



ETO Training Workbook

Building a foundation for successful
utilization of ETO Software

ETO Address:

<https://secure.etosoftware.ca/login.aspx?ETO=cups>

User Manual: _____

Module 01: Intro

In this module...

1. What is ETO?
2. Login Best Practices
3. Other CUPS Databases

What is ETO?

ETO is the primary database we use at CUPS for **using** information, **recording** information and **reporting** back to the community.



ETO is a robust system developed by Social Solutions. It provides the infrastructure and scalability needed for large, multifaceted organizations to effectively manage their data, share information and track progress in a secure environment.



Facts and Impact

CUPS has used ETO since 2012. We have over 60,000 different data points, over 20,000 unique participants stored in the database and over 1,800 Entities connections.

CUPS uses ETO with 28 different programs/services . We have approximately 125 users and 2 main administrators.

The average user spends over 6 hours daily on ETO.

What is ETO?

ETO means “**Efforts to Outcomes**”, but that just scratches the surface in terms of understanding how activities, efforts and outcomes are captured in the software and what it can mean for your program and CUPS.

Activities at CUPS are tracked in many ways through ETO. From an initial meeting with a client through service and program delivery, follow-ups, event registration and graduation.

CUPS is committed to providing Integrated Care and the data we record on ETO propels us to deliver better services, derive better insights, report back to the community and ultimately to help our participants achieve their goals in becoming self-sufficient. ETO also allows CUPS to maintain the confidentiality and privacy of our participants by providing a secure, reliable and accessible platform.

Here is a list of some of the most common activities we track on ETO to be able to **use** the information, **record** our activities and **report** back to the community:

1. The programs that participants are accessing and referrals within the organization, referrals to our partners and other service providers in the community
2. Recording Service Notes (Case Notes, Encounters) to provide better service delivery for our participants
3. Recording important demographic, family information and Program assessments to better serve our participants while maintaining a Trauma-informed approach
4. Sharing information between programs to provide Integrated Care and move participants to Self-Sufficiency
5. Ensuring we seek and affirm consent with participants to protect their privacy

This is by no means and exhaustive list of all activities that we record on ETO. In the next few modules you will learn more about our core activities at CUPS and how to record them on ETO.

Login Best Practices on ETO

To login to ETO, open Internet Explorer and go to:

<https://secure.etosoftware.ca/login.aspx?ETO=cups>




ONLY USE INTERNET EXPLORER WHEN USING ETO

ETO is not compatible with other browsers
(Chrome, Mozilla, Safari, etc)

The Data Management team will assign you a reporting role on ETO and create an account and temporary password for you.

You will be given your login information after your initial ETO training.

Please follow these Best Practices to keep your account and our participants information safe:

1. Never leave your sessions open if you are not at your desk. ETO will time-out after 90 minutes of inactivity. If you leave your desk, please logout from ETO and lock your desktop computer
💡 TIP: use keyboard shortcut CTRL+ALT+DEL to lock your computer
2. Do not write your leave your password visible on post-it notes on your desktop/monitor
3. Do not share your user account/password with other staff to allow them to record information under your name
4. If you have forgotten your password you can email the Data Management Team to reset it or use the option of "Forgot my Password" from ETO login page.
5. Remember to notify the Data Management team if you believe there has been a security breach in your account.

Other CUPS Databases

As we mentioned in the previous section, ETO is our primary database but CUPS also uses other databases for funding requirements or provincial requirements.

HMIS

The Homeless Management Information System is used by our housing programs at CUPS. This database is managed by the Calgary Homeless Foundation.

ALL HMIS participants are also in ETO and are identified with their HMIS number.

Participant Name ▼	CaseNumber ▼	HMIS Client ID ▼	WOLF Chart Number ▼
➔ Fake, Faby	23691	010101	0000000001

WOLF

This database is an Electronic Medical Record system (EMR). It's managed by TELUS and administered by our Health team. Patients and participants with a unique WOLF ID are sometimes found in ETO if they have accessed other services. We identify these patients in ETO with a unique WOLF ID.

Participant Name ▼	CaseNumber ▼	HMIS Client ID ▼	WOLF Chart Number ▼
➔ Fake, Faby	23691	010101	0000000001

Trec / Dental

This database is used by our partner organization that provides dental services to our clients. This database is not managed by CUPS.

Raiser's Edge / Financial Edge

These databases are part of the Blackbaud systems and used by our Finance team and Fund Development team. No participants or client information is stored in these databases.

ADP

ADP is our main CUPS Payroll database managed by our HR department. No participant or client information is stored in this database

Module 02

Interface Navigation

In this module...

1. Programs & Services on ETO
2. Navigating between Programs
3. Searching Participants, Entities, Families, Groups, Collections
4. Site Search vs. Program Search
5. Dashboards on ETO

Programs & Services on ETO

ETO currently houses over 28 programs and services in the database.

Our programs mirror the process that a participant will follow during their initial intake/registration to CUPS and subsequent engagement to other programs and services*

Each program on ETO has a set of participants with information about their program history, records of their assessments and referrals associated with them.

Data within each program has its own unique **security and sharing structure**. Some programs have tighter rules for sharing and viewing due to the sensitive information contained in them.

**Some Health Programs are not yet part of ETO*



During your training you will learn more about how each program is structured and what information you can view/edit based on your access level.

