

## ETO QUICK REFERENCE GUIDE

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**June 2015**

Children and Family Services Division  
California Department of Social Services  
[www.childsworld.gov](http://www.childsworld.gov)



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## Logging into ETO Software

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### The Login Screen

Your ETO Web Address is <https://secure.etosoftware.com>. The login screen contains two fields: Username and Password. Your ETO Administrator will provide this information to you.

Once you enter in your username and password, you will be prompted to change your password and update your profile information.

You will also be required to agree to **Social Solutions' Terms of Use**. This is the only time that you will see the Terms of Use. Once you've completed the required information, click the **"Save"** button and you will be logged in to ETO.

First Name:

Last Name:

Zip Code:

Email Address:

Time Zone:

New Password:

Confirm Password:

I agree to the Social Solutions [Terms of Use](#).

ETO™ software  
Welcome!

Please confirm your information and reset your password to the left.

If you're brand new to ETO or are just looking to learn more, start with our [interactive trainings](#) or sign up for a [training with a live instructor](#).

Performance management is about understanding the impact of your efforts and using this knowledge to continuously improve your performance. Social Solutions is ready to help you with your ETolution!

### Forgotten Password

If you forget your password there are three ways to reset it:

1. Use the **"Forgot Password"** link on the login screen. This will send a temporary password to the email address attached to your user account.
2. Ask your ETO Administrator to reset your password.
3. Contact Social Solutions Support. Use this option only as a last resort.

If you receive a message that says "Please contact your system administrator, you might not be assigned to any programs. Contact your ETO Administrator and request program access. A user must be assigned to at least one program to access ETO.

### Logging Off

Click **"Log Off"** to securely end your ETO session. Doing so will prevent others from accessing your data. It also ensures that the time you spend in ETO is captured properly.

## Hardware and Software Compatibility

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ETO Software runs on Windows computers and is not compatible with Apple computers unless they are configured to operate Windows. You must contact the Social Solutions customer support team to learn options available to Apple users.

## Browser Compatibility

ETO Software works best with Internet Explorer Version 8 or higher. Note: Using other browsers such as Firefox, Google Chrome, Safari, etc., allows login, however does not have the ability to save data.

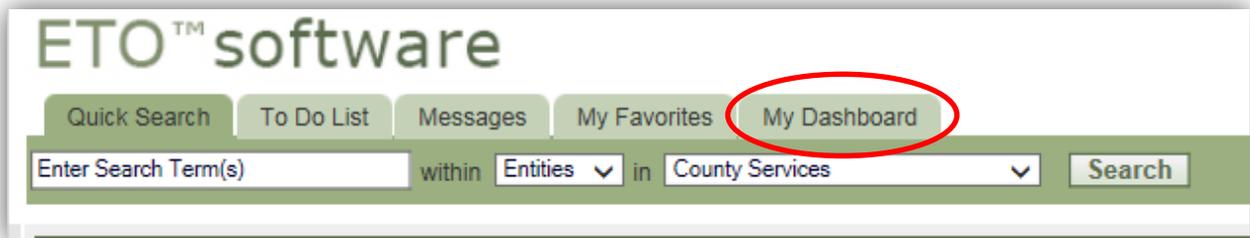
## ETO Tips

- ▶ Avoid using the Internet's back button
- ▶ ETO will timeout after 60 minutes of inactivity
- ▶ Be sure to Log out when you are finished

## Basic Navigation

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After logging in to ETO you'll see several tabs at the top left of your screen. The most frequently used tab is the **My Dashboard** tab.



Below is a listing of each of the tabs and their purpose:

- ▶ Quick Search Tab: Search active counties in your program and complete TouchPoints.
- ▶ To Do List Tab: This takes you to your personal (i.e. your user account) To Do List, which shows reminders that you set on TouchPoints.
- ▶ Messages Tab: A place to create or read messages from you, your consultant or your ETO Administrator.
- ▶ My Favorites: A list of custom reports created by your ETO Administrator.
- ▶ My Dashboard: This dashboard is YOU centric — see everything related to your work in the software.

