

Welcome to the Navigating 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 navigating in ETO.

Agenda

Intro to ETO

Navigation via Quick Search

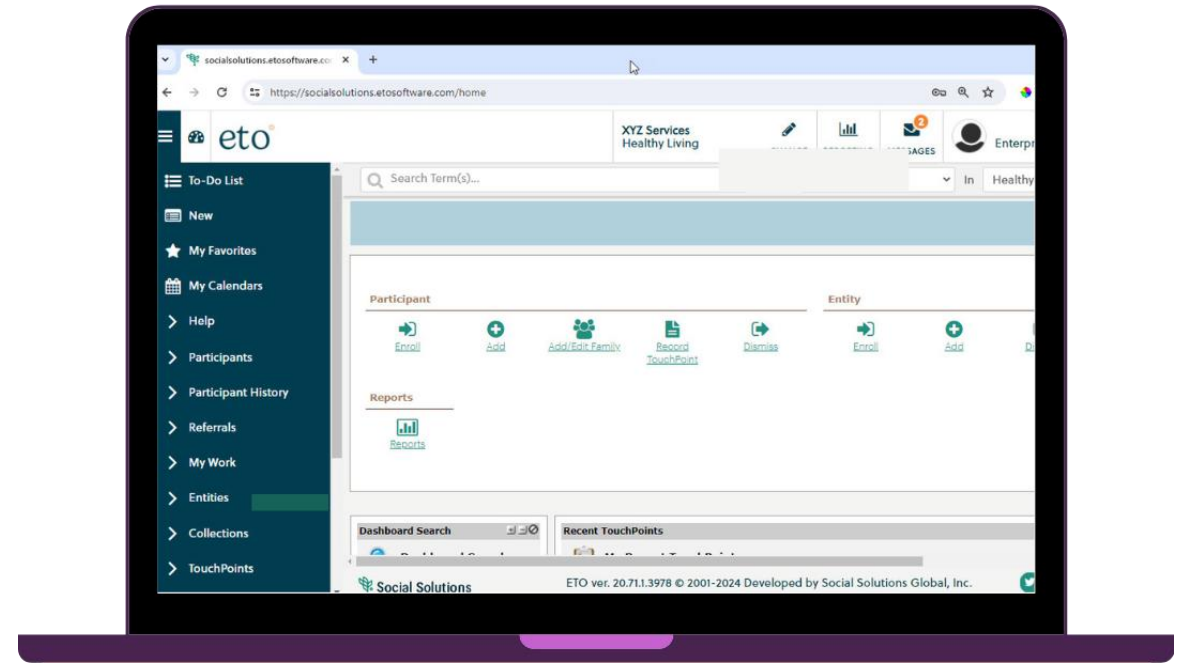
Dashboards in ETO

The Navigation Bar

Intro to ETO

Intro to ETO

- Stands for Efforts To Outcomes
- Relationship between daily work & outcomes
- Optimize performance and increase impact

