ETO Dashboard and Touchpoint Tutorial

Questions regarding ETO?

Please contact the ETO helpdesk at

eto.helpdesk@employmilwaukee.org .

Revised: 05/01/2025

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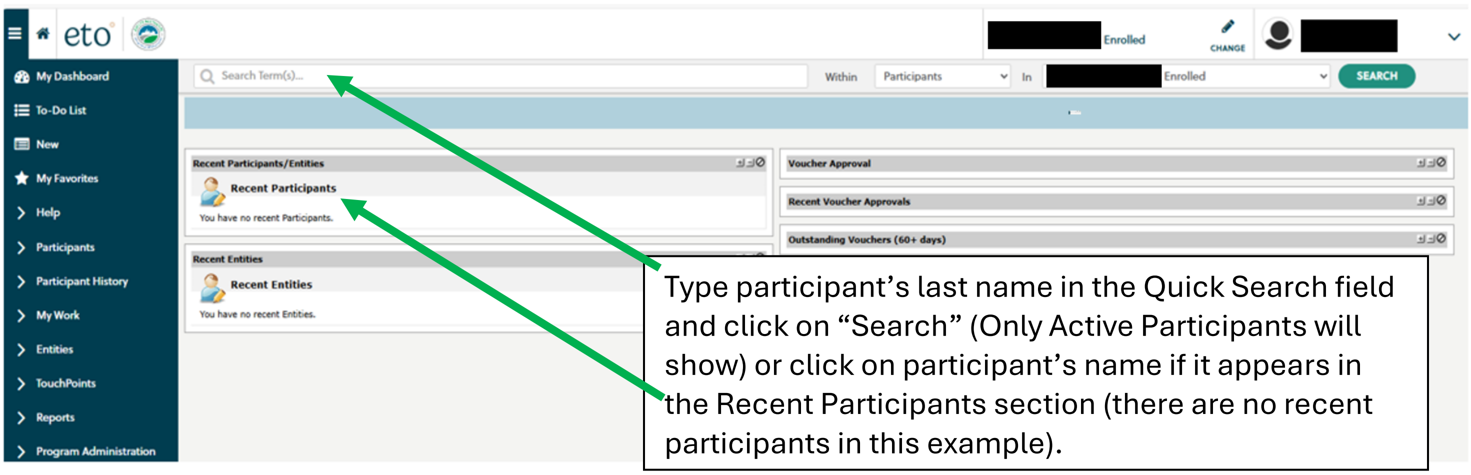
Special Note: Items in ETO denoted with a red asterisk * is a required data point.

1. Navigating the User Dashboard

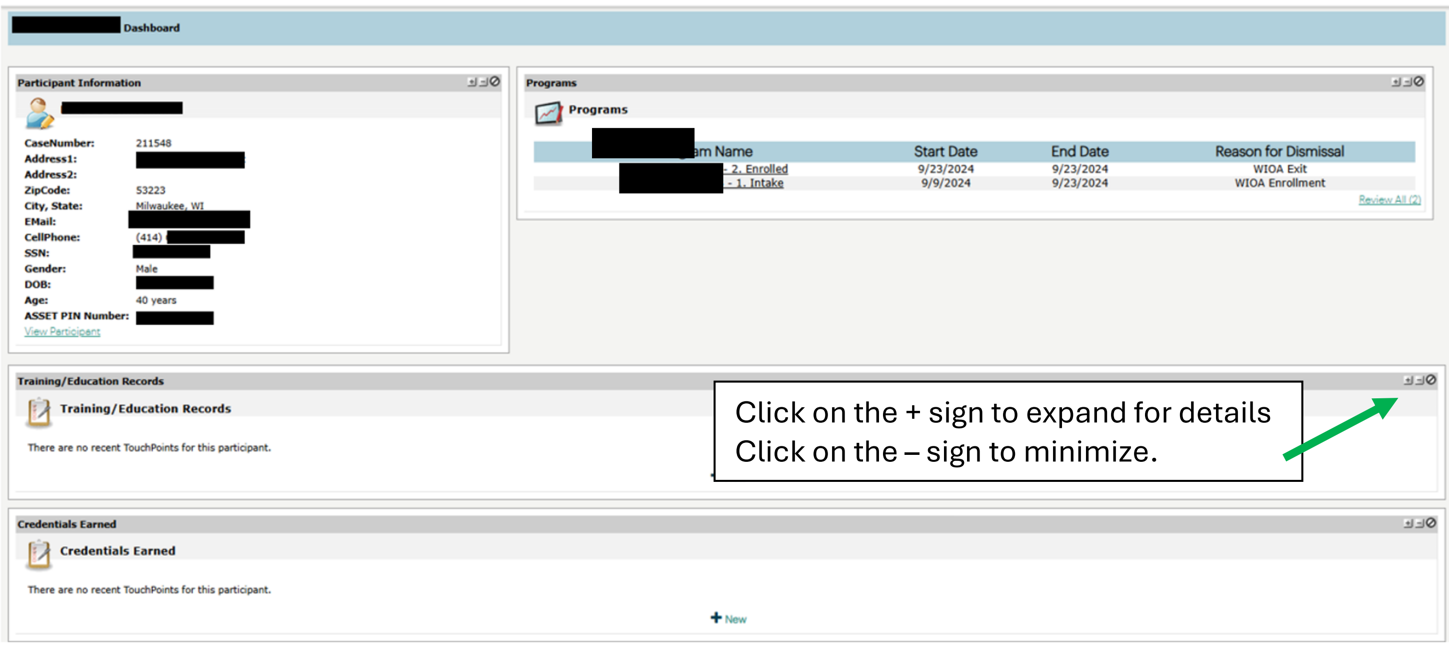
The **user dashboard** will be the first thing you see when logging into a specific program. The user dashboard will include participants you have worked with in the system, recent data you have entered and recent participants you have worked with.