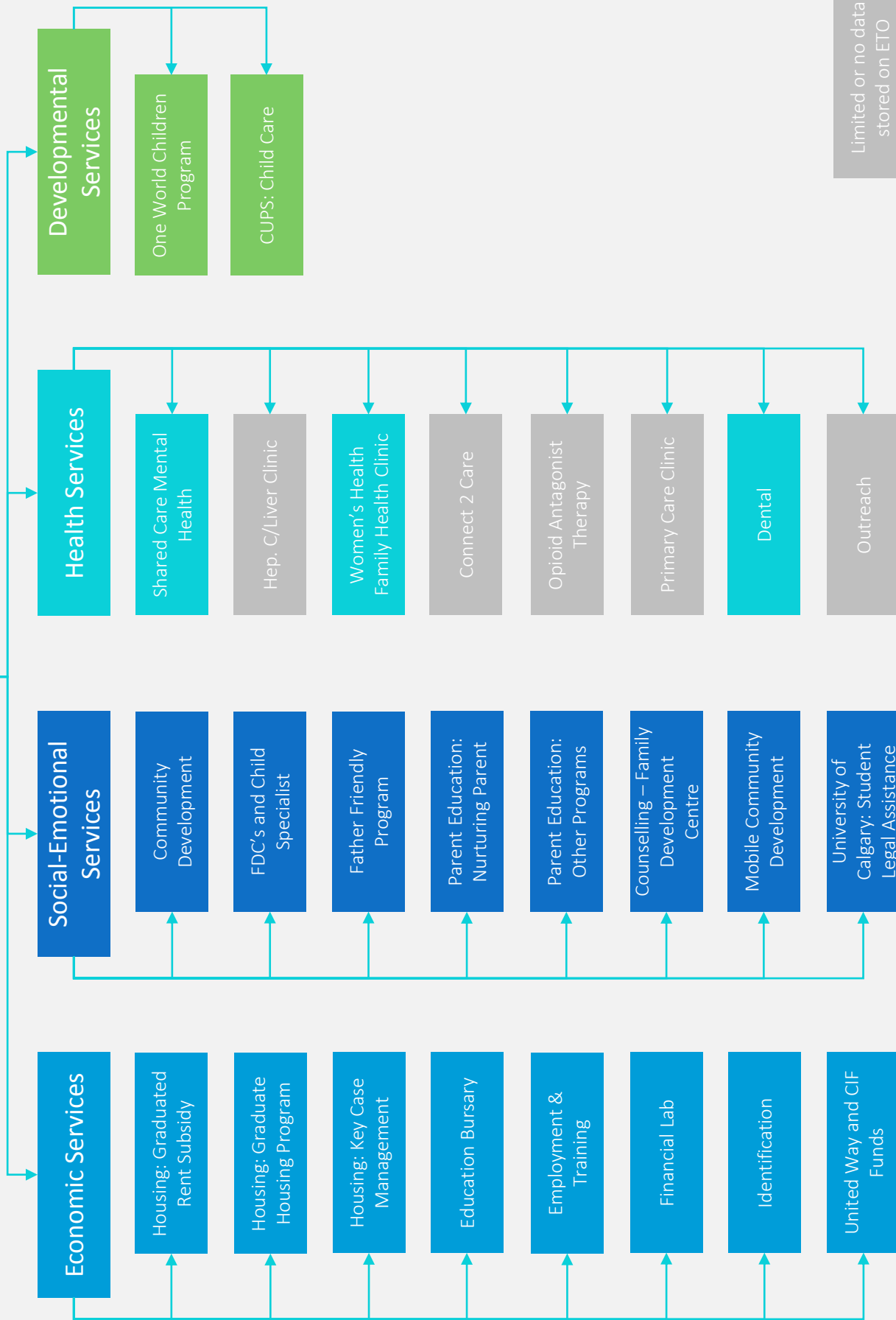


If you have questions about your access to information, you can talk to your manager/supervisor to request access to other programs and services.

The Data Management team will update user access within 24 hours.

