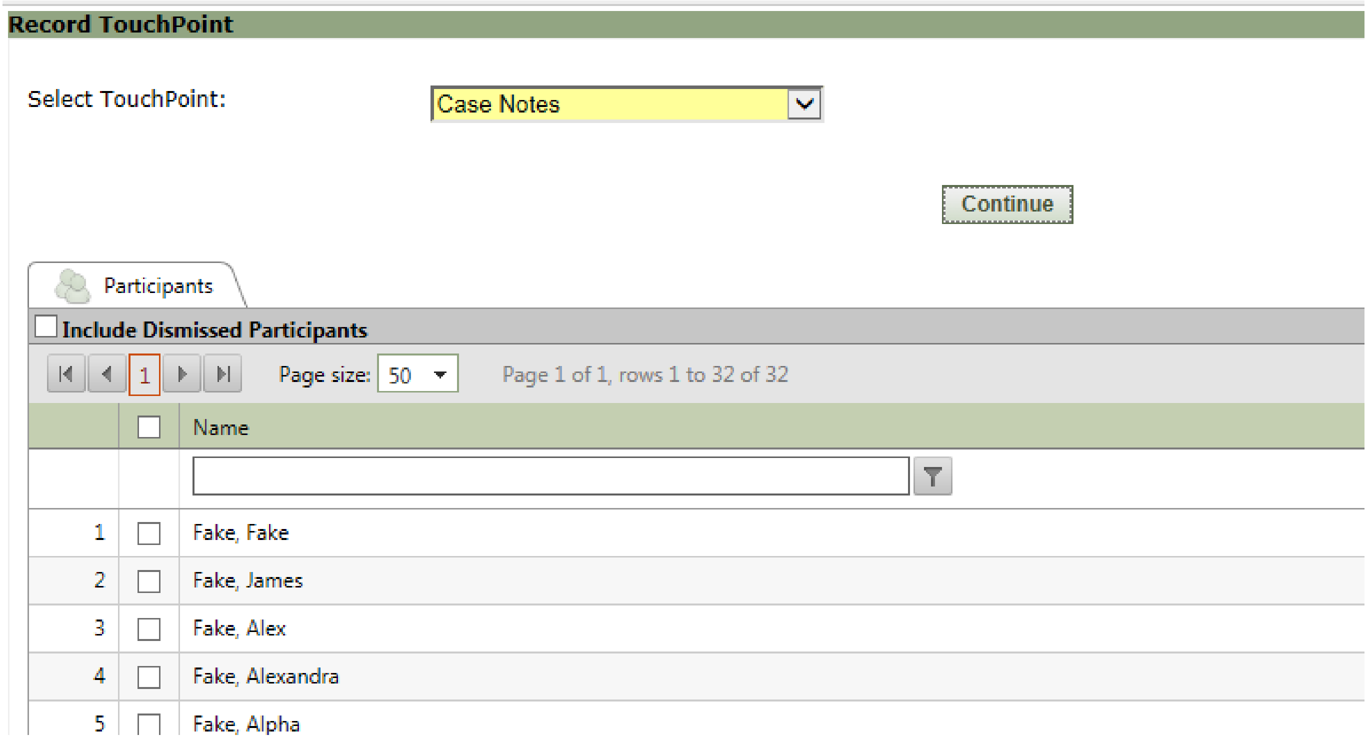
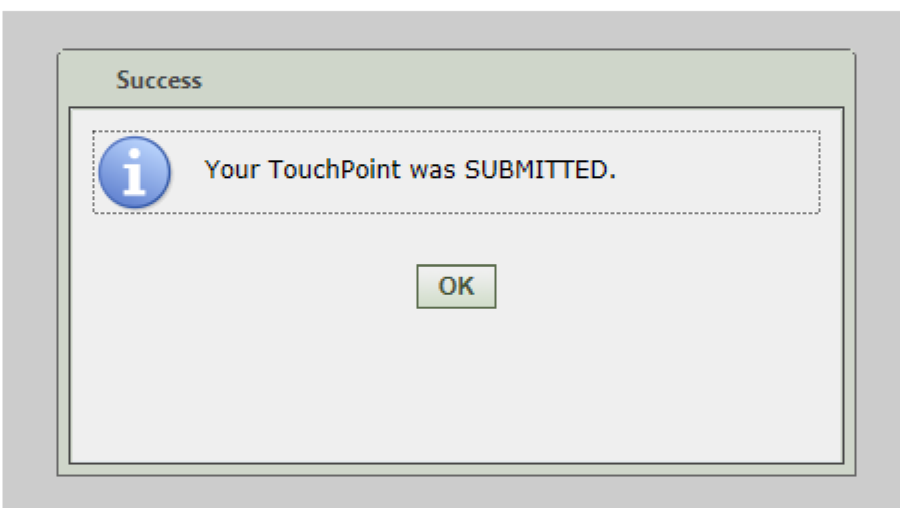