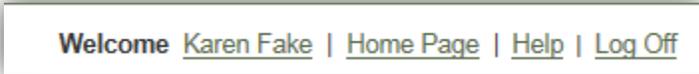
## The Navigation Bar

The navigation bar is located on the right side of your screen. It has most of the same features as your Dashboard, however it is rarely needed. By default the Navigation Bar is in a collapsed position.



## Basic Buttons

You will also see several links at the top right area of your screen.



Below is a listing of each of the links and their purpose:

- ▶ Your Name: Allows you to access and control your user account's settings, email address and password.
- ▶ Home Page: Use this button to route back to your homepage from any other page in the software. Be sure to submit/save your data before doing this!
- ▶ Help: Allows users to access the online ETO Help Manual, training resources and connect with the support team.
- ▶ Log Off: Be sure to click this to properly log out of ETO, keeping your site secure and data safe. Do NOT just exit out of your Internet Explorer browser.

## Dashboards

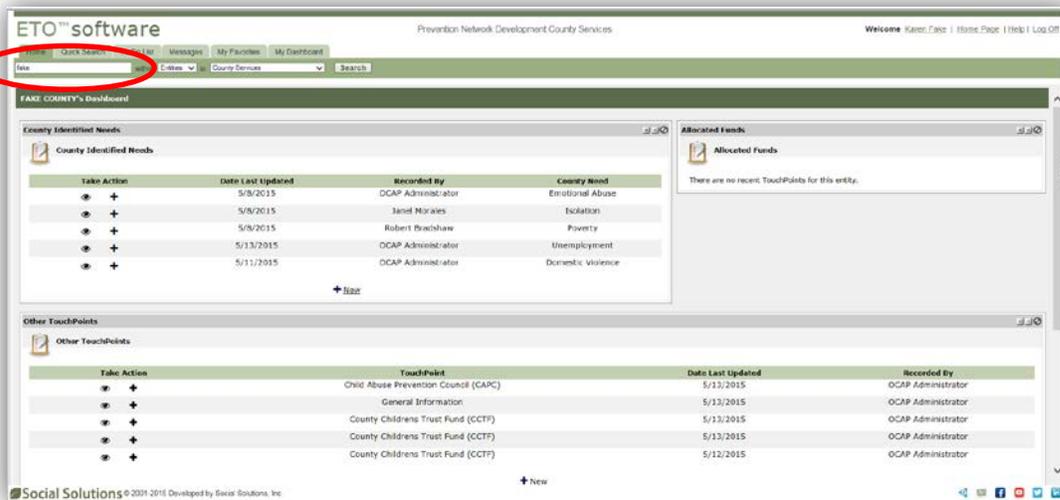
After successfully logging into ETO, you will be directed to the "My Dashboard" page by default. This shows you a summary of *only your* most recently entered TouchPoints along with different types of information such as OCAP Terms and Conditions, County Contact Information, etc.

## My Dashboard



## Entity Dashboard

You also have an “Entity Dashboard.” This shows you a summary of work entered on behalf of the County by any user. One way to access the Entity Dashboard is to use the Quick Search tab on your menu bar.



## TouchPoints Defined

TouchPoints may be entered through a variety of navigation methods and may be taken in any order. It is likely that you will enter TouchPoints from either “My Dashboard” or the “Entity (County) Dashboard”. Once you complete a TouchPoint, you can easily edit, view, add, or delete a TouchPoint that you have recorded.