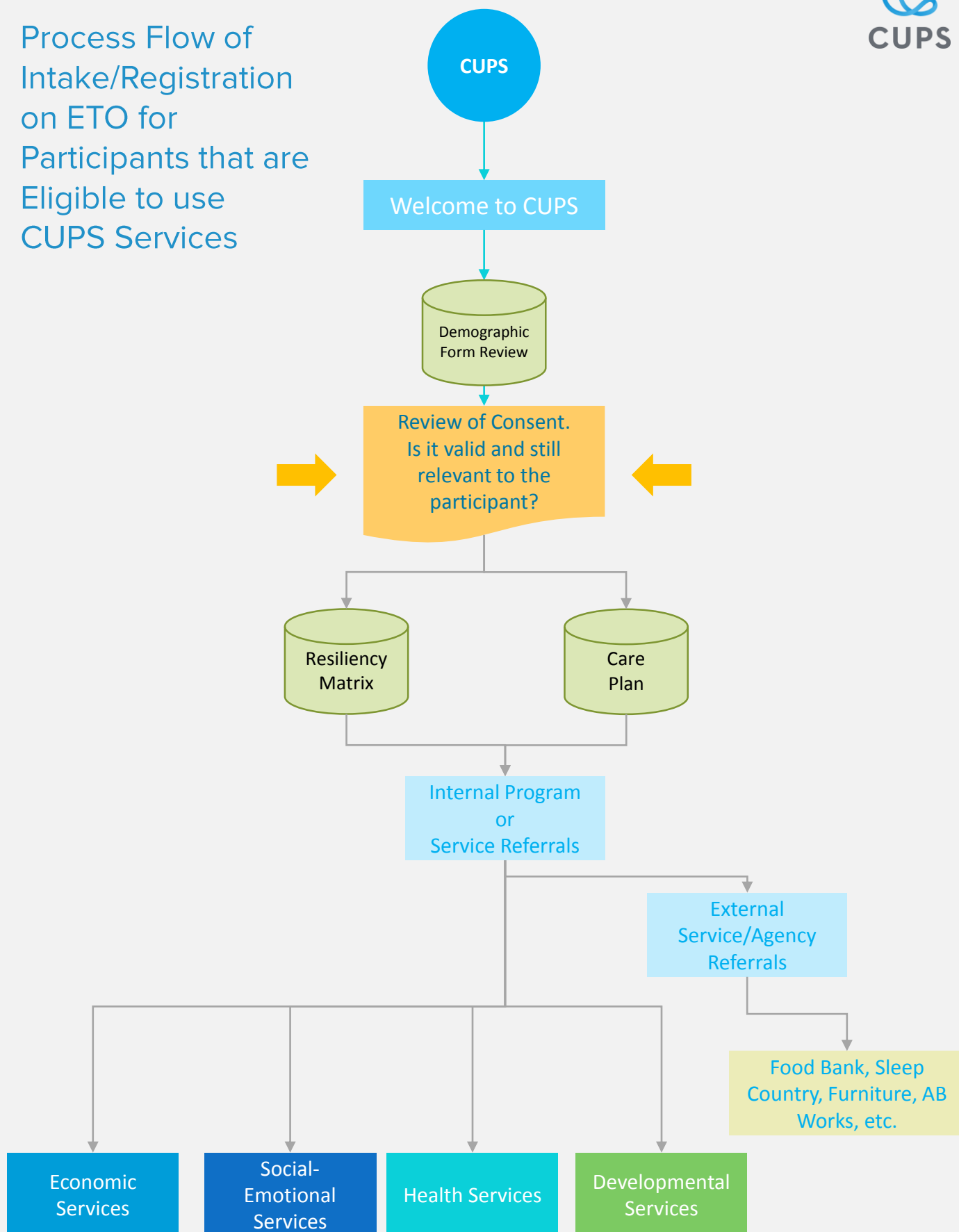
The next pages show how information flows within ETO for participants accessing different programs & services. Keep this in mind for mapping your way around ETO.

Welcome to CUPS



Limited or no data stored on ETO

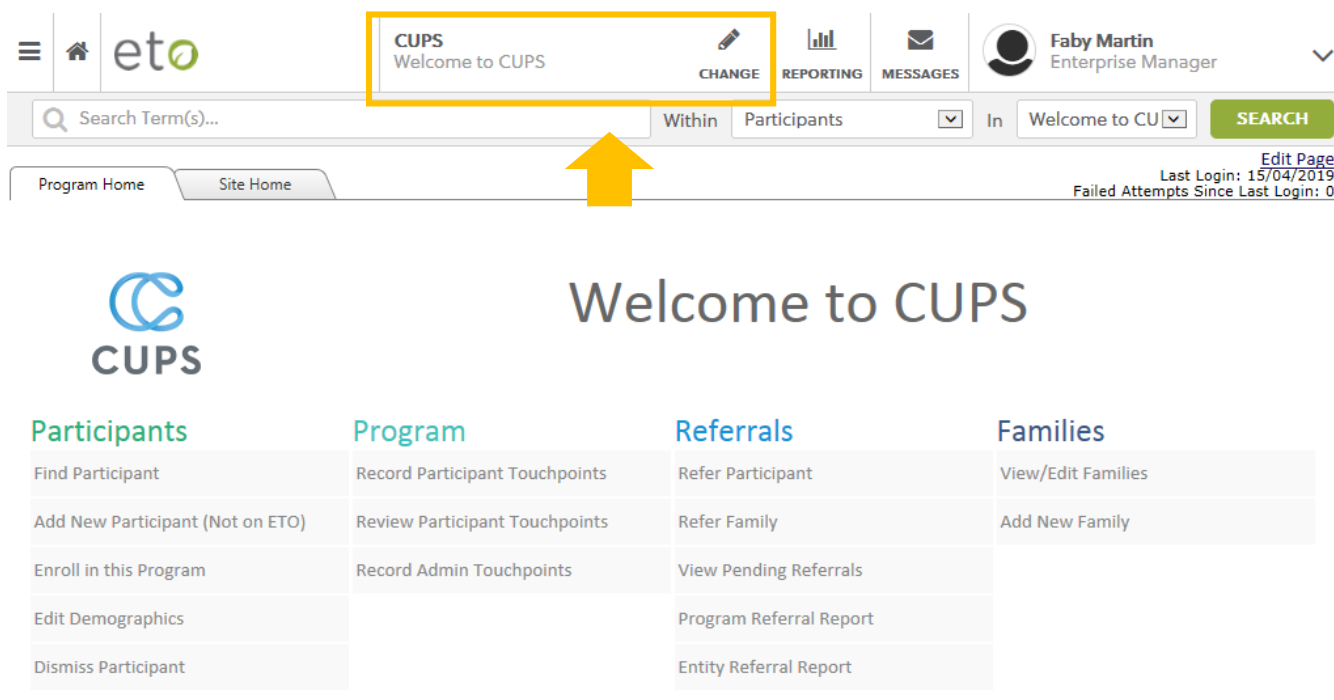
Process Flow of Intake/Registration on ETO for Participants that are Eligible to use CUPS Services



Navigating between Programs on ETO

Your first page will be the main program you will be entering information in. If you have access to multiple programs, you can request to change which program you see first.