Type participant's last name in the Quick Search field and click on "Search" (Only Active Participants will show) or click on participant's name if it appears in the Recent Participants section (there are no recent participants in this example).

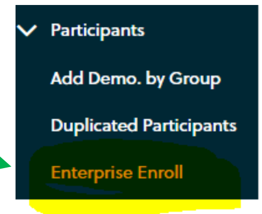
2. Navigating the Participant Dashboard

The **participant dashboard** will provide information that has been recorded in ETO that is specific to the participant. The participant dashboard will include participant information, the programs that the participant has been enrolled in (only site specific) and details of services that have been provided for the participant.

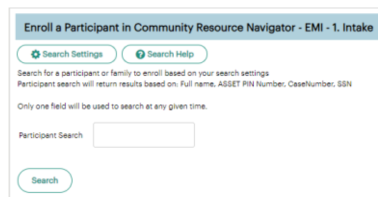


3. Adding an Enrollment to an Existing Participant

Enterprise Enroll allows users to enroll an existing participant from any site in ETO to avoid duplicating participant records.



- From the User Dashboard Search use the left menu bar, select Enterprise Enroll.
- Type the participant data point
- Click Search

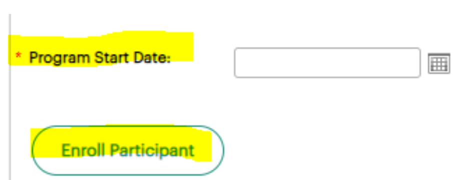


- Scroll through the results. Click on the correct participant's name.


Below are all participants who are not currently enrolled in Community Resour

	NAME	CASE NUMBEI
☐	Daywanda Fake Bush Fake	195614
☐	CaseNumber Fake	140707
☐	CaseNumberrrrrr Fake	140722
☐	CaseNumberY Fake	140719
☐	CaseNumberZ Fake	140715
☐	DupeCheck Fake	140727
☐	Duplicate Fake	140724
☑	Tyler Fake	161020

- Select the participant name, review the demographic information (Ex. DOB, SSN) displayed to confirm you have the correct participant identified.



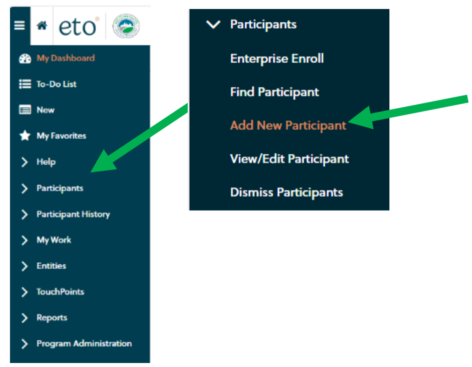
- If this is not the correct participant, go back to the list and continue to review each person until you find the participant you are looking for. Once you confirm you have found the correct record, enter the Program Start Date and select Enroll Participant
- Go to View/Edit participant to update the demographics.

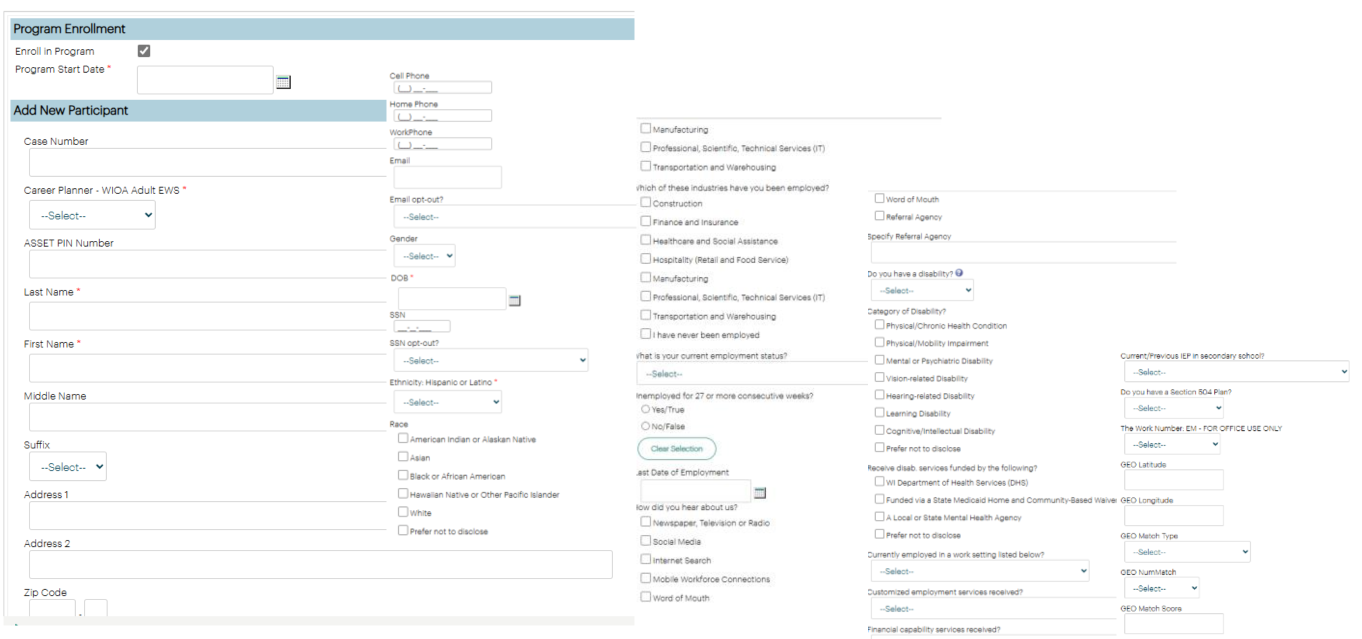
  Please Note: ETO stores the most recent demographics when enterprise enrolling. It is very important to update the demographics using View/Edit Participant when using this feature.