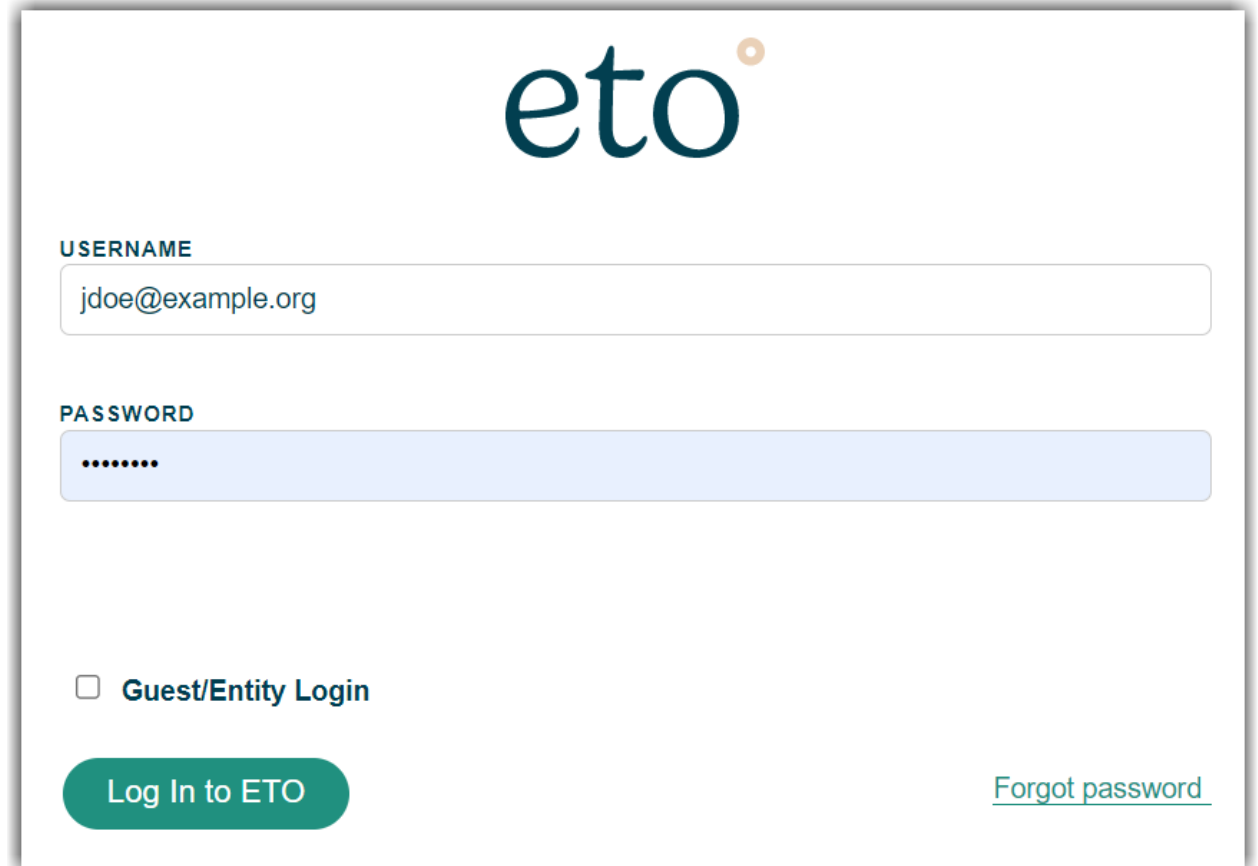


Intro to ETO

Log in at etosoftware.com

Username : your email address