To change programs, click on the link on the top middle of your screen where the name of the program is. A drop-down menu will appear where you can select the program



The screenshot shows the ETO interface. At the top, there is a navigation bar with the ETO logo, a search bar, and a dropdown menu for selecting a program. The 'CUPS' program is currently selected, and the dropdown menu is highlighted with a yellow box. A yellow arrow points to the 'CUPS' link in the dropdown menu. Below the navigation bar, there is a search bar and a table of links. The table has four columns: Participants, Program, Referrals, and Families. The 'Program' column is highlighted with a yellow background.

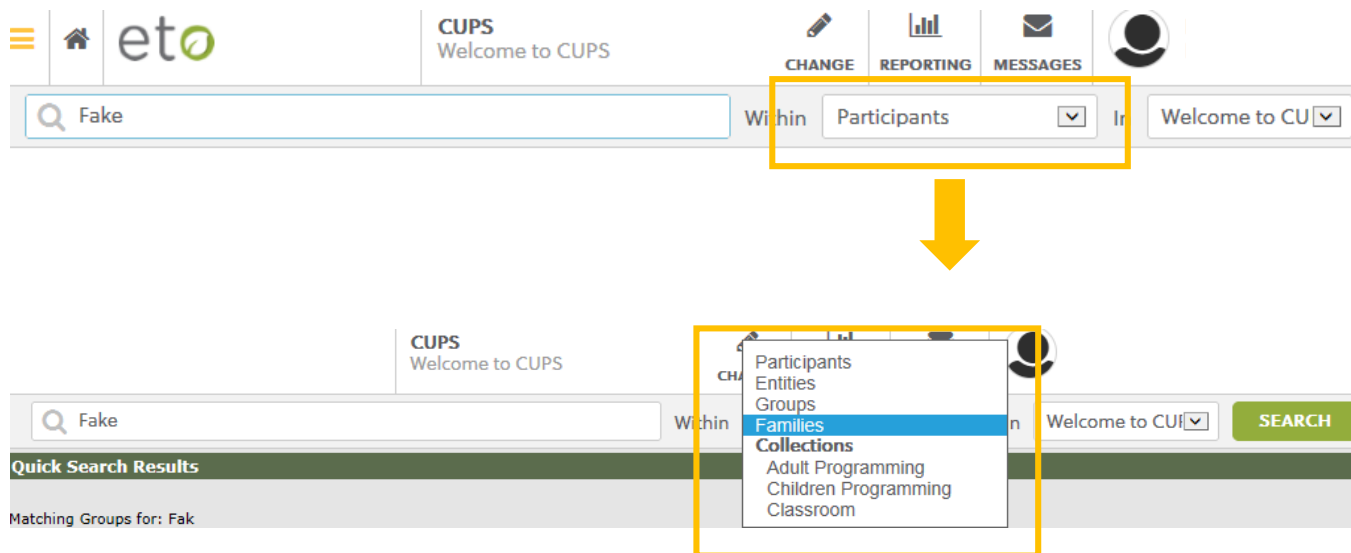
Participants	Program	Referrals	Families
Find Participant	Record Participant Touchpoints	Refer Participant	View/Edit Families
Add New Participant (Not on ETO)	Review Participant Touchpoints	Refer Family	Add New Family
Enroll in this Program	Record Admin Touchpoints	View Pending Referrals	
Edit Demographics		Program Referral Report	
Dismiss Participant		Entity Referral Report	

Use this option to switch between different programs on ETO. Your access will be determined by your position, team and work.

Search Bar Navigation

Navigate to the program where you are recording/viewing data

Use the bar on the top to search for participants, families, groups, entities and collections (if applicable)



Search within the Program or within the whole CUPS database.

