Contact with Non-Enrolled Persons

Battle Creek Community-Wide Non-Profit Database

Prepared and managed by Goodwill Industries of Central Michigan's Heartland

John P Recher

December 16, 2021

Table of Contents

Contact with Non-Enrolled Persons

Battle Creek Community-Wide Non-Profit Database

Introduction

Frontline staff regularly meets with people—prospective clients, curious people, those seeking something outside of our scope—for whom it is not feasible to obtain the personal information required to add them as a Participant in ETO. However, this is still information of value, and may lead to these persons becoming Participants in the future. Normally, a TouchPoint is tied directly to either a Participant or to an Entity. However, it is possible to use TouchPoints to record information that is *not* connected to either.

The "Contact with Non-Enrolled Persons" TouchPoint is an example of this type of TouchPoint. It's been created to record the very limited amount of data that may be obtained when interacting with people who are not, at the point of contact, involved in our programs.

This chapter describes this TouchPoint, including a Step-by-Step section that details each field, explaining the type of data the field is formatted for, the rationale behind the field, and what responses are expected.

Because of the unique nature of this TouchPoint, this is followed up with a section describing any reports created for this TouchPoint.

Contacts with Non-Enrolled Persons TouchPoint

Introduction

The "Contacts with Non-Enrolled Persons" TouchPoint is a short and simple form, not tied in any way to either Participants or Entities (known as a General TouchPoint), to be recorded from within the Partner Agencies' ETO programs, and it's a single-form TouchPoint (no Child). It can be recorded or edited from *Financial*, *Good Systems – BC Connect*, *KCC iACT*, *KCC Follow-Up*, *Michigan Works! Southwest*, *Woman's Co-Op*, and *Work Hardening – Goodwill* (as well as many of the programs on the Goodwill site).

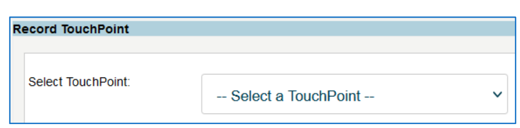
The drawback to these TouchPoints is they cannot be searched in any of the search mechanisms in ETO, which are dedicated to searching for Participants and Entities. You can see a list of them in the View General TouchPoints view table, or you can run the associated report and use that report—or Excel export file—to conduct a search (more on these reports later in this chapter).

This chapter assumes you know how to record TouchPoints, including how to access a list of available TouchPoints. If you are not familiar with these topics, there are other user guide chapters that explain them in detail.

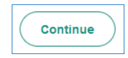
General TouchPoints

The process for recording and viewing General TouchPoints (TouchPoints not tied to either a Participant or an Entity) is somewhat difference from other TouchPoints. You will not, at any point, conduct a search for a Participant or Entity, but will start out immediately with a TouchPoint list.

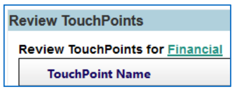
From either the Dashboard Menu at the top of your staff menu, or the Navigation Bar along the left side of the screen, go to the "TouchPoint" section. On the TouchPoint section of either menu, you can either select "Record TouchPoints" or "View General TouchPoints". There are advantages to either option. Selecting "Record TouchPoints" will save you a few mouse clicks, but "View General TouchPoints" will show you a much smaller list of TouchPoints to choose from, listing only *General* TouchPoints. Note: You will only be able to view previously recorded General TouchPoints through "View General TouchPoints".



"Record TouchPoints" will take you directly to the "Select TouchPoint" screen with a dropdown list box showing *all* the TouchPoints set to be recorded in the program you are in, including all the Participant TouchPoints. From there, you can select the General TouchPoint you want to record, and an oval "Continue" button will appear. When you click the Continue button, ETO will open a new TouchPoint screen.



"View General TouchPoints" will take you right to a **Review TouchPoints** page that will show the previously recorded *General* TouchPoints for that program. From there, you can click the oval "Take New TouchPoint" button and the "Select TouchPoint" screen will again appear. The list in *this* dropdown list box will only be for General TouchPoints and, when you select one, it will go immediately into the TouchPoint, bypassing the "Continue" button.