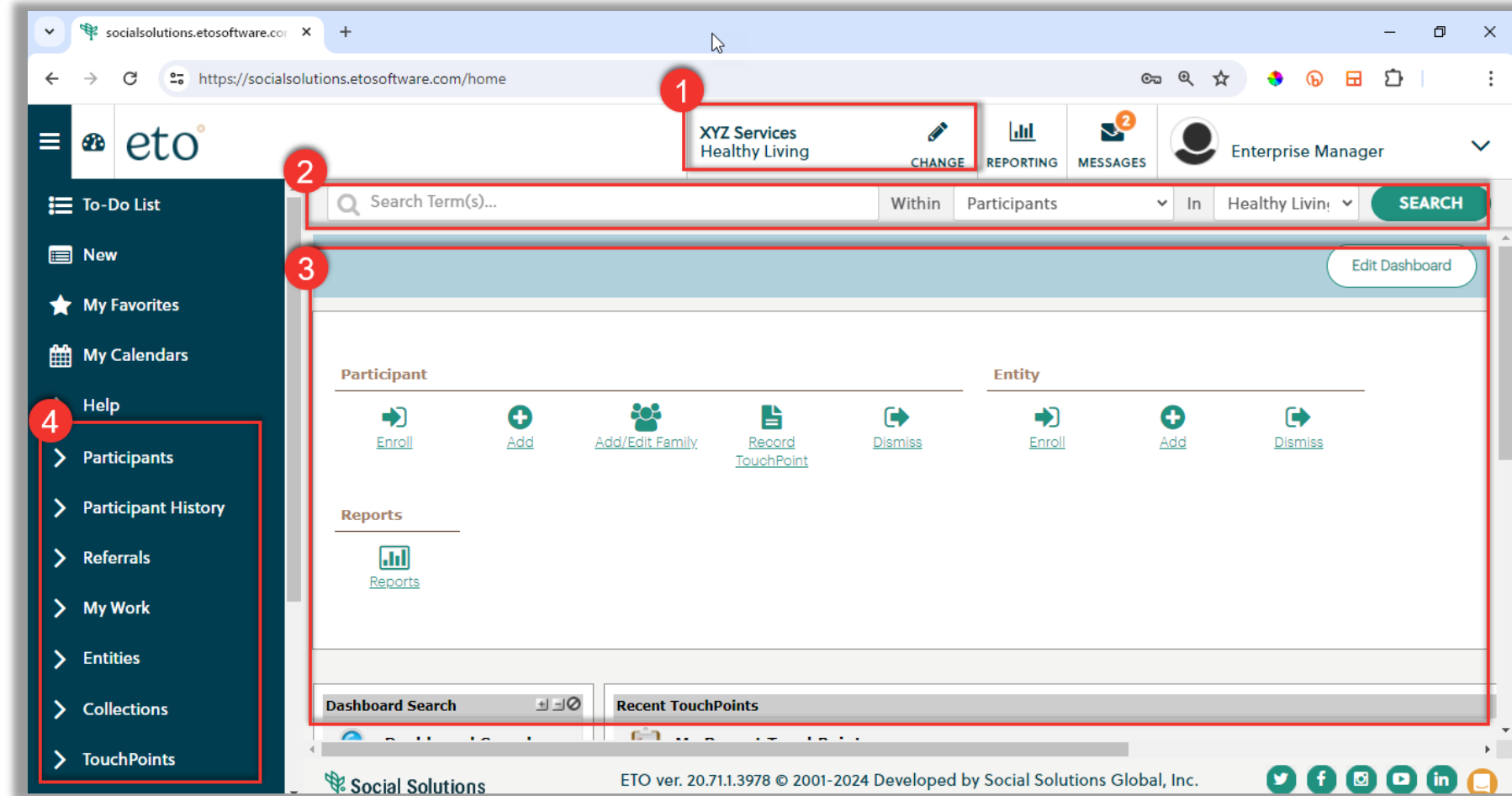
Password: provided by your ETO Administrator