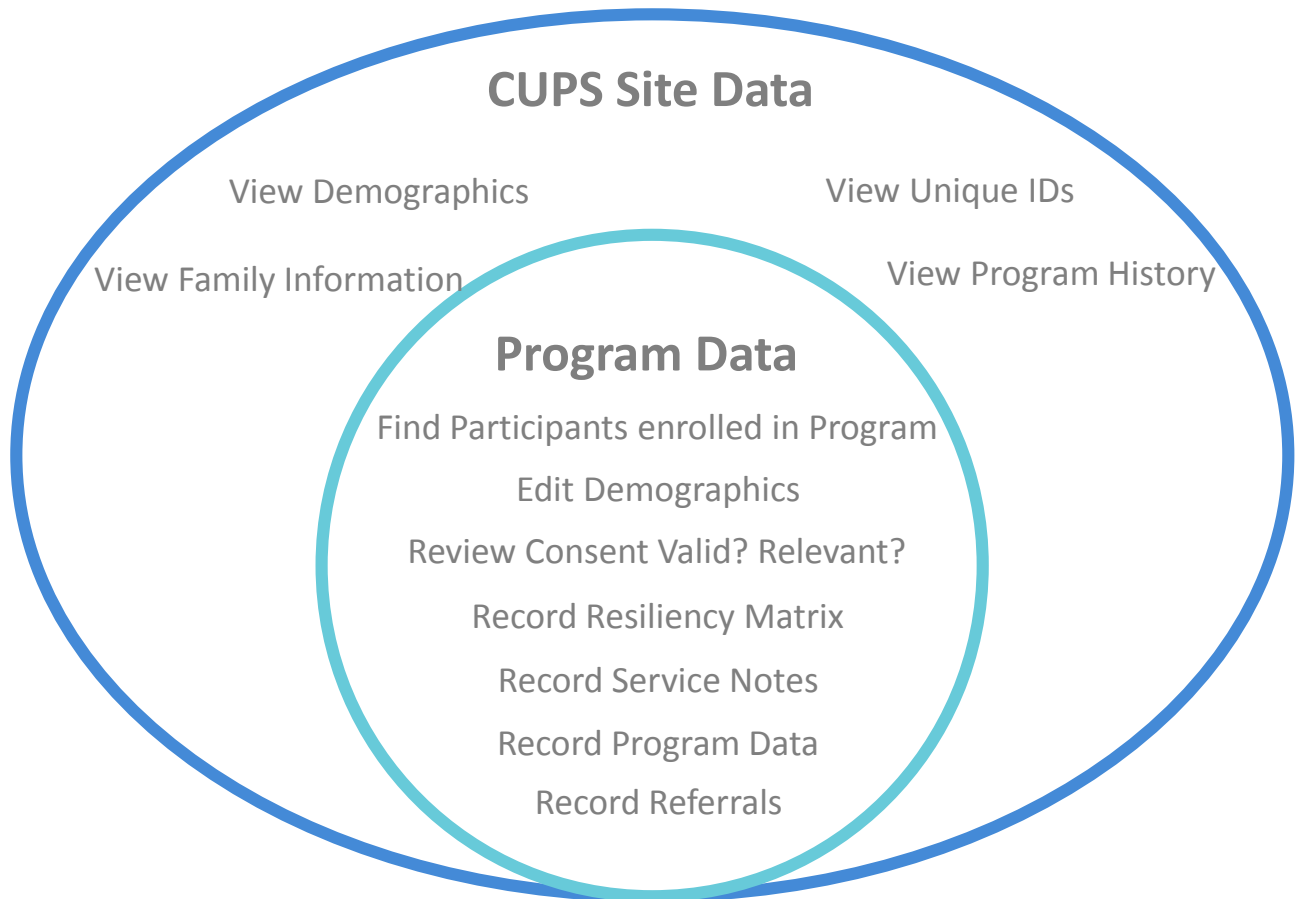


Searching in the Program will only list participants who are currently active in that program. Searching on the CUPS site will list all participants who are currently active in ALL programs across CUPS.

Site Search vs. Program Search

In ETO you can search for someone in the Program you are currently viewing or in the whole CUPS Database

To understand this concept, the illustration below shows how Data on ETO can be searched



Remember...

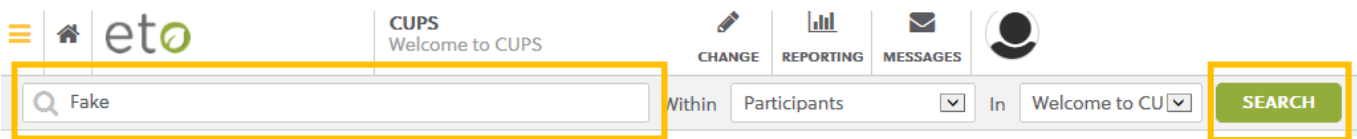


- When adding a **new** participant, always search first under CUPS Site to make sure they haven't already accessed CUPS.
- Searching for a participant in the **Program** will only list participants who are currently active in that particular program.
- Searching on the CUPS site will list **ALL** participants who are currently active in ALL programs across CUPS.

Dashboards on ETO

Each Program on ETO has a Dashboard where you are able to see a Participant's information at a glance. They are one of the most useful tools in ETO for program and service delivery!

Step 1: Find a participant in your program and click Search



Step 2: Click on the name and then click on Participant Dashboard

Filtered by		
FName LName		
Participant Name	CaseNumber	HMIS Client ID
Fake, Faby	23691	010101

100 items per page

FName LName		
Participant Name	CaseNumber	HMIS Client ID
<div> Fake, Faby <ul style="list-style-type: none"> Faby Fake's Dashboard View / Edit View / Record TouchPoint Program History Dismiss from program MORE CLOSE </div>	23691	010101

items per page

Participant Dashboard

The participant dashboard will change depending on the program you are currently viewing.

Most dashboards in ETO follow a standard structure we've designed to show you the most relevant information for a participant.

You will see a history of activity for the participant, including their **Resiliency Assessment**, their **Demographics**, **Family composition** (if applicable), latest **Referrals**, **Program History**, **Service Notes** and many other touchpoints.