Currently, there are a total of ten different County Service TouchPoints. You will be completing one TouchPoint for *each service*. The TouchPoints marked with an asterisk need only to be recorded one time or on an “as-needed” basis; such as changes in staff, change in county needs, etc. The TouchPoints are listed as follows:

1. Terms and Conditions\*
2. County Contact\*
3. General Information\*
4. County Need\*
5. County Funding Allocations
6. Service Activity and Funding Stream (Primary form)
7. Evidence Based/Informed Checklist (Sub form)
8. Child Abuse Prevention Month
9. Child Abuse Prevention Council (CAPC)
10. County Children’s Trust Fund (CCTF)

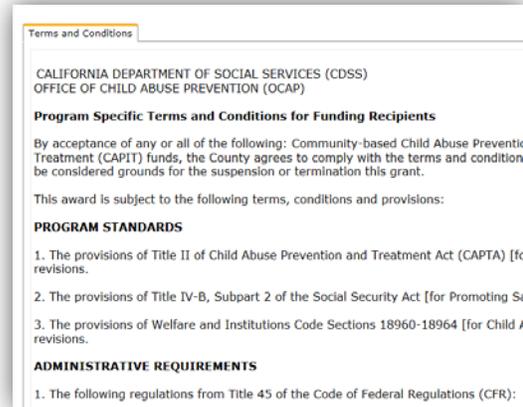
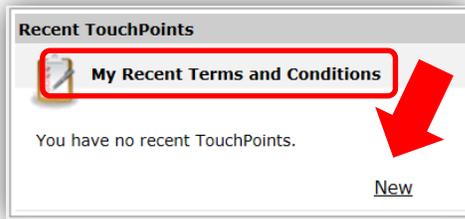
## TouchPoints to be Recorded

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### I. OCAP Terms and Conditions

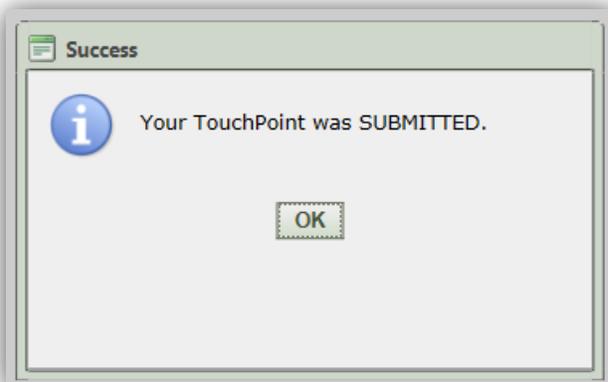
The first TouchPoint that you should complete is the **Terms and Conditions** TouchPoint. You only need to do this once. If someone from your agency has already agreed to the Terms and Conditions, you may skip this step.

To record this TouchPoint, click on the **“New”** link in the **“My Recent Terms and Conditions”** window.



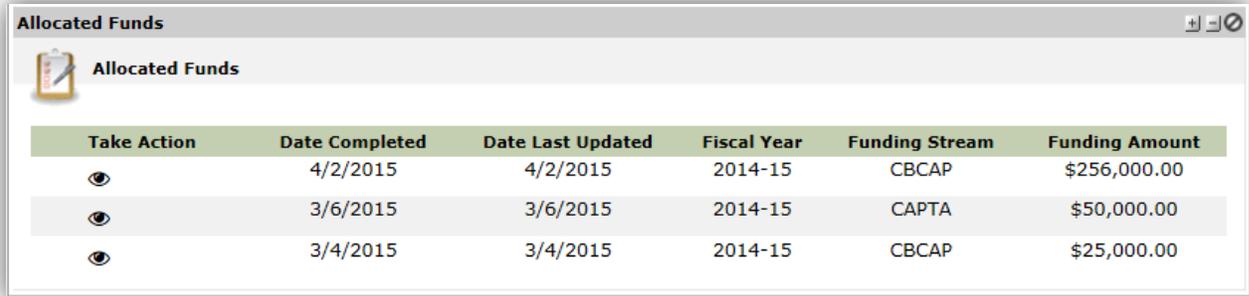
Please read through these terms. Click the **“I agree”** at the bottom of the form. Complete the remaining fields; name, address, phone, and email and then click the **“Save”** button.

Once you have successfully recorded a TouchPoint, you will receive a pop-up window showing that your TouchPoint has been successfully recorded and submitted.