The screenshot shows the ETO login interface. At the top center is the 'eto' logo in a dark teal font with a small orange circle above the 'o'. Below the logo are two input fields. The first is labeled 'USERNAME' and contains the text 'jdoe@example.org'. The second is labeled 'PASSWORD' and contains seven black dots. Below the password field is a checkbox labeled 'Guest/Entity Login'. At the bottom left is a green rounded button with the text 'Log In to ETO'. At the bottom right is a blue underlined link that says 'Forgot password'.

Intro to ETO

1. Site & Program details
2. Quick Search bar
3. Dashboard
4. Navigation Bar



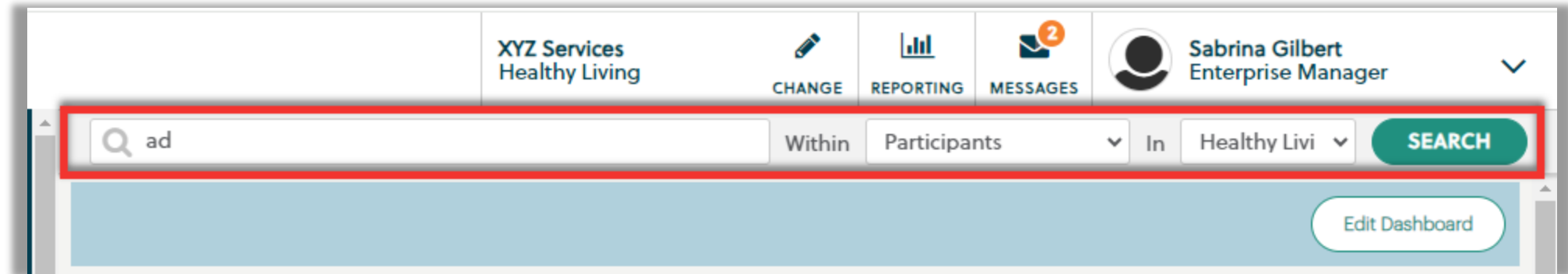
Navigating via the Quick Search

Navigating via the Quick Search

Always at the top

Quickly access specific individual

Great for viewing history or new data entry

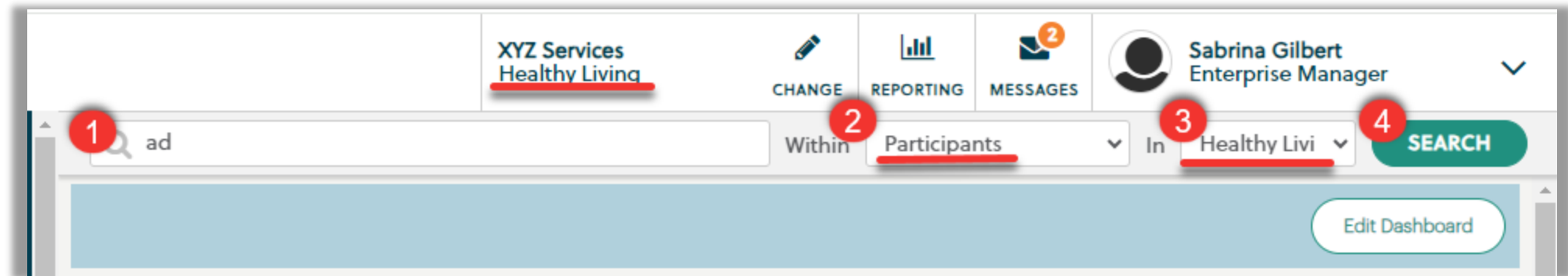


Navigating via the Quick Search

Search existing records

Active in current program by default

Partial name improves search parameters



Navigating via the Quick Search

Generates 2 Lists

Click Name to view Quick Search Menu

Click action link to take action

The screenshot shows a web application interface for a Quick Search. At the top, there is a search bar with the text 'ad', a dropdown menu set to 'Within Participants', and another dropdown set to 'In Healthy Living'. A green 'SEARCH' button is on the right. Below the search bar, a blue header reads 'Quick Search Results'. Underneath, it says 'Matches for: ad' and 'Total Participants: 8'. A section titled 'FILTERED BY' has two expandable sections: 'First Name' and 'Last Name'. The 'First Name' section is expanded, showing a table with columns: PARTICIPANT NAME, CASENUMBER, DOB, and PROGRAM START DATE. The first row is 'Wilson, Wade' with CASENUMBER 11457, DOB 8/29/1994, and PROGRAM START DATE 10/27/2022. Below the table are pagination controls showing '1' of 1 items per page. The 'Last Name' section is also expanded, showing a similar table. The first row is 'Adams, Alexander' with CASENUMBER 10392, DOB 4/7/2005, and PROGRAM START DATE 12/13/2015. A red box highlights the name 'Adams, Alexander' in the first row of the 'Last Name' table. A red arrow points from a red callout box containing the text 'Click a name to see action menu' to the highlighted name. Below the name, a dropdown menu is visible with the following items: 'Alexander Adams's Dashboard', 'View / Edit', 'View / Record TouchPoint', 'Program History', and 'Dismiss from program'. At the bottom of this menu are 'More' and 'Close' buttons. The footer of the page includes the 'Social Solutions' logo, the version 'ETO ver. 20.71.1.3978 © 2001-2024 Developed by Social Solutions Global, Inc.', and social media icons for Twitter, Facebook, Instagram, YouTube, LinkedIn, and WhatsApp.

PARTICIPANT NAME	CASENUMBER	DOB	PROGRAM START DATE
Wilson, Wade	11457	8/29/1994	10/27/2022

PARTICIPANT NAME	CASENUMBER	DOB	PROGRAM START DATE
Adams, Alexander	10392	4/7/2005	12/13/2015
Alexander Adams's Dashboard	123	7/6/1980	8/17/2021
View / Edit	11581	12/1/2008	1/23/2023
View / Record TouchPoint	12195	4/28/2019	1/8/2024
Program History	12192	12/11/1979	1/8/2024
Dismiss from program	12194	4/4/2008	1/8/2024
More	11903	7/25/1989	8/1/2023

Dashboards in ETO

Dashboards in ETO

Several Dashboards:

- Staff Dashboard*
- Participant Dashboard*
- Family Dashboard
- Collection Dashboard
- Entity Dashboard


Staff Dashboard in ETO

Your recent data entry

Action Links

Customized by Admin

My Caseload


 My Caseload

[+ Add](#) [Transfer](#)