We recommend spending some time familiarizing yourself with each of the sections in a participant's dashboard

Take Action	Date Completed	Recorded By	Select assessment interval	Housing & Living Conditions	Economic: Income & Finances	Literacy, Education, Job Skills & Training	Food Access & Nutrition	Emotional: Meaningful Activities	Natural Supports & Family Relations	Regulation: Working Memory & Cognitive Flexibility	Emotional: Legal & Justice	Health: Physical Health	Health: Mental Health	Addictions & Substance Use	Health: Access to Healthcare	Early Years Development (0-6 years)	Faxes Sent
	26/10/2017	Faby Martin	Follow-up (post)	Declined to answer	Stable	Self-Sufficient	Stable	Self-Sufficient	Thriving	Self-Sufficient	Stable	Vulnerable	In-Crisis	In-Crisis	In-Crisis	In-crisis	
	17/10/2017	Faby Martin		Stable	Vulnerable	Stable	In-Crisis	Self-Sufficient	Self-Sufficient	Stable	Self-Sufficient	In-Crisis	In-Crisis	Self-Sufficient	Stable		
	25/4/2017	Faby Martin	Initial Assessment (pre)	In-Crisis	Vulnerable	Stable	Self-Sufficient	Thriving	Self-Sufficient	Stable	Vulnerable	In-Crisis	Vulnerable	Thriving	Self-Sufficient	Self-Sufficient	Initial Assessment Faxed

[+ New](#)

1. Participant Information

1. Participant Information

CaseNumber: 23691
 FirstName: Faby
 LastName: Fake
 Address1: test
 ZipCode:
 HomePhone: (403) 123-4567
 WorkPhone:
 CellPhone:
 Email: fabyfake@email.com
 DOB: 01/03/1989
 Age: 29 years
 Gender: Female
 Alert:
 WOLF Chart Number: 0000000001
[View/Edit Participant](#)

Family Information

Faby Fake's Family

Developmental Fake Family

Faby Fake Self (head of household) Head of Household
 Ice Fake Child
 Family Program History
 Family Composition History

Caseworkers

Faby Fake's Caseworkers

Edit

No records to display.

Programs

Programs

Program Name	Start Date	End Date	Reason for Dismissal
Housing: GHP	09/01/2019	Pending	
Dental Program	30/07/2018	Pending	
Economic Programs	11/04/2018	Pending	
Housing: GRSP	07/03/2018	Pending	
Welcome to CUPS	22/02/2018	Pending	
Mobile Community Development	17/01/2018	12/06/2018	Loss of Contact
Developmental Intake	23/11/2017	17/08/2018	Program Completed
Developmental Intake	21/11/2017	22/11/2017	Information Referral Completed
Health: Primary Care (Information Referral)	25/10/2017	30/10/2018	Program Completed
Mobile Community Development	25/09/2017	26/10/2017	Client Ineligible or Not a Good Fit for Program

Page: 1 2 3 [Review All \(23\)](#)

Recent Referrals

Faby Fake's Recent Referrals

Take Action	Referred By	Reason for Referral	Referral Type	Entity/Program/Site	Referral Status	Referral Date	Referral End Date
	Faby Martin	Economic: Housing & Living Conditions	Program	CUPS: Child Care	Supported Referral	10/04/2018	
	Faby Martin	Economic: Housing & Living Conditions	Program	Economic Programs	Supported Referral	10/04/2018	11/04/2018
	Chris Sabiston	Economic: Income & Finances	Program	Housing: GRSP	Supported Referral	07/03/2018	07/03/2018
	Faby Martin	Developmental: Early Years Development (0-6 yrs)	Program	Developmental Intake	Information Referral	23/11/2017	23/11/2017
	Faby Martin	Continuing Education	Program	Good Food and Nutrition	Information Referral	03/10/2016	03/10/2016
	Stella Sylva	Health: Mental Health	Program	IntakeCrisis Intervention Family	Supported Referral	06/05/2016	

[+ New](#)

[View All](#)

Module 03

Demographics

In this module...

1. Demographics: Tombstone Data & Supplementary Data
2. Demographics Page on ETO
3. Best Practices for entering Demographic Data
4. Updating Addresses
5. Children & Families Information

Tombstone Vs. Supplementary Data

ETO Demographic data is categorized in two types of data: Tombstone Data and Supplementary Data