## II. County Funding Allocation TouchPoint

On the Entity Dashboard you will see the **County Funding Allocation** TouchPoint. This information will be uploaded by your ETO Administrator as the funds become available.



Take Action	Date Completed	Date Last Updated	Fiscal Year	Funding Stream	Funding Amount
	4/2/2015	4/2/2015	2014-15	CBCAP	\$256,000.00
	3/6/2015	3/6/2015	2014-15	CAPTA	\$50,000.00
	3/4/2015	3/4/2015	2014-15	CBCAP	\$25,000.00

## III. County Identified Need TouchPoint (CSA) TouchPoint

This TouchPoint is located on the Entity Dashboard. You may record this TouchPoint for as many needs as your county has identified. If there is more than one County Identified Need, use the **“Save and Record Similar”** button at the bottom of the TouchPoint.



Take Action	Date Last Updated	Recorded By	County Need
	5/6/2015	Karen Fake	Domestic Violence
	5/6/2015	Kelly Sanchez	Substance Abuse
	5/6/2015	Jackie Howe	Neglect
	5/6/2015	Faye Hignight	Substance Abuse
	5/6/2015	Maria del Carmen Covarrubias	Domestic Violence

[New](#)

## Primary and Sub TouchPoints

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In ETO you have one instance where you have a Sub TouchPoint attached to a Primary Touchpoint. Primary and Sub TouchPoints are used for services that always happen in succession of one another. Please note that you cannot record a Sub TouchPoint unless the Primary TouchPoint has been entered. Sub TouchPoints can only be accessed via the Primary TouchPoint Dashboard.

## IV. Service Activity and Funding Stream (Primary TouchPoint)

The Service Activity and Funding Stream is the longest and most likely, the most time consuming of all the TouchPoints to record. Complete the Primary TouchPoint the same way you complete all other TouchPoints: Click the **“New”** link in the Service Activity and Funding Stream Part of the Entity Dashboard.

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Service Activity and Funding Stream					
Take Action	Dashboard	Date Last Updated	Services Category	Service Provider Name	How much being sp
	<a href="#">Service Activity and Funding Stream Dashboard</a>	4/22/2015	Home Visiting	Jewish Family Services of Los Angeles	
					<a href="#">+ New</a>

You'll see several tabs at the top of this TouchPoint window. These tabs are *dynamic*, meaning that depending on your choices, more tabs may appear. For example, if you have CBCAP funding, you will be required to input additional information that relates specifically to CBCAP. Additionally, if CBCAP funds are being used, you will need to record the Evidence Based/Informed Checklist (Sub TouchPoint).

Service Activity and Funding Stream for FAKE COUNTY on 3/4/2015

Service Activity Information
Funding Stream
Service Counts
Activity Outcome
Target Population

Please record this Touchpoint for **each Service** receiving OCAP Funding.