4. Adding a Participant That was Not Found in ETO

Once you have confirmed that the participant is **not** already entered into the database via **ENTERPRISE ENROLL** – NOT a quick search, you may add a new participant. Using left hand side navigation bar

- Expand "Participants".
- Then click on "Add New Participant" and a new window will appear.
- Scroll through the window, enter all the pertinent information.
    - Never uncheck "Enroll in Program"





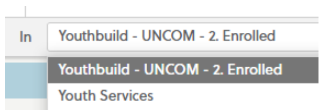
5. Quick Search for a Participant to View/Edit

Quick Search is available at the top of your ETO screen and functions as a quick way for users to search for participants within the current program and site.

Using the menu bar at the top of the screen,

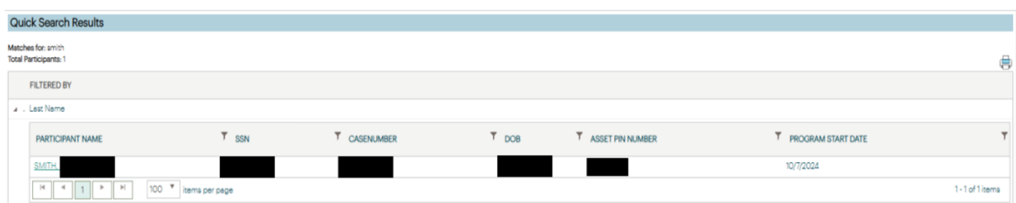
- Type the participant's last name only using one data point (e.g.: last name <OR> case number, etc.) at a time.

- Select Program or Site

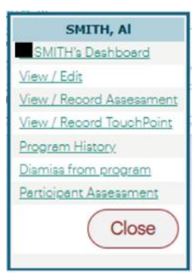


- Click Search 

- Review the list of participants, click on the matching participant name.



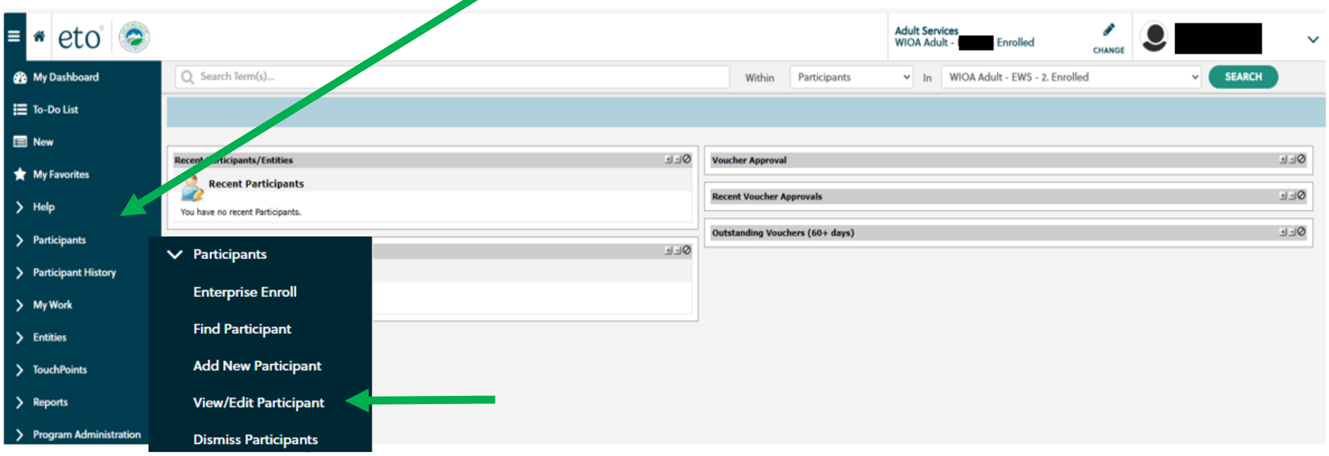
- Select the most appropriate choice.



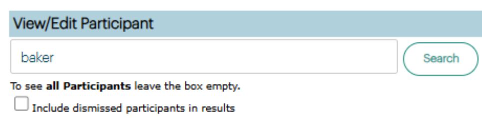
6. Alternate Search for a Participant Record to View/Edit

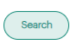
There are several ways to view or update demographic information for a participant. You can complete a Quick Search to find the participant and select View/Edit or from the User Dashboard

- On left hand side menu bar, click Participants to expand.
- Click on View/Edit Participant.

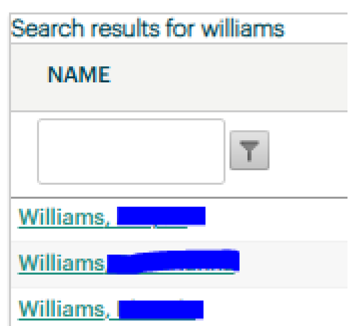


- In the field indicated, enter the data point you want to search by.