Tombstone Data

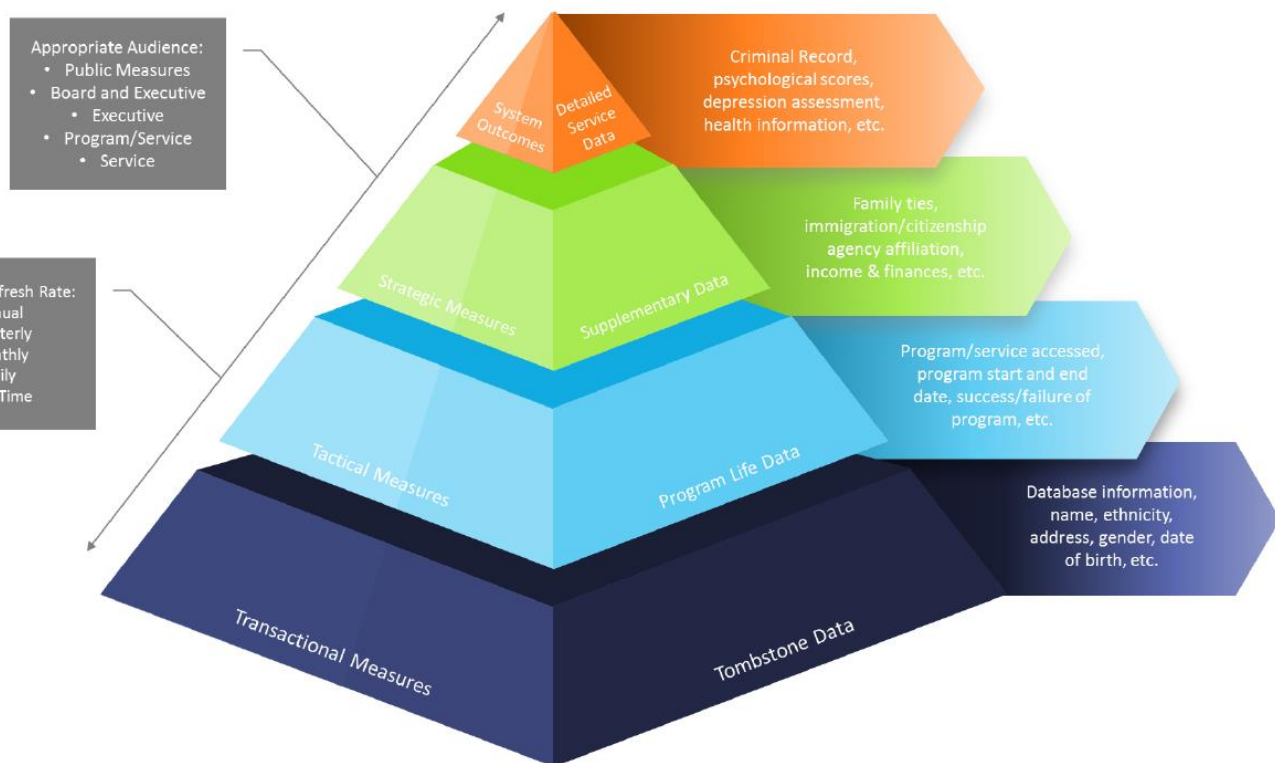
Information that does not generally change throughout a person's life:

Examples: Name, DOB, Gender, Ethnicity, Address

Supplementary Data

Information that changes throughout a person's life:

Examples: Family Information, Marital Status, Immigration & Citizenship, Income & Finances, etc



Demographics on ETO

Each program on ETO has access to the same Demographic information for all participants in the system.

Demographics are usually created or updated in two scenarios:

1. A New participant will be added to ETO for the first time
2. An existing participant needs information updated in their demographics page



Remember that prior to adding a new participant, you must always check to see if they have already been added to the system to avoid creating duplicates.

To start, you can go to your Program's Home Page and choose the following actions: **Find a Participant**, **Add a New Participant** or **Edit Demographics**

Participants

Find Participant

Add New Participant (Not on ETO)

Enroll in this Program

Edit Demographics

Dismiss Participant

Option 1: Find an existing participant that has been to CUPS previously or is currently active in a Program

Participants

Find Participant

Add New Participant (Not on ETO)

Enroll in this Program

Edit Demographics

Dismiss Participant

Option 2: Add a New participant to the system after confirming they have not been added previously to ETO

Participants

Find Participant

Add New Participant (Not on ETO)

Enroll in this Program

Edit Demographics

Dismiss Participant

Option 3: Edit a participant's demographic information (Address, Family Status, Marital Status, etc)

Best Practices for Demographic Data

When entering a new participant, **all information must** be entered if the participant consents to collecting information

Database Information

Case Number

WOLF Chart Number

HMIS Client ID ?

Unique Number automatically generated by ETO

Unique Numbers generated by other databases. These are entered manually

Basics

First Name *

S9 - Middle Name

Last Name *

Gender ?

Do you identify your gender as: ?

DOB



Basic Tombstone Information for a Participant

Contact Information

Address 1

Address 2

Postal Code ?

Home Phone ?

Work Phone ?

Ext:

Cell Phone ?

Email

A participant can only have **one active** Address at a time. Update this field if there has been a change of address

Contact Information regularly reviewed and updated accordingly.

Best Practices for Demographic Data

Ethnicity

S1 - Ethnicity ?

S2 - If other ethnicity, please specify ?

Ethnicity updated only once

All **Supplementary Data** must be reviewed regularly and entered if the participant consents to collecting their information

Immigration and Citizenship

S4 - Citizenship and Immigration Status ?

S5 - If "Other" status, please specify:

Immigration and citizenship is updated if there has been a change

Family and Dependants

H2 - Family Information ?

F6 - Marital Status ?

F8 - Number of adults in household - 18 or older

F9 - Number of children in household - under 18

F10 - Name of Child 1

F11 - DOB of Child 1

Supplementary information reviewed regularly and updated
There are currently 8 fields for children and their DOBs

Additional Information

If no referral source- how did you hear about us? ?

Have you served in the armed forces? ?

FD1 - Referral Source ?

Additional Information updated only once

Updating Participant's Addresses


A participant on ETO can only have one active address at a time.
To update an Address, click on “Edit Participant Address history”

Contact Information

Address 1








[Edit Participant Address History](#)

Address 2

Postal Code 





Review address history and add an End Date to old address, then click on **+New** to add a new address. It's important to keep the history of addresses for future reference.