Customized by your ETO Admin based on how your program works


PARTICIPANT	CASEWORKER RELATIONSHIP	CASELOAD STATUS	START DATE	TAKE ACTION
Joe Able	Primary	Active	6/8/2021	✕
Sharon Anderson	Primary	Active	6/8/2021	✕

Dashboard Search

 Dashboard Search

Dashboard Search:

Recent Participants/Entities


 Recent Participants



















Name

[Gabby Wilson](#)

[Anthony Green](#)

Recent TouchPoints

 My Recent TouchPoints

Take Action	TouchPoint	Collection	Program	Name	Subject Type	Date Completed	Date Last Updated	Audit Creation Date	Last Updated By
   	2021 Q1 Attendance	Day Care Center	HOL Instructor Program	Greenmount Help Center	Entity	6/9/2021	6/9/2021	6/9/2021	Training Demo
   	2021 Q1 Attendance	Day Care Center	HOL Instructor Program	Brooklyn DSS	Entity	6/9/2021	6/9/2021	6/9/2021	Training Demo
   	2021 Q1 Attendance	Day Care Center	HOL Instructor Program	Bakery Fakery	Entity	6/9/2021	6/9/2021	6/9/2021	Training Demo
   	2021 Q1 Attendance	Day Care Center	HOL Instructor Program	Artemis' Dog Service Therapy	Entity	6/9/2021	6/9/2021	6/9/2021	Training Demo
 	Build Trusting Relationships		Case Management	Smith, Jared	Participant	5/6/2021	5/6/2021	5/6/2021	Training Demo

[+ New](#)


Participant Dashboards in ETO

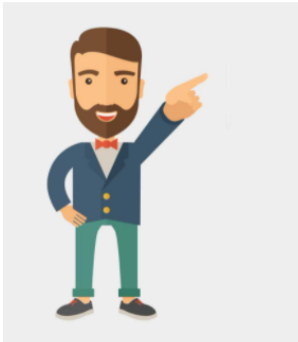
Recent data entry

Action Links

Customized by Admin


Participant Information





 **Joe Able**



Address1: 101 Chestnut Ave
ZipCode: 12345
City, State: Schenectady, NY
E-Mail: 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 Program 5	3/26/2020	Pending	
Intake - Reentry	2/22/2020	Pending	
Food Pantry (disabled)	12/12/2019	Pending	
Alerts- User 2	10/8/2019	Pending	
Alerts	8/2/2017	Pending	
Case Management	7/28/2017	Pending	
Intake and Screening (disabled)	12/18/2016	Pending	
Intake and Screening (disabled)	10/3/2016	Pending	

Page: [1](#) [2](#)

[Review All \(11\)](#)

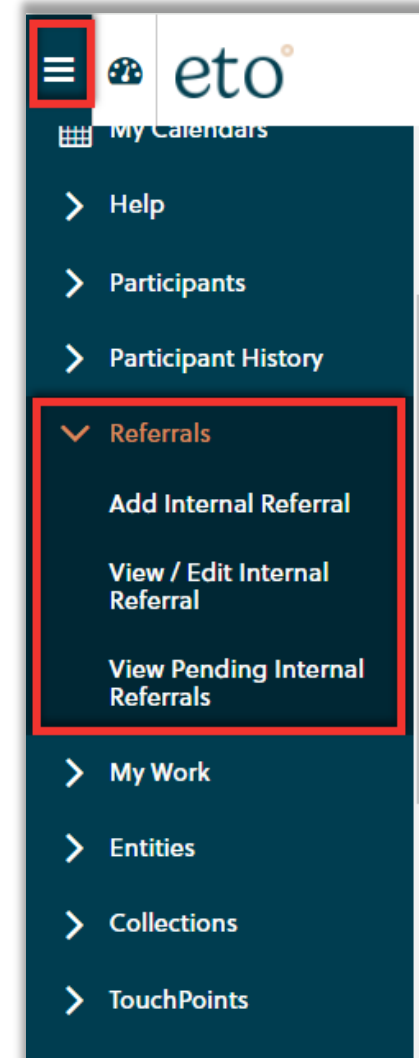
The Navigation Bar

The Navigation Bar

Feature links grouped by component

Takes time to get familiar with

Used for features not on the dashboard.



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.