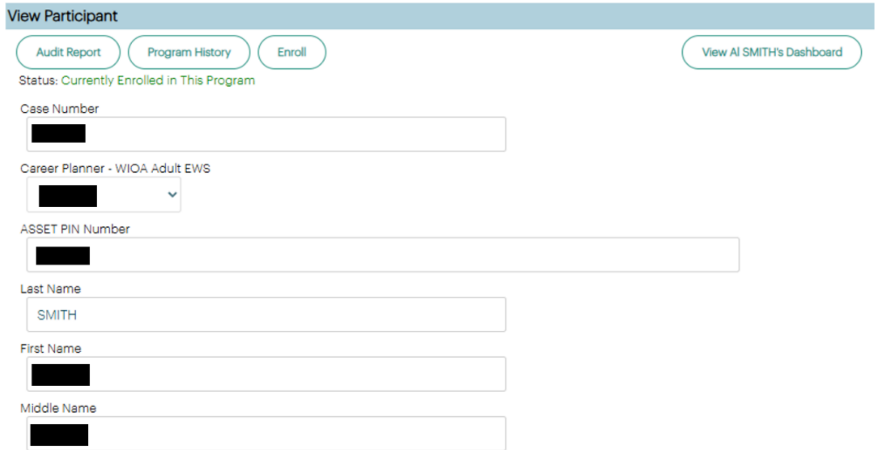


- Click 

- Scroll through the list to find your participant.
- Click on their the correct name to view the participant.



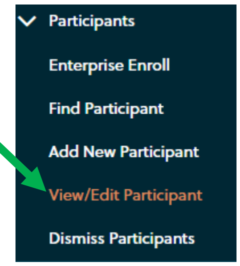
Participant view



7. Moving a Participant from One Program to Another

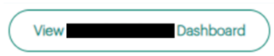
To move Participant from one program to another (Example: Intake to Enrolled Program)

- From the Participant’s Dashboard, click on View/Edit Participant found in the left hand side menu bar.

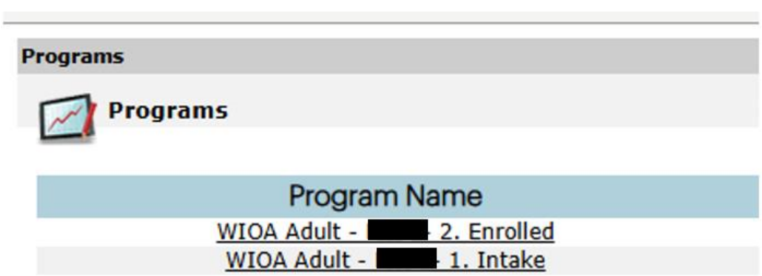


  - A new window will appear
  - From View/Edit Participant screen, click on Enroll at the top.

  - Check the box ☐ next to the Program Name where you want to add participant.
  - Program Start Date will default to today's date. To change this date, click onthe date field to edit.
  - Click on Save and you will be returned to View/Edit Participant.
  - Click on Dashboard link at top of page.



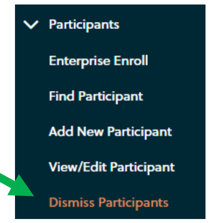
- The Participant dashboard will now show both programs they are enrolled in.



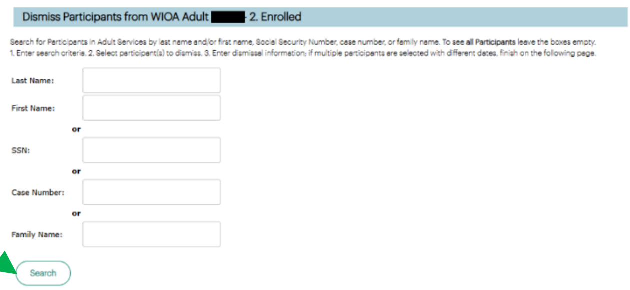
8. To Dismiss a Participant from a Program

When intake is complete or when a participant is done with a program they were enrolled in, you will need to dismiss the participant from the intake or other program.

- Using left hand side navigation bar, click on Dismiss Participants.

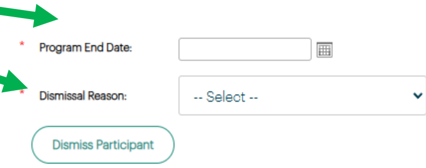


  - A new window will appear.
  - Enter identifying participant information
  - Click "Search"



  - A list of participants' names will appear.

  - Check the box ☐ next to participant name that you want to dismiss from the program.
  - Scroll below the list of names and enter the program end date.
  - Use the drop down to select the appropriate dismissal reason.

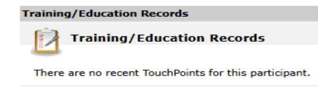


  - Click Dismiss Participant

9. Recording Training/Education Records

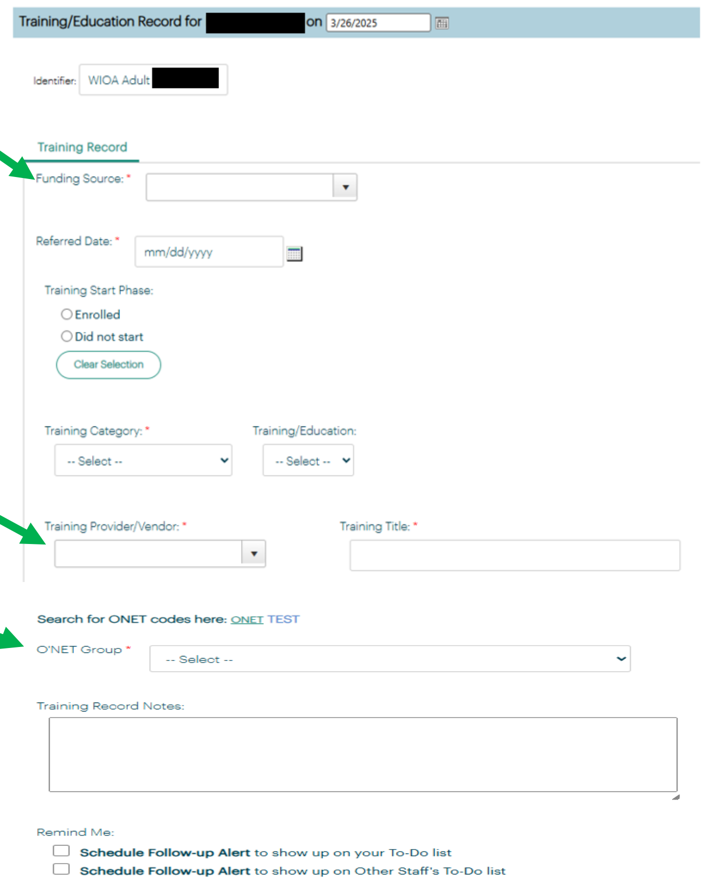
Training/Education Records are recorded to track the program a participant is being referred to, enrolled in, completed, or did not start/complete.