Record New TouchPoint

To record a new TouchPoint, select "Contact with Non-Enrolled Persons" from the TouchPoint list presented to you. The Date Taken field at the top of the TouchPoint will be blank by default, so you will want to enter the Date of Contact here.

This TouchPoint also provides for Staff Attribution, allowing another user to record the information for the Career Coach or Program Manager, and give credit to both.

Many of the fields are optional, while some are required. The Step-by-Step instructions will tell which ones are required.

Details

The TouchPoint begins by identifying the ETO Program the TouchPoint is being recorded or edited in.

Then you can enter what you were able to obtain of the person's name, hopefully the first and last name. This much is required. Then you will be asked if you were able to get a date of birth, or just have an estimated age. If you select "Date of Birth", a required DOB field will appear. If "Estimated Age" is selected, a required field to enter that estimated age will appear.

Next, you are able to enter—again what you are able to obtain from the visitor—their street address, apartment or lot number, city, state, zip code, and phone. You'll be asked the reason for the visit and how they heard about your program.

Finally, you can enter notes or comments, if desired, to save any observations or pertinent information to go with the record.

Completion

At this point, the TouchPoint is complete, and you can click "Save" at the bottom of the form to submit the TouchPoint and save it into the database. It will then appear only on the **Review TouchPoints** (View General TouchPoints) page for the program you are in.

Step-By-Step Instructions

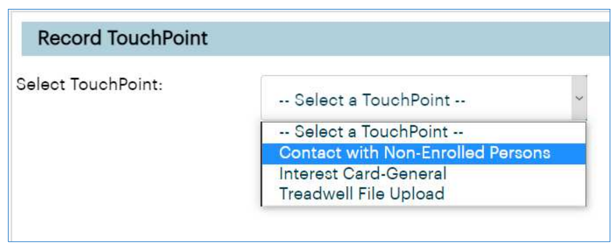
The following instructions will describe each field in the TouchPoint including: Type of field with data requirements (text in green), purpose of the field, conditional effects, and whether it is a required field or optional (required fields are labeled as such in red text). Some of the fields in this TouchPoint are optional, but it's best practice to always be as thorough as possible and complete even the optional fields to the best of your ability.

Record New TouchPoint

1. You can only record or edit this TouchPoint from within any of the Partner Agencies' ETO Programs, including *Financial*, *Good Systems – BC Connect*, *Michigan Works! Southwest*, *Woman's Co-Op*, and *Work Hardening – Goodwill*. Also, it can only be viewed or edited from with the program it was recorded in. If you are not already in your Agency's ETO Program, switch to it first.

2. Select "View General TouchPoints" from the TouchPoints section of either the Dashboard Menu or the side Navigation Bar. Click on "Take New TouchPoint" from the **Review TouchPoints** page that will open.

3. Select "Contact with Non-Enrolled Persons" from the dropdown list presented to you.

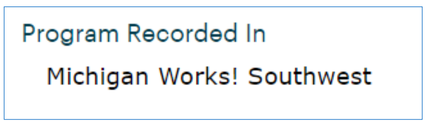


4. Complete the form as thoroughly as possible. The questions are described in detail below, and will tell which are required and which are optional.

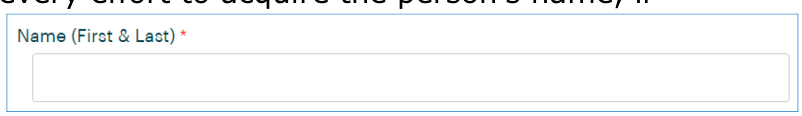
Date Taken: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This date will be blank by default. No other relevant dates appear on the TouchPoint, so this should be the date of contact. *Type the date directly into the box, or use the calendar control on the right side of it to select the appropriate date. This is a required field*.