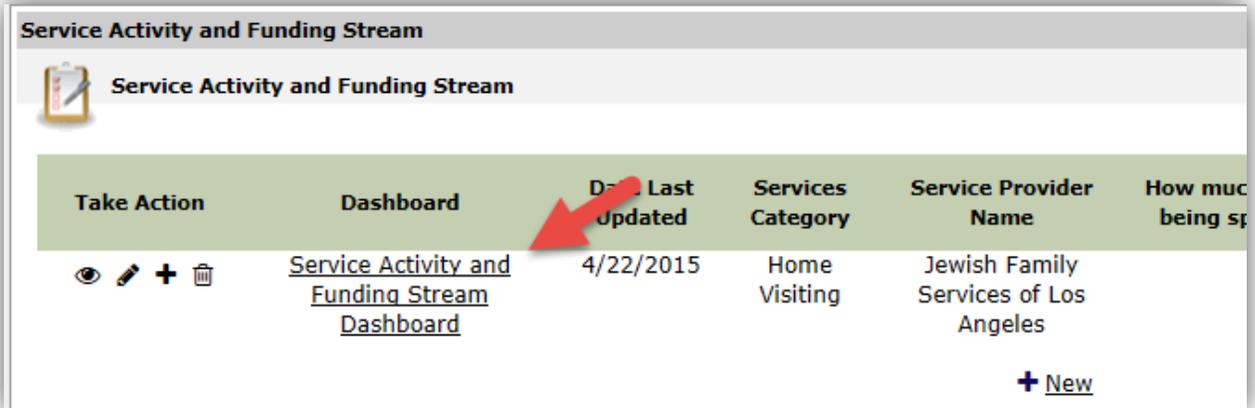
Services Category

-- Select --

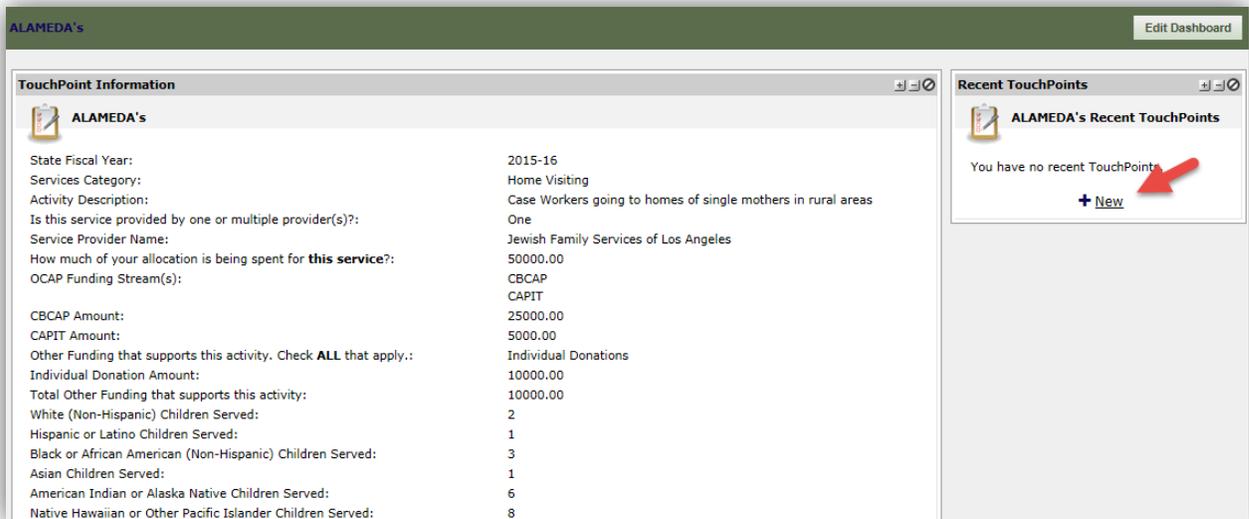
Activity Description

V. Evidence-Based and Evidence-Informed Checklist (Sub TouchPoint)

This TouchPoint need only be completed if you are using CBCAP funds. There are sixteen characteristics to be evaluated. You will only need to answer “yes” or “no” to each question. The level of your program/practice will be automatically calculated by ETO. To Access this TouchPoint you must access it via your **Entity Dashboard** in the section showing the Service and Activity Fund Stream.