Please note: A 'Training/Education Record' is recorded once for all phases of a specific training/education service. The only time you would record multiple training/education records is if a participant was in multiple services.



- From the Participant Dashboard, Select "+ New" button in the Training/ Education Records Dashboard touchpoint.

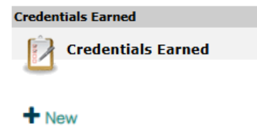
- Complete fields within the Training Record shown below.



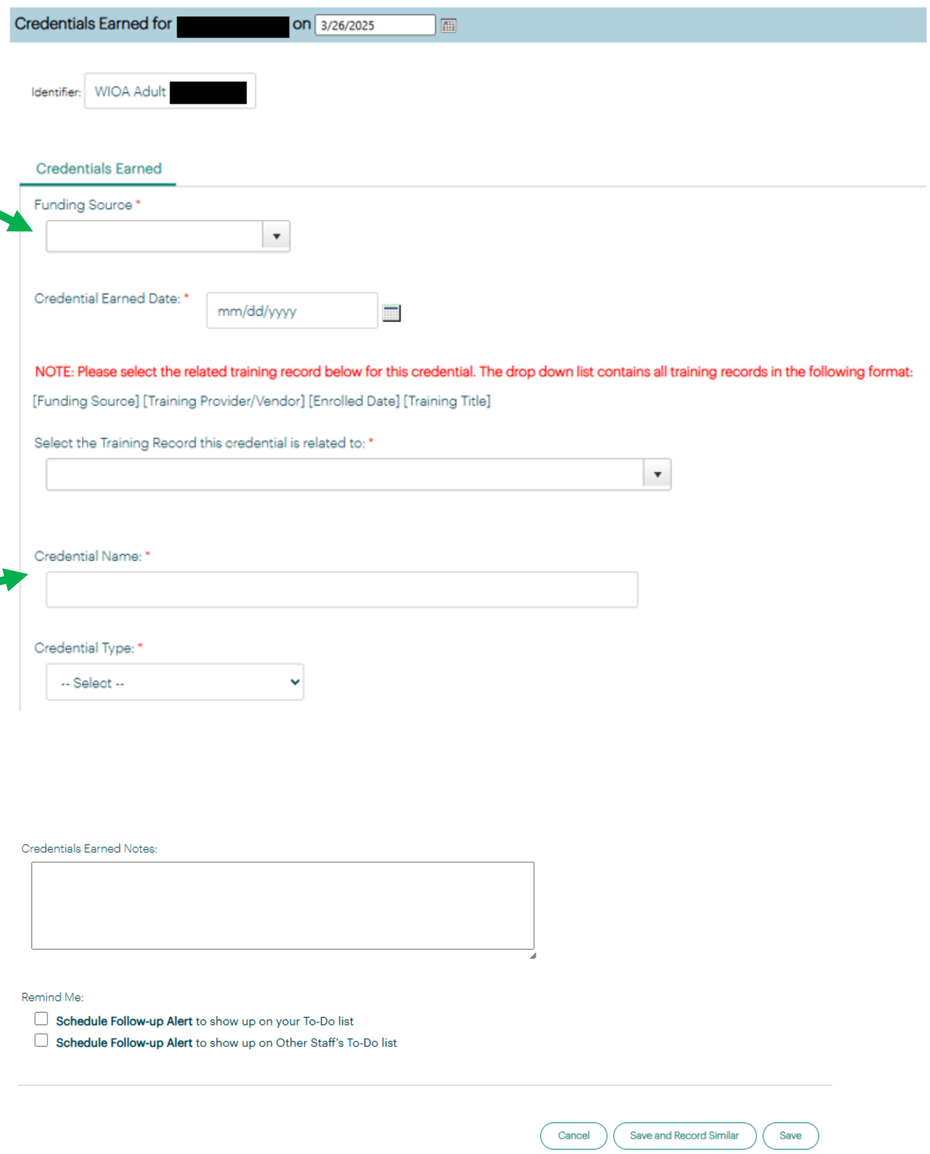
- Use the drop down to select appropriate funding source or begin typing the funding source in the field which will narrow search based on what was typed.
- Record training/education details based on when the activity occurs. Every time a new phase of the training occurs, edit the same 'Training/Education Record' touchpoint.
- When recording the 'Training Provider/Vendor' field, start typing vendor name in box instead of using drop down arrow.
- Select appropriate 'ONET Group'. 'ONET Group' is based off the first two digits of the 'ONET Code'. Once 'ONET Group' is selected, another field populates where you select the ONET title. ONET title should be the same as the 'ONET Code'.
- "Save" once complete. 

10. Recording Credentials Earned

Credentials Earned are recorded to track a credential that a participant obtains through a training or educational activity.



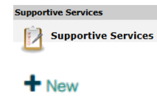
- From the Participant Dashboard, Select "+ New" button in the touchpoint.
- Complete fields within Credentials Earned shown below.