Addresses					
Take Action		Date From	Date To	Value From	Status
	1.	26/10/2017	01/02/2018	test ,	Old
	2.	04/05/2017	26/10/2017	54654654 ,	Old
	3.	23/12/2016	04/05/2017	test , Calgary, AB t2y 4k4	Old
	4.	02/04/2016	22/12/2016	Test address , Calgary, AB t2y 4k4	Old
	5.	24/03/2016	01/04/2016	221B Baker St , Calgary, AB T2Y 4K4	Old
<div>  Cancel  New </div>					



When adding a NEW current address, leave the Date To: blank to signal it's active.

Address Information	
* Date From:	<input type="text"/> 
Date To:	<input type="text"/> 
Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
Postal Code:	<input type="text"/>



Leave Blank for active address

Click **Save** and return to the participant demographic page

Children and Family Members

If a participant has children and family members, please use the following fields in the demographic page:

Children and youth in the family 0 - 17 years-old

F10 - Name of Child 1

F11 - DOB of Child 1

F12 - Name of Child 2

F13 - DOB of Child 2

F14 - Name of Child 3

F15 - DOB of Child 3

F16 - Name of Child 4

F17 - DOB of Child 4

You will have space for 8 Children’s names and their DOBs

If DOB is unknown, please ask for the approximate DOB

Family Members in Demographics

If a participant is accessing CUPS with their spouse, common-law or family member, please use the following fields to link members into a household

Add Family Members

Add Family Member

Note: Family Members added in this section of the screen are not checked for duplicates.

If you wish to check all Family Members for duplicates, use the Add Family feature in the software.

Family Member #1

First Name *

DOB

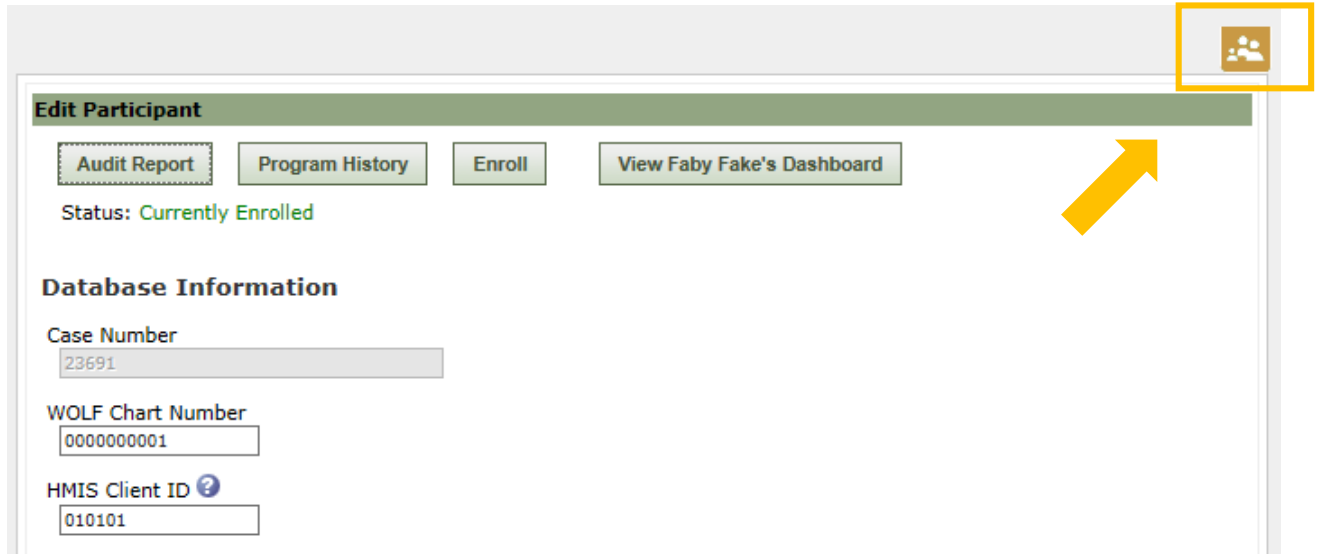
Last Name *

Gender ?

--Select--

Children and Family Members

To edit an existing Family, go to a participant's demographic page and click on the family button on the top right



Edit Participant


[Audit Report](#) [Program History](#) [Enroll](#) [View Faby Fake's Dashboard](#)

Status: **Currently Enrolled**

Database Information

Case Number
23691

WOLF Chart Number
0000000001

HMIS Client ID 
010101

Clicking on the icon will open a drop-down menu:

- Add New Family Member
- Edit Family Name



Developmental Fake Family

- Work With Family
- Add New Participant to Family
- Edit Family Name**
- Make Family Referral
- Family Members ▶

Editing Name will take you to a Family Page where you can update information for the family

View/Edit Family: Developmental Fake Family

Developmental Fake Family

[Edit Family Name](#) [Delete Family](#) [Disable Family](#) [View Program History](#) [View Composition History](#)

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Faby Fake	30	01/03/1989	Self (head of household) ▼	Head of Family Delete
2	Ice Fake	1	03/05/2017	Child ▼	Select as Head Delete

Add New Members to Family: Developmental Fake Family [Search for Others...](#) | [Add New Family Member](#)