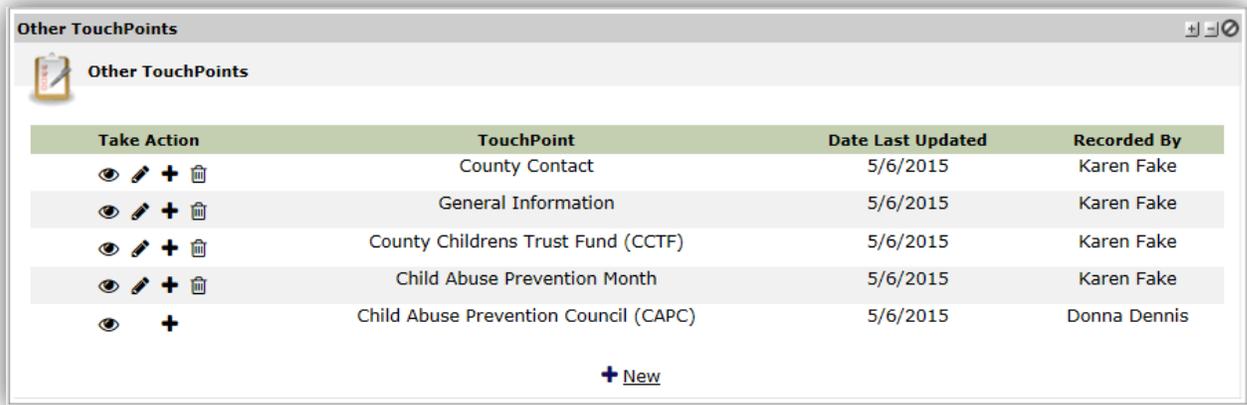
Once you click the link, a new screen will open up showing you a summary of the information you have recorded for the Service Activity TouchPoint. Click the “**New**” link on the right side of the screen; this will launch the Evidence-Based Checklist TouchPoint.



## Other TouchPoints

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There are five Other TouchPoints to be recorded. These are available via the **Entity Dashboard** in the section labeled “**Other TouchPoints**”.



Take Action	TouchPoint	Date Last Updated	Recorded By
	County Contact	5/6/2015	Karen Fake
	General Information	5/6/2015	Karen Fake
	County Childrens Trust Fund (CCTF)	5/6/2015	Karen Fake
	Child Abuse Prevention Month	5/6/2015	Karen Fake
	Child Abuse Prevention Council (CAPC)	5/6/2015	Donna Dennis

[+ New](#)

Other TouchPoints include the following:

1. County Contact
2. General Information
3. County Children’s Trust Fund (CCTF)
4. Child Abuse Prevention Month
5. Child Abuse Prevention Council (CAPC)

To record one of the “**Other TouchPoints**”, click the “**New**” link which will launch a new screen. Click the drop down arrow next to --Select a TouchPoint -- then choose the TouchPoint you want to record.



#### VI. County Contact TouchPoint

This TouchPoint needs only to be entered once for each contact person; or on an “as needed” basis as staffing changes occur. If there is more than one contact person for the entity, use the **“Save and Record Similar”** button at the bottom of the TouchPoint.

#### VII. General Information TouchPoint

The General Information TouchPoint addresses who counties partner with in order to help prevent child abuse and neglect, as well as identifying risk factors, and other general information. This TouchPoint needs only to be entered once, or on an “as needed” basis if changes should occur.

#### VIII. Certification of County Children’s Trust Fund (CCTF) TouchPoint

The Certification of County Children’s Trust Fund TouchPoint is used to capture annual revenue and expenditure amounts including total birth certificate fees. This TouchPoint should be completed once per state fiscal year. Keep in mind each *category* needs to be entered. For example, if a county has birth certificate fees AND Interest, use the “Save and Record Similar” option for each category. Totals are automatically calculated.

#### IX. Child Abuse Prevention Month TouchPoint

This TouchPoint will capture CBCAP funded activities in order to identify activities that provide information or awareness with regards to child abuse and neglect.

#### X. Child Abuse Prevention Council (CAPC) TouchPoint

This TouchPoint will identify the Child Abuse Prevention Councils that have been designated by the County's Board of Supervisors in your county. Record this TouchPoint one time for *each* CAPC. Use the **“Save and Record Similar”** button to record multiple CAPCs.

## Editing TouchPoints

Note the heading labeled “Take Action” to the left of each recorded TouchPoint. From this area, you can update inaccurate, incomplete, or blank fields. The icons represent: View, edit, add similar and delete. Note: Some of the Take Action buttons may not be visible, depending on security settings.