Image 5



Creating a Collection

Action	Expected Result
Log in	Welcome page
Select **Collections** on the right side of the screen	This will expand and provide a Create Collection options
Select **Create Collection** (image 1)	This will bring you to the Select a Collection Type screen
Select **LTW Collection** (image 2)	This will bring you to the add participants screen (image 3)
Enter the name of this Collection (image 4)	Select a unique name for this group of participants
Select **Save**	You will receive a message that the Collection was saved and sent to the collections dashboard
Select **+New** under Collection Touchpoints (image 5)	This will bring you to the select Touchpoint screen
Select **case notes** in the drop down	This will bring you to the case note screen, enter all the required information
Select **Save**	You will receive a message that the Touchpoint was saved.

Image 1

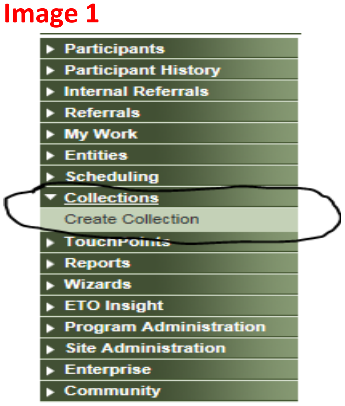


Image 2

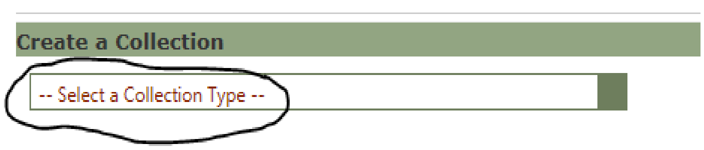


Image 3

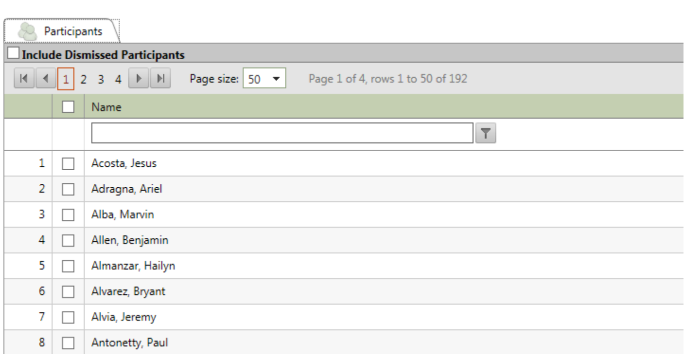


Image 4

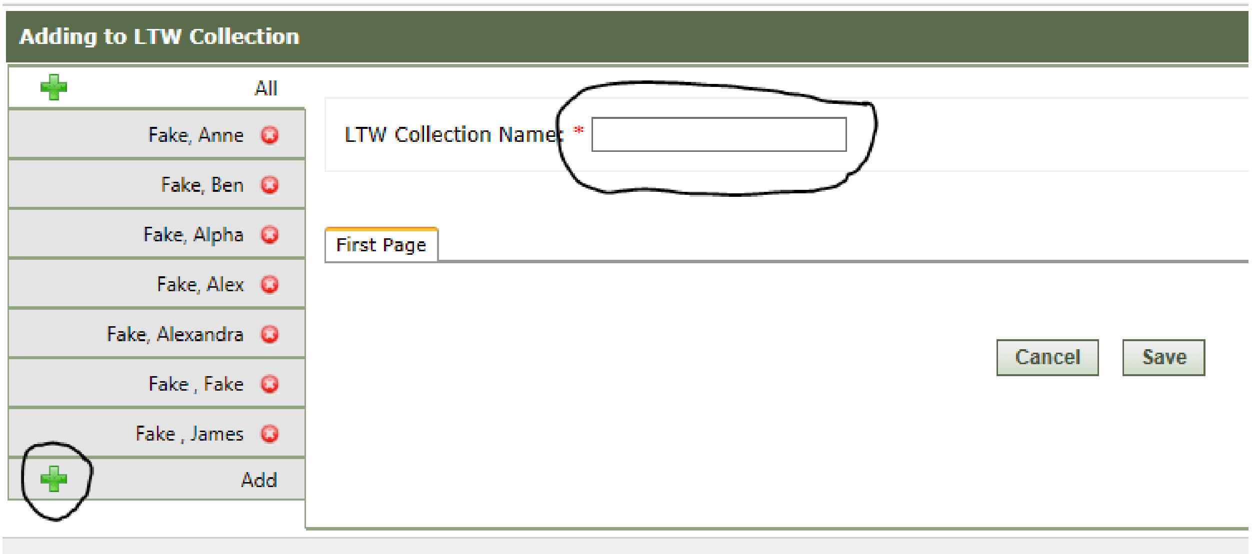
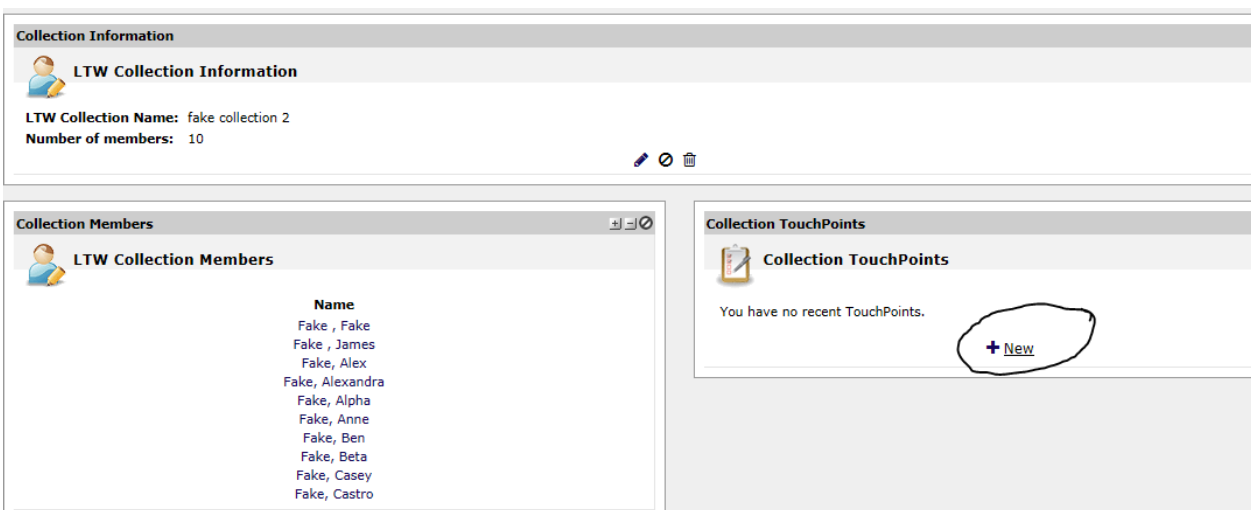


Image 5



Entering a Collections Case Note

Action	Expected Result
Log in	Welcome page
Select **Touchpoints** on the right side of the screen	This will expand and provide of list of Touchpoint options
Select **View Collections Touchpoints** (image 1)	This will bring you to the View Collection Touchpoints screen. (image 2)
Select the Collection previously created	This will bring you to the Review Touchpoints screen (image 3)
Select **Take New Touchpoint**	This bring you to the Select Touchpoint screen. Enter a Touchpoint as previously explained on pgs. 13-14.

