

Data Entry in ETO Webinar

We will begin shortly

Meet Your Trainer

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Learning Objective

This session will support users in understanding best practices for recording TouchPoints & Referrals in ETO.

Agenda

Intro

Participant TouchPoints

Multiple Participant TouchPoints

Tracking Referrals


Intro

Intro

- Track time spent with Participants
- Track progress towards outcomes
- Extension of demographics

Review TouchPoints

Review TouchPoints for [Able, Joe](#)

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

[Take New TouchPoint](#)

Participant TouchPoints

Participant TouchPoints

Quick search the individual

Accessed via Participant Dashboard

+New button in Recent TouchPoint part

Select desired form and fill it in

The screenshot displays a participant dashboard for Joe Able. It is divided into three main sections: Participant Information, Recent TouchPoints, and Programs.

Participant Information: Shows a profile for Joe Able with a cartoon avatar. Below the avatar, the following details are listed:

- Address1: 101 Chestnut Ave
- ZipCode: 12345
- City, State: Schenectady, NY
- EEmail: joeable@example.com
- CaseNumber: 54321
- DOB: 4/3/1998
- Age: 23 years
- CellPhone: (212) 989-2129
- Alert: (no specific details)

A [View/Edit Participant](#) link is provided at the bottom.

Recent TouchPoints: Titled "Joe Able's Recent Clinical Case Note", it contains a table with the following data:

Take Action	TouchPoint	Date Completed	Approval Status
	Clinical Case Note	2/3/2021	Pending

A **+ New** button is located below the table.

Programs: A table listing various programs with their start and end dates and reasons for dismissal.

Program Name	Start Date	End Date	Reason for Dismissal
HOL Instructor Program	5/6/2021	Pending	
HOL Instructor Program	8/20/2020	5/6/2021	Graduated
Buddy's Pet Friendly Place	3/26/2020	Pending	
Program 5	2/22/2020	Pending	
Intake - Reentry	12/12/2019	Pending	
Food Pantry (disabled)	10/8/2019	Pending	
Alerts- User 2	8/2/2017	Pending	
Alerts	7/28/2017	Pending	
Case Management	12/18/2016	Pending	
Intake and Screening (disabled)	10/3/2016	Pending	

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Participant TouchPoints


Eye ball icon – read only

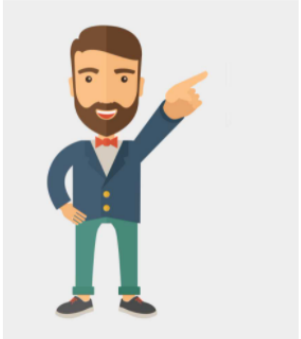
Pencil icon – edit and make changes

Plus icon – new entry

Trash can – delete entry


Participant Information





 **Joe Able**



Address1: 101 Chestnut Ave
ZipCode: 12345
City, State: Schenectady, NY
EEmail: joeable@example.com
CaseNumber: 54321
DOB: 4/3/1998
Age: 23 years
CellPhone: (212) 989-2129
Alert:
[View/Edit Participant](#)


Recent TouchPoints

 **Joe Able's Recent Clinical Case Note**

Take Action	TouchPoint	Date Completed	Approval Status
   	Clinical Case Note	2/3/2021	Pending

[+ New](#)

Programs

 **Programs**

Program Name	Start Date	End Date	Reason for Dismissal
HOL Instructor Program	5/6/2021	Pending	
HOL Instructor Program	8/20/2020	5/6/2021	Graduated
Buddy's Pet Friendly Place	3/26/2020	Pending	
Program 5	2/22/2020	Pending	
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[Review All \(11\)](#)

Participant TouchPoints

Dashboard has Most Recent TouchPoints

View Participant TouchPoints shows all history

Review TouchPoints

Review TouchPoints for [Able, Joe](#)

TouchPoint Name

- + Build Trusting Relationships [Take New](#)
- + Case Notes [Take New](#)
- + Clinical Case Note [Take New](#)
- + Computer Lab Attendance
- + Intake and Screening
- + Quarterly Grades [Take New](#)
- + School Engagement Scale [Take New](#)
- + Workshop Attendance

[Take New TouchPoint](#)

Multiple Participant TouchPoints

Multiple Participant TouchPoints

Collect data for several participants at once

Data entry time saver

Drop in meetings or one time groups

The screenshot displays a software interface for tracking attendance on 7/15/2021. On the left, a list of participants is shown, including 'Able, Joe', 'Bryan, Luke', 'Hollywood, Paul', 'Jones, Melissa', 'League, Justin', and 'Montgo, Artemis', along with an 'Add' button. The right side features a form with the following sections:

- Subject Covered:** A dropdown menu set to 'Interview Skills'.
- Attendance:** A dropdown menu set to 'Present'.
- Workshop Schedule:** Two rows of time selection. The first row is 'Workshop Begin Time' with values 01, 00, and PM. The second row is 'Workshop End Time' with values 02, 30, and PM.
- Total Time in Workshop:** A field showing 'Hours 1 : 30 Minutes'.
- Signature:** A section with a 'Sign' button and a signature line.

Tracking Referrals

Tracking Referrals

Used 2 ways

- Referral to internal Program in ETO
- Referral to 3rd party partner

Add Referral

Select Participants

First Page

Cell Phone
(212) 989-2129

Annual Income

Has the participant received utility assistance before?

Yes
 No

Clear Selection

Type of housing
Apartment

Date of Shutoff:
8/5/2021

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

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.