The screenshot displays three panels from a software interface:

- Allocated Funds:** A table with columns: Take Action, Date Last Updated, Funding Stream, Funding Amount, Fiscal Year. It lists two entries: one for CAPTA with a funding amount of \$50,000.00 and another for CBCAP with \$25,000.00. A red box highlights the 'Take Action' icons for both rows.
- County Identified Needs:** A table with columns: Take Action, Date Last Updated, Date Need Identified, County Need. It lists three entries: Other, Neglect, and Domestic Violence, all with a date of 3/4/2015.
- County Services:** A table with columns: Take Action, Date Last Updated, Services Category, Service Provider Name, How much of your allocation is being spent for this service?, OCAP Funding Stream(s), and TOTAL SERVICE COUNT. It lists one entry for Advocacy with a spending amount of \$25,000.00 and a total service count of 64.

To make edits to an existing TouchPoint, click the pencil (edit) icon. This opens a new window where you will see a list of all recorded TouchPoints. In the example below, there have been four TouchPoints completed. Clicking on the plus sign next to the TouchPoint will show additional information, as well as allow you to view, edit, or delete the TouchPoint.

You may also record a new TouchPoint by clicking the “**Take New TouchPoint**” button.

The screenshot shows the "Review TouchPoints" window for "FAKE COUNTY". It features a search bar and a list of four TouchPoints, each with a plus sign icon and a "Take New" button. A red box highlights the plus signs for the first four items:

- Certification of County Childrens Trust Fund (CCTF) (IN PROGRESS) **Take New**
- County Contact **Take New**
- County Funding Allocations **Take New**
- County Need (CSA) **Take New**

At the bottom of the window is a button labeled "Take New TouchPoint".

## Contact Information

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### Customer Support

PND Manager	Angela Ponivas	<a href="mailto:angela.ponivas@dss.ca.org">angela.ponivas@dss.ca.org</a>	916.657.4709
ETO Administrator	Karen Skeoch	<a href="mailto:karen.skeoch@dss.ca.gov">karen.skeoch@dss.ca.gov</a>	916.651.6999
Social Solutions	Customer Support	<a href="mailto:support@socialsolutions.com">support@socialsolutions.com</a>	866.732.3560

### County Consultants

Alpine	Alameda	Fresno	Amador	Inyo
Calaveras	Butte	Glenn	Marin	Kings
Contra Costa	Colusa	Kern	Merced	Madera
El Dorado	Del Norte	Lake	Modoc	Napa
Humboldt	Los Angeles	Lassen	Mono	Placer
Imperial	Mendocino	Monterey	Nevada	Siskiyou
Mariposa	Riverside	Orange	Plumas	Sutter
San Joaquin	San Benito	San Diego	Sacramento	Yuba
Santa Clara	San Francisco	San Mateo	San Bernardino	*
Shasta	Stanislaus	Santa Cruz	San Luis Obispo	*
Solano	Yolo	Sierra	Santa Barbara	*
Trinity	*	Sonoma	Tehama	*
Tulare	*	Ventura	Tuolumne	*
<a href="#">Patricia Harper</a> (916) 651-6711	<a href="#">Anthony Bennett</a> (916) 651-6952	<a href="#">Irma Munoz</a> (916) 657-1797	<a href="#">Mary DeSouza</a> (916) 651-6717	<a href="#">Robert Bradshaw</a> (916) 651-6811

## Glossary

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**Entity** – Your County is considered an entity. Entities have Dashboards and can be accessed via Quick Search.

**Entity Dashboard** - Displays a summary of work entered on behalf of the County by any user.

**ETO** – Efforts to Outcome.

**My Dashboard** – Think of the dashboard as your home page. It is another navigation option. Dashboards provide a picture of the data that you've recently entered into the Software as well as links to edit, add, or enter additional data.

**Navigation Bar** – Also known as the “nav bar.” It's the green bar on the right side of the window. This bar can be collapsed to the right side of your screen by clicking on the small arrow that is pointing to the right.

**TouchPoint** – TouchPoints are data collection tools in ETO that capture all details of interactions and activities. In other words, a TouchPoint is a questionnaire or form that users record data into ETO. All county services will be tracked via TouchPoints in ETO. You can access TouchPoints via the Entity Dashboard.