Image 1

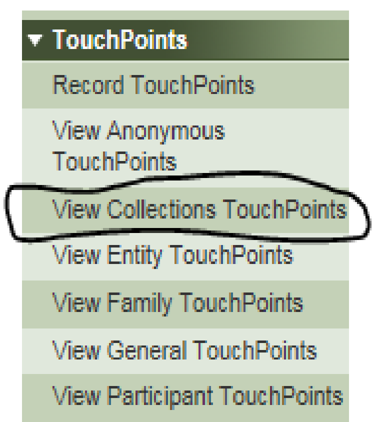


Image 2

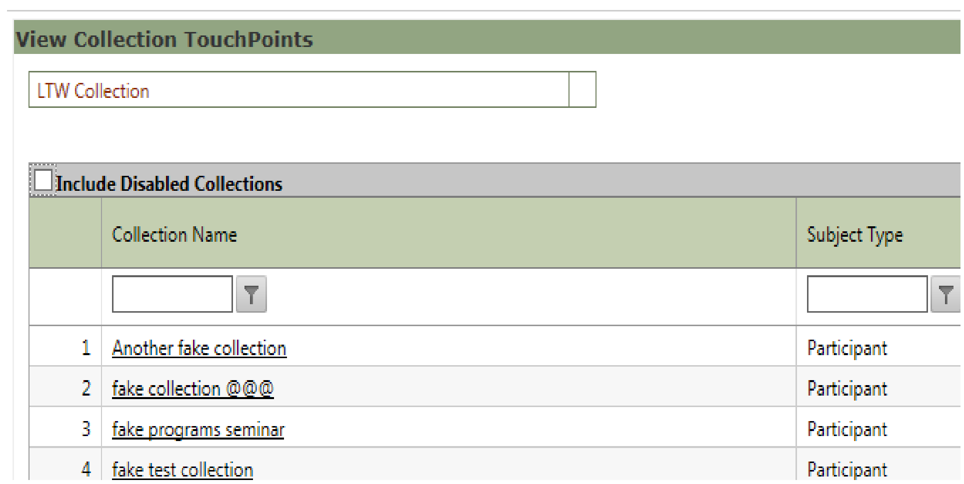
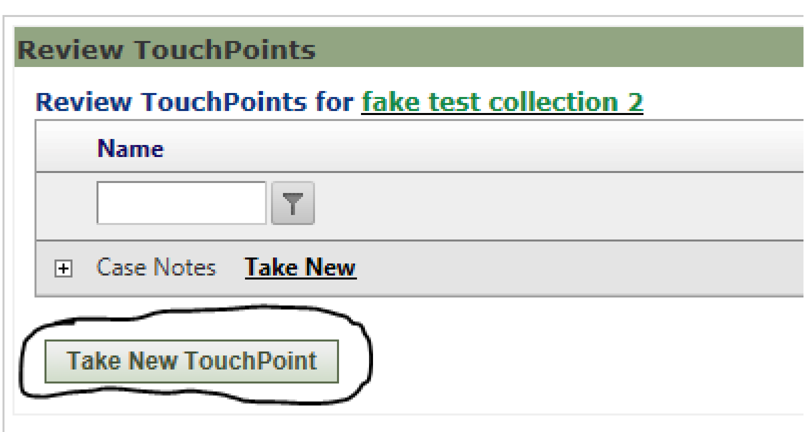


Image 3



Entering Key Student Outcomes

Action	Expected Result
Log in	Welcome page
Select **Touchpoints** on the right side of the screen (image 1)	This will expand and provide of list of Touchpoint options
Select **record Touchpoint** (image 2)	This will bring you to the record Touchpoint screen
Select **Key Student Outcomes** in the drop down (image 3)	This will bring you to the select participant screen
Select participant or participants (image 4)	This will bring you to the Key Student Outcomes screen, enter all the required information (image 5)
Select **Save**	You will receive a message that the Touchpoint was saved.

Important:

Selecting yes to the last 2 questions will open up 2 other follow up questions. Image 6

You have 3 saving options, Save as Draft, Save Progress and Save. Image

Save Draft: Will save your work and close out the screen allowing you to select another participant.

Save Progress: Will save your work but still showing the participant you were working on.

Save: Will submit your Touchpoint.