Staff Attribution (Not shown on the form by this name): This is an exclusive choice (can choose only one) dropdown list box containing a list of all ETO Users with access to the program. This field allows you to have another staff member record or edit TouchPoints for you while still giving “credit” to the person with responsibility over the Participant. You cannot select your own name, so this field cannot be required. *If recording for another staff member, or editing someone else’s TouchPoint, select their name from the list. This is an optional field*.

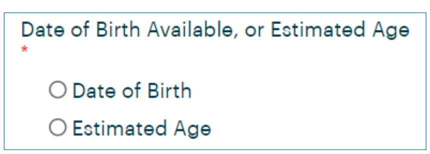
<u>Program Recorded In</u>: This is a non-editable cross-reference look-up field displaying—and recording—the name of the ETO Program the TouchPoint is being recorded in. In TouchPoints, this field can be used to trigger conditional programming in the TouchPoint as well as be used in reports. This field does both, triggering questions specific to the Program, but primarily used in reports for filtering and displaying the originating Program.

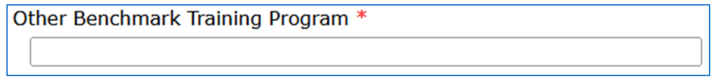


<u>Name (First & Last)</u>: This is a free-text field (75 characters). This is a key field, though a complete and exact name is not totally necessary. While you should make every effort to acquire the person’s name, if you are unable to get a name from the person, you can enter what you do get, or “N/A” to satisfy the validation. *Enter the first and last name of the person in the text box. This is a required field*.

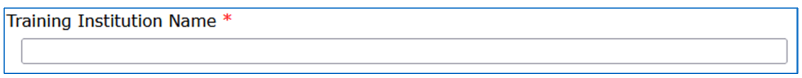


<u>Date of Birth Available, or Estimated Age</u>: This is an exclusive choice (can choose only one) option group with two available choices: “Date of Birth” and “Estimated Age”. You should try to collect a Date of Birth, if possible, but you often will not be able to get one. When a DOB is not available, this TouchPoint allows you enter an estimated age. This field tells ETO which of the two fields (described below) to present. If “Date of Birth” is selected, <u>Date of Birth</u> will appear immediately to the left. If “Estimated Age” is selected, <u>Estimated Age</u> will appear immediately to the left. *Select the appropriate indicator type from the option group. This is a required field*.

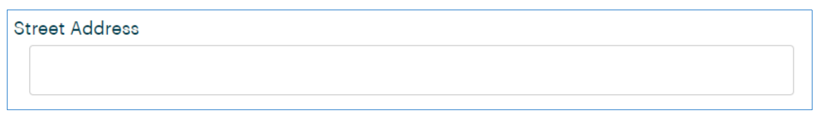




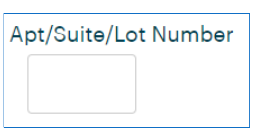
Date of Birth: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This question appears only if "Date of Birth" is selected for the previous field: "Date of Birth, or Estimated Age". *Type the correct date of birth for the person making contact directly into the box, or use the calendar control on the right side of it to select the appropriate date*. *This is a required field*.



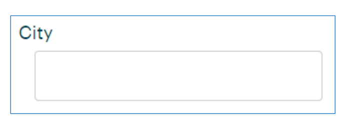
Estimated Age: This is a number field and accepts numeric characters only. This question appears only if "Estimated Age" is selected for the previous field: "Date of Birth, or Estimated Age". Precision is not required for this field, and it is acceptable to be off by 10 to 15 years, so just make the best guess you can based on your perceptions. *Enter the estimated age, in years, of the person making contact directly into the box*. *This is a required field*.



Street Address: This is a free-text field (75 characters). This is the same field as Address1 in the Add Participant form, and should be the street address of the person making contact, if you are able to get it from them. *If obtainable, type in the street address, using the addressing standards for ETO as outlined in Appendix A (ETO Data Entry Standards) at the end of the primary User Guide*. *This is an optional field*.

