

ETO TARGETED WEBINAR

# Troubleshooting TouchPoint Data Visibility



# Meet Your Trainer

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# Learning Objective

This session will provide users understand the tools that govern TouchPoint data visibility within ETO.

# Agenda

Intro

Troubleshooting Data  
Visibility

Modifying data visibility


# Intro

# Intro

- Visibility controlled by Administrator
- TouchPoint Security
- Varies for each TouchPoint

### Review TouchPoints

Review TouchPoints for [Able, Joe](#)

TouchPoint Name	
<input type="text"/>	
+ Build Trusting Relationships	<a href="#">Take New</a>
+ Case Notes	<a href="#">Take New</a>
+ Clinical Case Note	<a href="#">Take New</a>
+ Computer Lab Attendace	
+ Intake and Screening	
+ Quarterly Grades	<a href="#">Take New</a>
+ School Engagement Scale	<a href="#">Take New</a>
+ Workshop Attendance	

[Take New TouchPoint](#)

# Troubleshooting Data Visibility

# Troubleshooting TouchPoint Data Visibility

## Data not showing in ETO

- Verify you're logged into the right program?

The screenshot displays a user interface for a case management system. At the top right, the user is identified as 'Jamie Casemanager Staff'. The main content area is divided into three sections:

- Participant Information:** Shows details for Jimmy Laughlin, including first name, last name, and case number (12344).
- Family Information:** Lists family members: Rae Laughlin (Parent, Head of Household), Emelia Laughlin (Child), and Jimmy Laughlin (Step Parent).
- Recent TouchPoints:** A table listing recent touchpoints for Jimmy Laughlin.

Take Action	TouchPoint	Dashboard Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Last Updated By	Attribu Staf Nam
	Build Trusting Relationships		Social Work Center	<a href="#">Laughlin, Jimmy</a>	Participant		3/13/2024	3/27/2024	3/27/2024	Sabrina Gilbert	
	Build Trusting Relationships		Social Work Center	<a href="#">Laughlin, Jimmy</a>	Participant		3/6/2024	3/27/2024	3/27/2024	Sabrina Gilbert	
	School Engagement Scale		Social Work Center	<a href="#">Laughlin, Jimmy</a>	Participant		3/4/2024	3/27/2024	3/27/2024	Sabrina Gilbert	

Below the touchpoints, there is a '+ New' button and a 'Programs' section with the following table:

Program Name	Start Date	End Date	Reason for Dismissal
<a href="#">Social Work Center</a>	4/8/2024	Pending	
<a href="#">Social Work Center</a>	3/1/2024	3/27/2024	Moved Away
<a href="#">Healthy Living</a>	5/2/2023	Pending	



# Troubleshooting TouchPoint Data Visibility

## Data not showing in ETO

- Verify you're logged into the right program?
- Try View Participant TouchPoints

Review TouchPoints

Review TouchPoints for [Laughlin, Jimmy](#)

TOUCHPOINT NAME	
<input type="text"/>	
+ Build Trusting Relationships	<a href="#">Take New</a>
+ Connectedness	<a href="#">Take New</a>
+ School Engagement Scale	<a href="#">Take New</a>
+ Workshop Attendance	<a href="#">Take New</a>

[Take New TouchPoint](#)

# Troubleshooting TouchPoint Data Visibility

## Data not showing in ETO

- Verify you're logged into the right program?
- Try View Participant TouchPoints
- Ask admin to grant you access to View Other's data via TouchPoint Security

The top screenshot shows the user Sabrina Gilbert viewing the participant information for Jimmy Laughlin. The 'Recent TouchPoints' table lists several touchpoints, with the 'Photo Contest' touchpoint highlighted by a red box. The bottom screenshot shows the user Jamie Casemanager Staff viewing the same participant information. The 'Recent TouchPoints' table lists several touchpoints, with the 'Build Trusting Relationships' touchpoint highlighted by a red box and a red question mark next to it.

Take Action	TouchPoint	Dashboard	Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Last Updated By	Attribu Staf Nam
	Connectedness			Social Work Center	Laughlin, Jimmy	Participant		5/2/2024	5/2/2024			
	Photo Contest			Healthy Living	Laughlin, Jimmy	Participant		5/2/2024	5/2/2024			
	Build Trusting Relationships			Social Work Center	Laughlin, Jimmy	Participant		4/28/2024	5/2/2024			
	Build Trusting Relationships			Healthy Living	Laughlin, Jimmy	Participant		4/23/2024	5/2/2024			
	Build Trusting Relationships			Social Work Center	Laughlin, Jimmy	Participant		3/13/2024	3/27/2024	3/27/2024	Sabrina Gilbert	
	Build Trusting Relationships			Social Work Center	Laughlin, Jimmy	Participant		3/6/2024	3/27/2024	3/27/2024	Sabrina Gilbert	
	School Engagement Scale			Social Work Center	Laughlin, Jimmy	Participant		3/4/2024	3/27/2024	3/27/2024	Sabrina Gilbert	

# Keep In Mind

- ETO Results Reports return data based on TouchPoint Security
- Includes Standard Reports built on Webi platform as well as Custom Results Reports built by your admin.
- Not seeing data you expect to see?
  - Verify TouchPoint Security on View Other's tab FIRST



# Modifying Data Visibility

# Modifying TouchPoint Data Visibility

- ETO Administrators and higher
- Manage TouchPoints feature
- Unique for each TouchPoint, Subject, Program and User

The screenshot shows the 'Security for Photo Contest' configuration page. At the top, there are tabs for 'Add/View/Edit/Delete Own Responses', 'View/Edit/Delete Others' Responses' (which is selected and highlighted with a red box), 'Share Responses Within Site', and 'Share Responses Across Enterpris'. Below these are sub-tabs for 'View Others' Responses' (highlighted with a red box), 'Edit Others' Responses', and 'Delete Others' Responses'. A dropdown menu is set to 'Participant'. A note states: 'Note: Changes will not be saved until you click "Save". Clicking the cl'. Below the note, there are two checkboxes: 'Include disabled sites and programs' and 'Apply settings to Edit and Delete sub tabs'. The main content is a table with columns for 'Site', 'Enterprise Manager', 'Site Manager', 'Department Head', 'Program Manager', and 'Staff'. The 'Site: XYZ Services' row is highlighted with a red box. Below it, a table shows program-level settings for 'Healthy Living', 'Intake', 'Parents As Teachers', and 'Social Work Center'.

Site	Enterprise Manager	Site Manager	Department Head	Program Manager	Staff
Site: April 2024 Admin Foundations					
Site: ETO Admin HOL					
Site: February 2024 Admin Foundations					
Site: January Admin Foundations					
Site: March 2024 Admin Foundations					
Site: Reports					
Site: XYZ Services					
Program					
Healthy Living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intake	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parents As Teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Work Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Additional Resources

# Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities



Build confidence & knowledge in  
our software!

# Customer Support

**Reach out to our Customer Support Team with Questions or Concerns.**

Weekdays 7am – 7pm CST via chat or through email: [eto@bonterratech.com](mailto:eto@bonterratech.com)



# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you  
in future trainings.