Image 1

Image 2

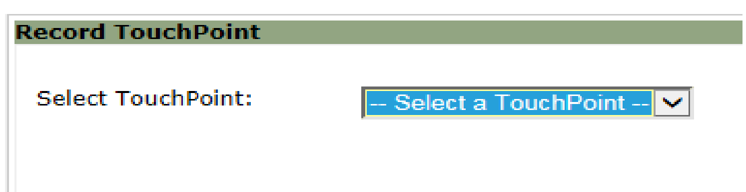


Image 3

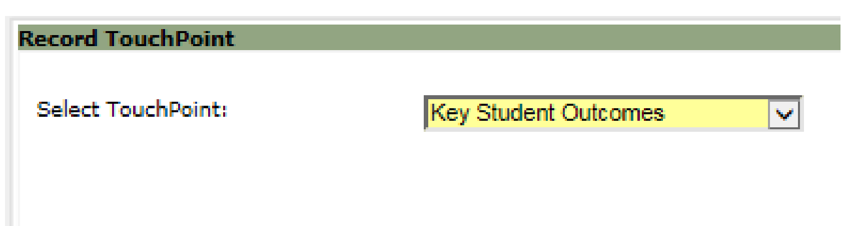
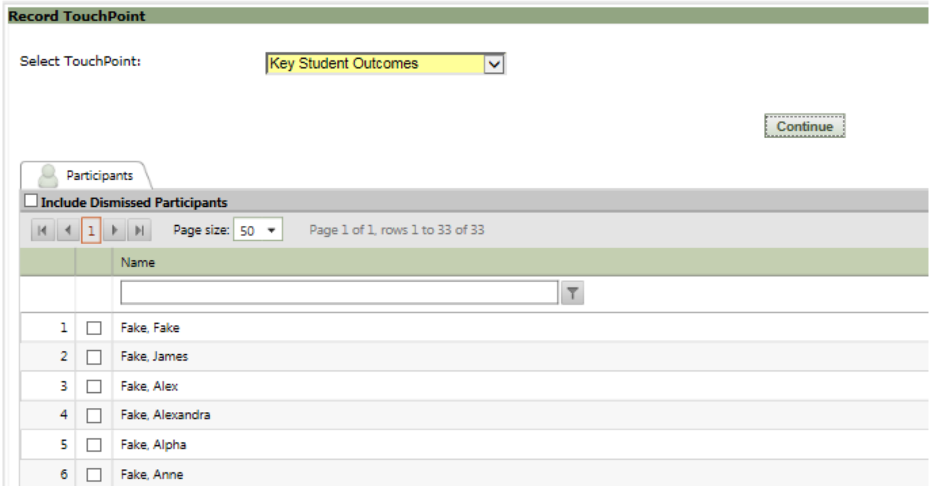


Image 4



Record TouchPoint

Select TouchPoint: Key Student Outcomes

Continue

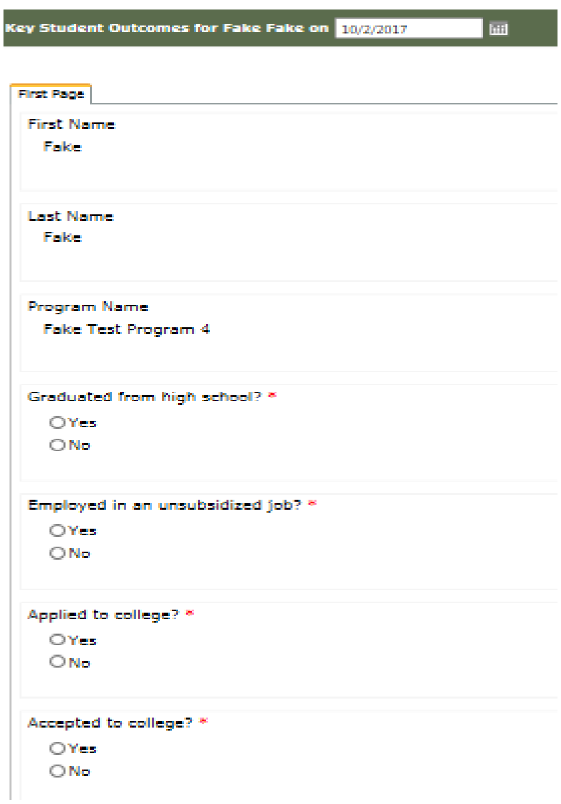
Participants

Include Dismissed Participants

Page size: 50 Page 1 of 1, rows 1 to 33 of 33

		Name
1	☐	Fake, Fake
2	☐	Fake, James
3	☐	Fake, Alex
4	☐	Fake, Alexandra
5	☐	Fake, Alpha
6	☐	Fake, Anne