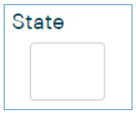


Apt/Suite/Lot Number: This is a free-text field (10 characters). This is the same field as Address2 in the Add Participant form, and should be used only for an apartment, suite, or lot number of the person making contact, if you are able to get it from them. *If obtainable, type the number directly into the text box*. *This is an optional field*.



City: This is a free-text field (75 characters). This field is used for the City portion of the person's address, if you are able to get it from them. *If obtainable, type the City name directly into the text box*. *This is an optional field*.

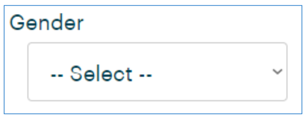
State: This is a free-text field (2 characters). This field is used for the State portion of the person's address, if you are able to get it from



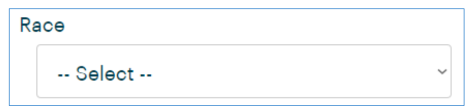
them. In virtually every case, this will be "MI". *If obtainable, type the State abbreviation code directly into the text box*. *This is an optional field*.

<u>Zip Code</u>: This is a free-text field (5 characters). This field is used for the Zip Code portion of the person's address, if you are able to get it from them. *If obtainable, type the Zip Code directly into the text box*. *This is an optional field*.

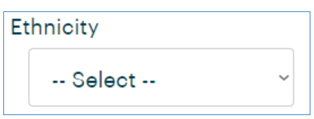
<u>Gender</u>: This is an exclusive choice (can choose only one) drop-down list box listing the same gender options currently used in ETO for our programs; including "Male", "Female", "Did not self-identify", "Transgender", and "Non-Binary". Demographic data like this is valuable if the person making contact is willing to supply it. *Select the appropriate gender from the list box. This is an optional field*.



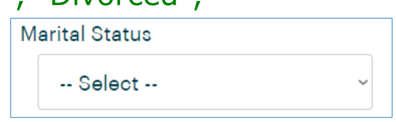
<u>Race</u>: This is an exclusive choice (can choose only one) drop-down list box listing the same options for race currently used in ETO for our programs; including "African American/Black", "Caucasian/White", "Native American/Alaskan Indian", "Other Race (including multi-racial)", "Asian", and "Native Hawaiian/Other Pacific Islander". Demographic data like this is valuable if the person making contact is willing to supply it. *Select the appropriate race from the list box. This is an optional field*.

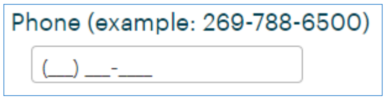


<u>Ethnicity</u>: This is an exclusive choice (can choose only one) drop-down list box listing the same ethnicity options currently used in ETO for our programs; including "Hispanic", "Non-Hispanic", and "Did not self-identify". Demographic data like this is valuable if the person making contact is willing to supply it. *Select the appropriate gender from the list box. This is an optional field*.



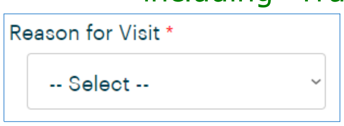
<u>Marital Status</u>: This is an exclusive choice (can choose only one) drop-down list box listing the same marital status options currently used in ETO for our programs; including "Single", "Married", "Divorced", "Separated", "Living with Significant Other", and "Widow/Widower". Demographic data like this is valuable if the person making contact is willing to supply it. *Select the appropriate marital status option from the list box. This is an optional field*.



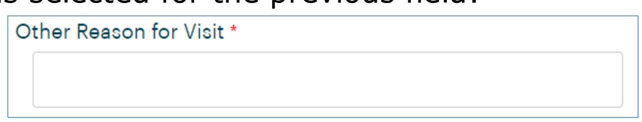


Phone: This is a number field formatted to display as a standard U.S. phone number. Contact information like this is necessary for follow up, if the person making contact is willing to supply it. *Type the correct phone number, including Area Code, directly into the box. This is an optional field*.