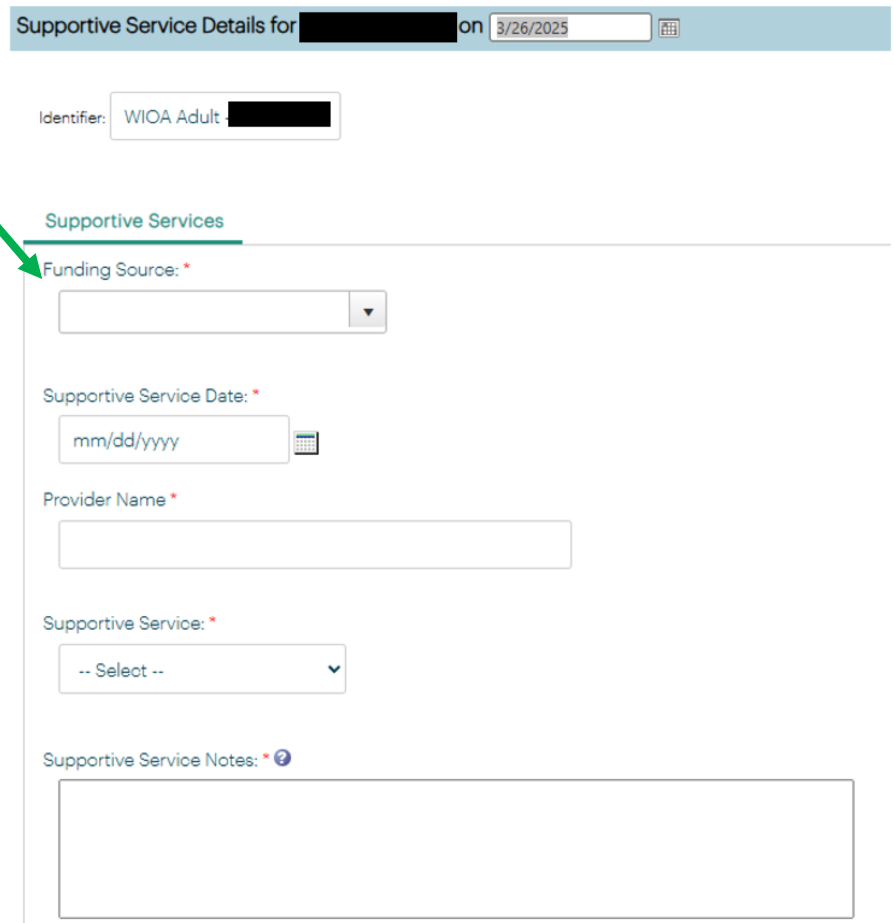
- Use the drop down to select appropriate funding source or begin typing the funding source in the field which will narrow search based on what was typed.
- Record credential earned details based on the credential being documented. **Remember:** Record credentials only after the required documentation has been obtained.
- Use the drop down to select the training record the credential is related to. Note the unique format of information.
- "Save" once complete. Save

11. Recording Supportive Services Details

Supportive Service Details are recorded to track any supportive services a participant obtains. This includes Childcare Assistance, Clothing or Work Apparel, Counseling, Housing Assistance, Legal, License Fees, Other Supports, Transportation Assistance, or Work Tools & Equipment.



- From the Participant Dashboard, Select "+ New" button in the touchpoint.
- Complete fields within Supportive Services Details shown below.
- Use the drop down to select appropriate funding source or begin typing the funding source in field which will narrow search based on what was typed.
- Enter the date that the supportive service was provided.
- Record remaining supportive service details.
- Supportive Service Notes are required and should contain details of the supportive service provided.
- "Save" once complete. 

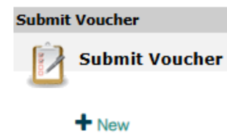


12. Recording Vouchers

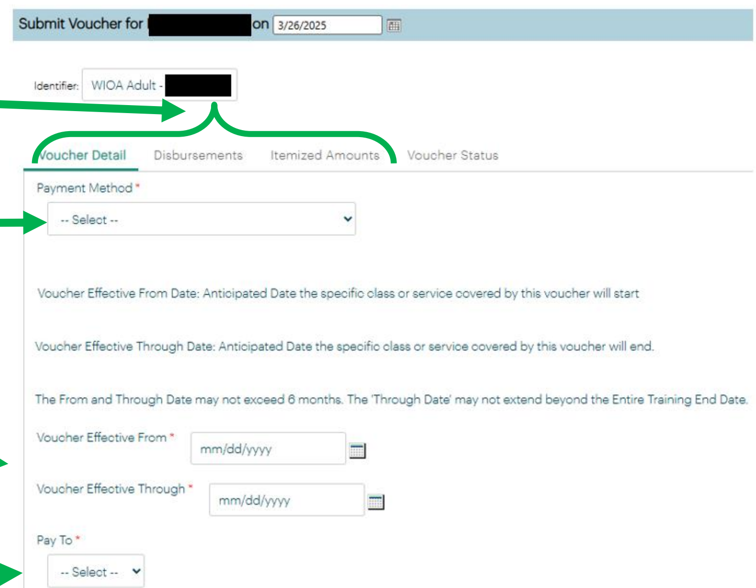
Vouchers are recorded to track funds that a participant is provided for training/education, supportive services or incentives. Voucher dates can be tricky. At the end of this section, see a special note on voucher date definitions.

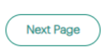
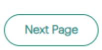
Please Note: A voucher cannot be created until a training/education, supportive service or incentive record has been created.