Image 5



Key Student Outcomes for Fake Fake on 10/2/2017

First Page

First Name
Fake

Last Name
Fake

Program Name
Fake Test Program 4

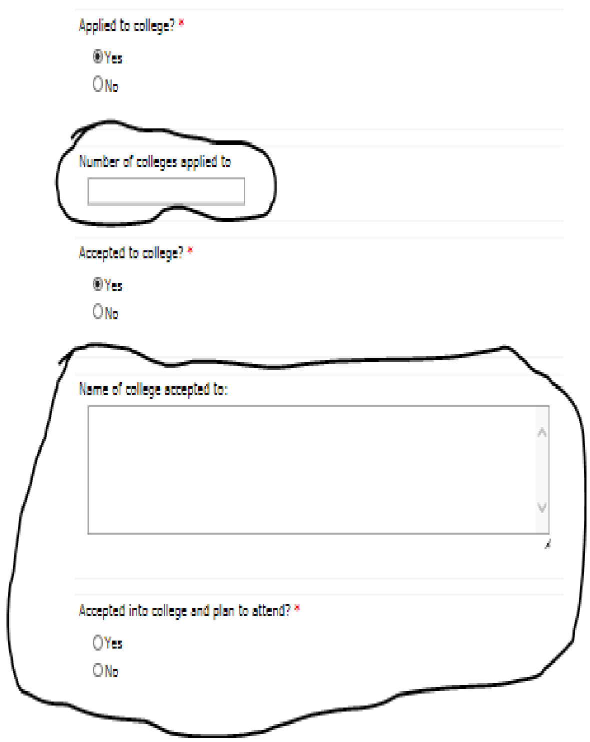
Graduated from high school? *
○ Yes
○ No

Employed in an unsubsidized job? *
○ Yes
○ No

Applied to college? *
○ Yes
○ No

Accepted to college? *
○ Yes
○ No

Image 6



Applied to college? *
◉ Yes
○ No

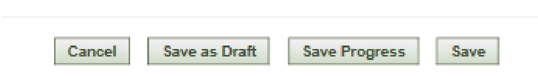
Number of colleges applied to

Accepted to college? *
◉ Yes
○ No

Name of college accepted to:

Accepted into college and plan to attend? *
○ Yes
○ No

Image 7



Cancel Save as Draft Save Progress Save

Running Case Notes and Key Student Outcomes reports

Action	Expected Result
Log in	Welcome page
Select **Reports** on the right side of the screen (image 1)	This will expand and provide a list of report options
Select **View Reports (NEW)** (image 1)	This will bring you to the View Reports screen
Select **Refresh Report List** (image 2)	Select this option when you first open this report. **You will only need to do this once.**
Select **Touchpoint Reports** (image 3)	This will expand and provide a list of touchpoint report options.
Select either (your sites name) **Case Notes** report or **Key Student Outcomes report beginning FY19** (image 3)	This will open up the report selected in ETO Results.
Select the **refresh button** at the top of the page, this button can also be found on the bottom right section of the page. (image 4)	This will re-run the data in this report.
Select the **export button** at the top of the page. (image 5)	This will bring up an export window.
Select .xls or xlsx. file type from the **File Type** drop down list. Select **OK** from the bottom of the screen. (image 6)	This will open up an excel sheet with the data from the