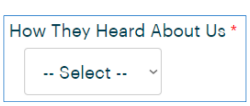
Accept text messages?: This is an exclusive choice (can choose only one) option group with three available choices: "Yes", "No" and "No SMS enabled phone". Software for managing and sending text messages to groups or individuals is available to some—if not all—of our Partner Agencies, but permission must be obtained to send a text to an individual before making contact this way. So, if the person making contact is willing to supply a phone number, do they give us permission to contact them by text (if the phone is a cell able to receive a text message)? *Select the appropriate choice from the option group. This is an optional field*.



Reason for Visit: This is an exclusive choice (can choose only one) drop-down list box listing common reasons for this type of contact; including "Transportation", "Utilities", "Childcare", "Housing", "Questions", "Referral to other agency", and "Other". This data will be analyzed later on to help improve services, and for recruiting purposes, so it will be necessary to know why they were there. *Select the appropriate reason from the list box. This is a required field*.

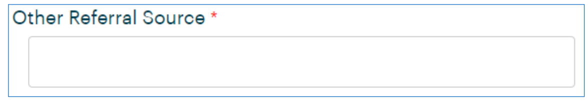


Other Reason for Visit: This is a free-text field (50 characters). This question appears only if "Other" is selected for the previous field: Reason for visit. *Type in a short descriptive text for an unlisted reason the person may have visited your location*. *This is a required field*.

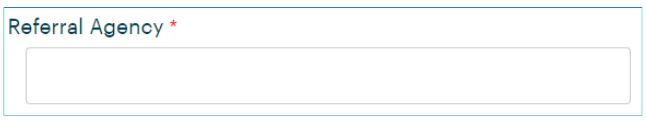


How They Heard About Us: This is an exclusive choice (can choose only one) drop-down list box listing common sources of information that led to this contact; including "Family", "Friend", "Walk-In", "Referral", and "Other". This data will be analyzed later on to help improve services, and for recruiting purposes, so it will be helpful to know how they came to know about your Agency and why they decided to stop in. *Select the appropriate referral source from the list box. This is a required field*.

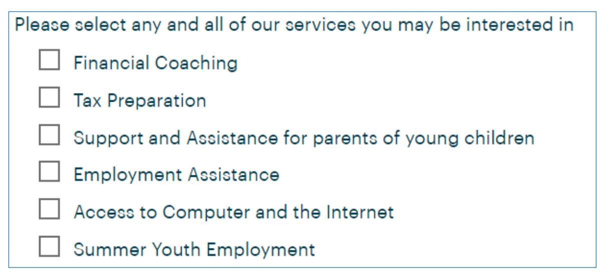
Other Referral Source: This is a free-text field (50 characters). This question appears only if "Other" is selected for the previous field: How They Heard About Us. If another common referral source becomes known, it can be added to the previous field's list of choices. Otherwise, even for a one-time referral, it is helpful to know the actual source rather than just using "Other". *Type in a short descriptive text for an unlisted referral source that may have led the person to visit your location*. *This is a required field*.



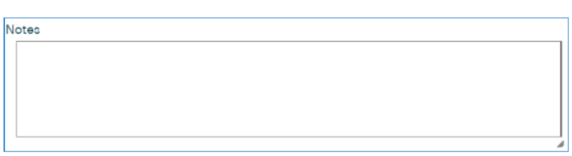
Referral Agency: This is a free-text field (50 characters). This question appears only if "Referral" is selected for the previous field: How They Heard About Us. If the person made the visit because of a referral from another agency, it is necessary for us to know what agency made the referral. *Type in a name of the referring agency directly into the text box*. *This is a required field*.