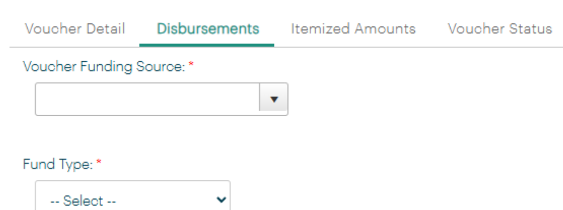
- From the Participant Dashboard, Select "+ New" button in the touchpoint.



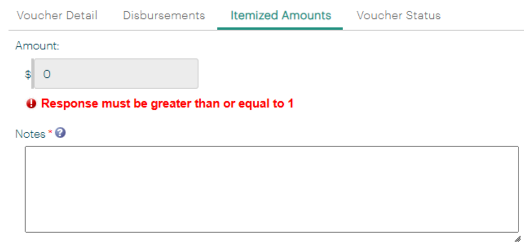
- Complete fields within Submit Voucher shown below.
- The Voucher Detail, Disbursements, and Itemized Amounts tabs must be filled out completely in order to save record.
- Use the drop down to select appropriate payment method or begin typing the method in the field which will narrow search based on what was typed.
- Voucher Effective dates may not exceed six months.
- Use the drop down to select appropriate payment recipient.



- At the bottom of the screen, click  to proceed to the Disbursements tab.
- Record the disbursements; at the bottom of the screen, click  to proceed to the Itemized Amounts tab.



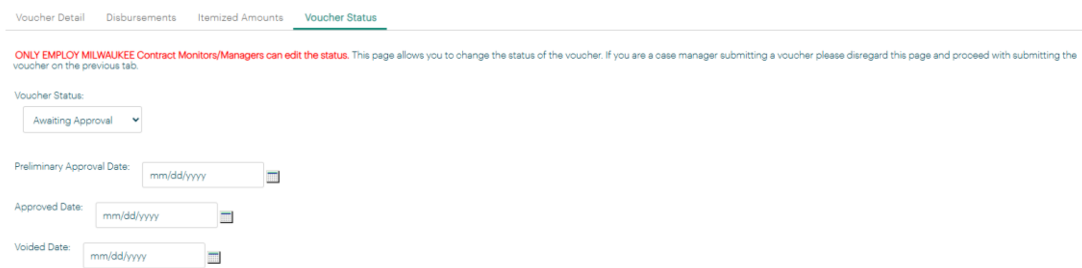
- Record the itemized amounts. These will populate differently based on the fund type that is selected above. If there are not any costs for a specific category, enter 0.



- The notes field must identify the specific items and amounts for each. Please note: Only the first three rows of the notes field will appear on the printed voucher.

- At the bottom of the screen click 

- The Voucher Status tab is for Program Specialists/Managers to update voucher status.



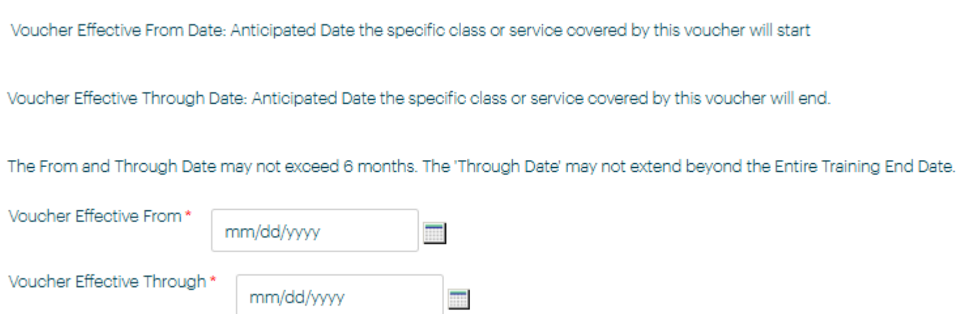
Voucher Date Definitions

Below is an explanation of the two sets of dates that appear on a voucher.

1. The Voucher Effective From and Through Dates are located on the Voucher Detail tab of the 'Submit Voucher' Touchpoint.

    - Voucher Effective From is the anticipated date the specific class or service covered by this voucher will start or be provided.

    - Voucher Effective Through is the anticipated date the specific class or service covered by this voucher will stop being provided. The time duration of the 'Effective From Date' to the 'Effective Through Date' should not exceed six (6) months. The 'Effective Through Date' may not extend beyond the Entire Training End Date.

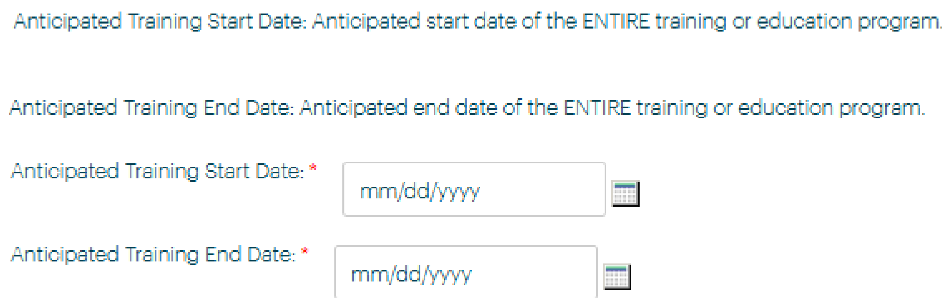


2. Anticipated Training Start and End Dates are located on the Disbursements tab of the ‘Submit Voucher’ Touchpoint.

    - Anticipated Start Date represents the start date of the entire training or education program. The entire program may include several semesters, or several terms of course work.

    - Anticipated End Date represents the end date of the entire training or education program.