Image 1

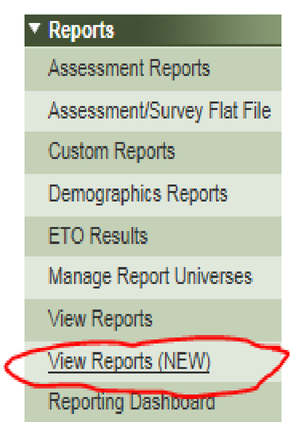


Image 2

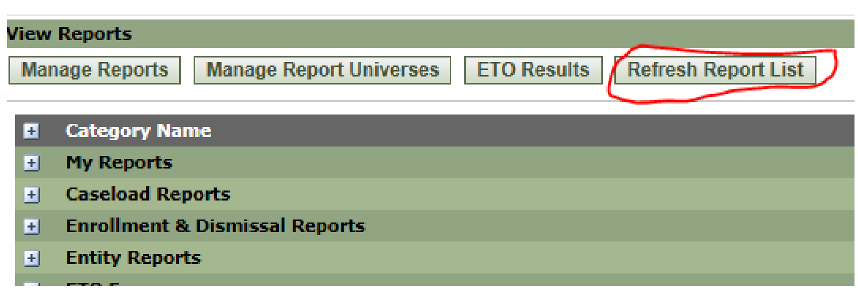


Image 3

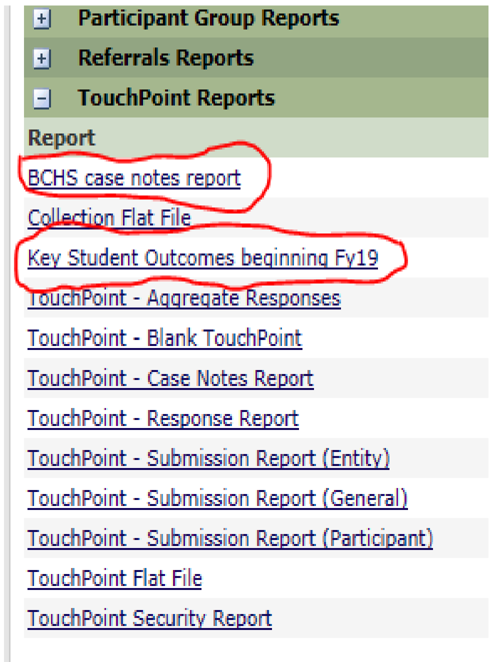


Image 4

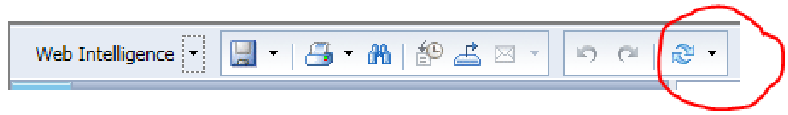
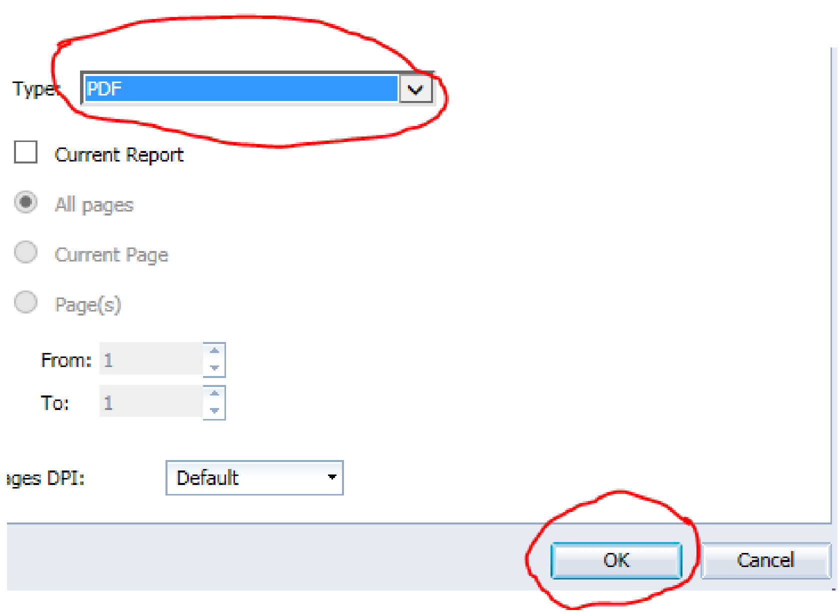


Image 5

Image 6



Need Further Assistance?

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

Casey Castro, **Outcome and Quality Associate**
ccastro@nycmissionsociety.org
(212) 674-3500 x204

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