Please select and all of our services you may be interested in: This is a nonexclusive choice (can choose more than one) option group with a preselected list of options: "Financial Coaching", "Tax Preparation", "Support and Assistance for parents of young children", "Employment Assistance", "Access to Computer and the Internet", and "Summer Youth Employment". This question appears only if the first field, Program Recorded In, contains the name of a Goodwill of Central Michigan's Heartland program, so it only applies to Goodwill staff. This information will help Goodwill to effectively follow up on the contact and help provide the service the person making contact is interested in. A similar field can be added for other Agencies by request. *Select any and all services that apply*. *This is a required field*.



Notes: This is a free-text field (1000 characters). This field gives you an opportunity to record any thought, comments, or other pertinent information regarding the person making contact or about the contact itself. *Type in any concise descriptive text you*



believe will be helpful to understand the contact. *This is an optional field*.

Rev Block: This is a message text box that displays information only. This block shows the revision number (date) of the TouchPoint. This chapter was written for Rev 20211112.

Rev 20211112

5. Click the "Save" button at the bottom of the form to submit the TouchPoint to the database and save the form in completed status. ETO should return to the page from which you accessed the TouchPoint.

Reports on the TouchPoint

Custom reports showing the data in any manner that may be required can always be designed at any time. There are very few canned reports ready to use for this TouchPoint, but more can easily be created and added at any time by contacting the ETO Administrator.

Contact with Non-Enrolled Persons Report

At the time of this writing, there is only one report for this TouchPoint: Contacts with Non-Enrolled Persons. This report is available to all users at staff level and above in both sites. On the Community Access site, it's in the **Administrative - BCCA** category, and on the Goodwill site, it's in the **All GICMH Reports** category.

First, there is an *optional prompt* to specify a program the TouchPoint was recorded or last edited in. Being optional, you can leave this prompt blank to see all of these TouchPoints recorded for all programs within the date range. This is a convenience for you, if you only need to see your program, or a few programs. You can use the list and select more than one program, if needed.

The report will also prompt for a date range. This is a required prompt and the date range is for the creation date of the TouchPoint, meaning it will list all the TouchPoints recorded within the date range you enter at the prompts. These prompts are required, so you cannot proceed without entering valid dates for each.

The output to this report will show data in columns, in the following order: Date Taken, Program Recorded In, Originally Recorded By (name of the user who recorded the TouchPoint), Last Updated By (name of the user that last made a change to the report—usually the same as the previous column), Attributed Staff Name (if used, the name of the staff member given attribution for the TouchPoint by the original recorder or the last person to edit the TouchPoint), Name (the first and last name of the non-enrolled person recorded in the TouchPoint), DOB (date of birth, if available, recorded in the TouchPoint for the non-enrolled person), Estimate Age (estimated age, if used, recorded for the non-enrolled person), Full Address (Street Address, apartment-suite-lot number, City, State, and zip code recorded for the non-enrolled person), Phone Number, Reason for Visit, Other Reason for Visit, Referral Source, Other Referral Source, Referral Agency (if Referral was given for Referral Source, the name of the Agency making that referral), and Notes.

If you need to search for anything specific, export the report to an Excel file (see the chapter on Reports in ETO to instruction on how to do this) and use Excel's tools to search any column of data.

Incidental Contacts

TouchPoints Entered from 1/1/21 to 12/13/21

Date Taken	Program Recorded In	Originally Recorded By	Last Updated By	Attributed Staff Name	Name	DOB	Est Age	Full Address	Phone Number	Reason for Visit	Other Reason for Visit	Referral Source	Other Referral Source	Referral Agency	Notes
7/20/21	Michigan Works! Southwest	Travis,Barb	Travis, Barb		Justin Sheddan	7/30/91		90 Division #; Battle Creek, MI 49017	(269) 719-3340	Other	Re-enrollment- Dismissed 4/2021	Family			Inquired about t and was asked t of income for el
8/19/21	Michigan Works! Southwest	Travis,Barb	Travis, Barb		D'Chelle Howlett	11/6/95		#; Battle Creek, MI	(269) 601-3798	Other	enrollment	Referral		Michigan Works	Scheduled for c enrollment but c either.