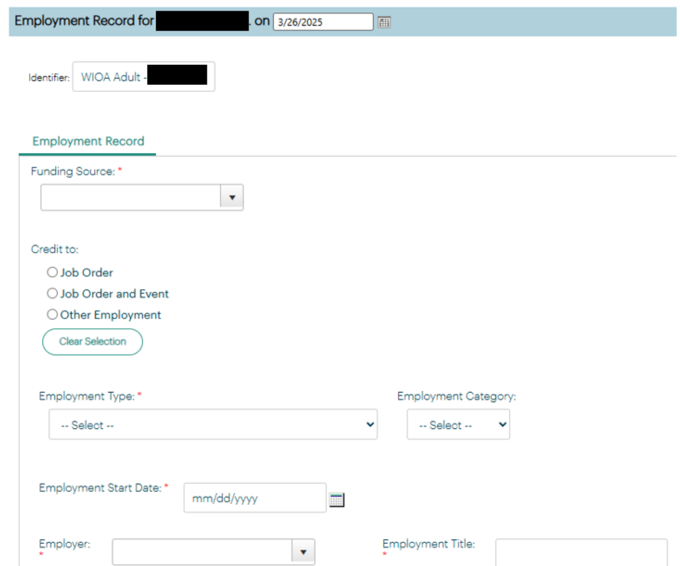
    - The entire program may include several semesters or several terms of course work.



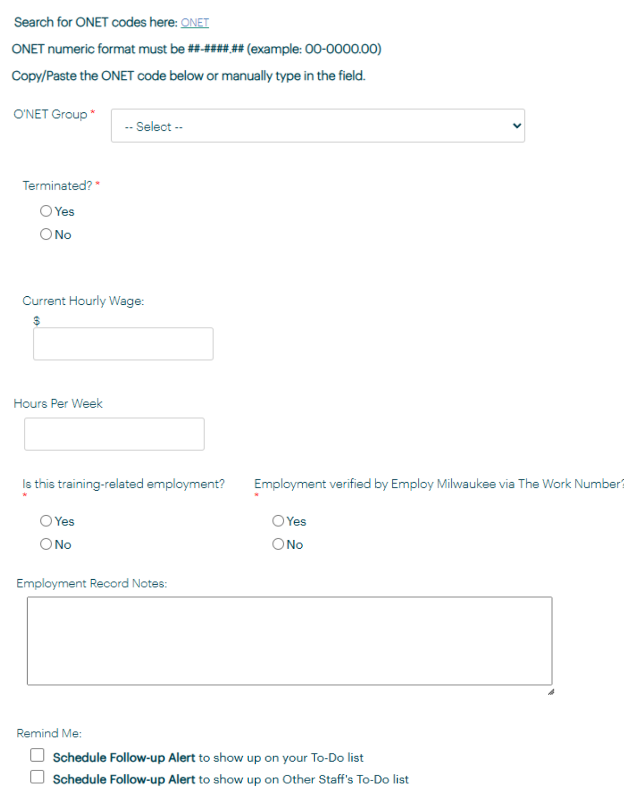
13. Recording Employment Records

Employment Records are recorded to track subsidized and/or unsubsidized employment.

- From the Participant Dashboard, Select "+ New" button in the touchpoint.
- Complete fields within Employment Record shown below.
- Record remaining employment record details.



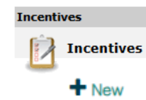
- Select appropriate 'ONET Group'. 'ONET Group' is based off the first two digits of the 'ONET Code'. Once 'ONET Group' is selected, another field populates where you select the ONET title. ONET title should be the same as the 'ONET Code'
- "Save" once complete. 



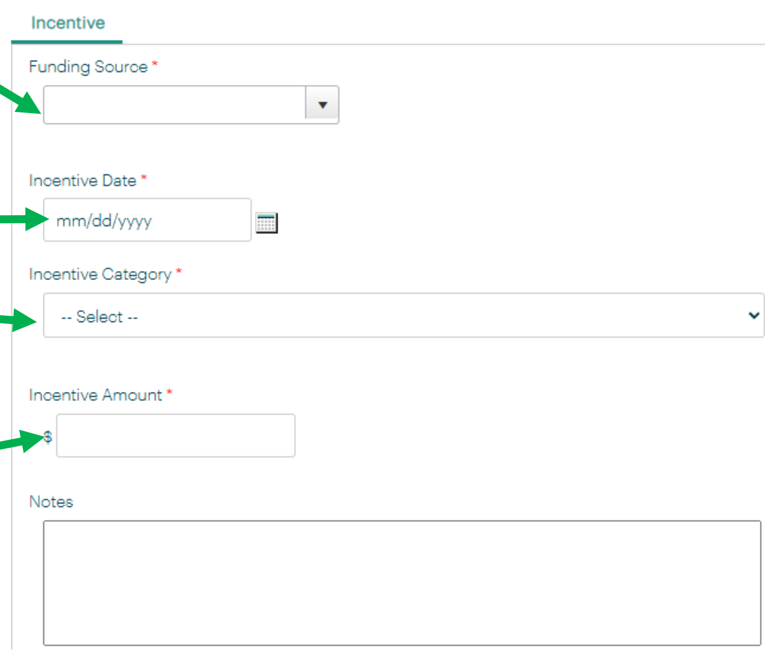
14. Recording Incentives

Incentives are recorded to track any incentives a participant earns.

- From the Participant Dashboard, Select "+ New" button in the Incentives touchpoint.



- Complete fields within Incentive screen shown below.



- Use the drop down to select appropriate funding source or begin typing the funding source in the field which will narrow search based on what was typed.
- Enter the date the incentive was earned.
- Use the drop down to select the appropriate incentive category.
- If incentive amount doesn't populate based on the selected incentive category above, add incentive amount.
- Click on "Save" once complete.
- Remember to proceed to Submit Voucher and enter a voucher for the incentive.

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