Support Services TouchPoint

Battle Creek Community-Wide Non-Profit Database

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Introduction

Payouts to our Participants for basic daily needs—whether it be for bus cards or gas cards, or for rent or insurance—is a normal part of what we all do, so it's to be expected that ETO provides a means to track those payments. You may be used to referring to it as Work Supports, Income Supports, or another similar term, but it's all pretty much the same. In ETO we record them in a TouchPoint called "Support Services". Different agencies have different needs, and different purposes for support, so this TouchPoint adapts itself to fit those needs. The way you answer some questions, especially early on in the TouchPoint, different questions will appear, and some default values will even pre-populate.

A new function has been added to the TouchPoint recently to record support requests that have to be denied for various reasons. This allows our funders to determine if further funds need to be added to the grant for those areas in the future.

For those agencies paying out Incentives and Stipends, there is a means to record those as well. Details for each will follow below. Michigan WORKS! pays out regularly for both Incentives and Stipends, and will track those payments in this TouchPoint. KCC, also, has recently started paying a small incentive to participants to respond to follow-up requests and they will be able to record those payments by selecting "Incentive" as the payment type and "Quarterly Follow Up Incentive" as the reason.

Woman's Co-Op Participants that visit the Co-Op Store for supplies should have these visits recorded as a Support Service in this TouchPoint. To do so, select "Woman's Co-Op Store Visit" for the <u>Type of Payment or Support</u> field, "Woman's Co-Op" for <u>What vendor, if any, is providing support</u>, and entering the amount of value for the items provided (at the time of this writing, $65.50 for a half order, and $130 for a full order).

The TP has also most recently been adapted to allow recording the same information to multiple Participants at once. More on this will be explained as the chapter continues. *Fair warning: The group TouchPoint function can be very frustrating and difficult to work with at first. Normally, it takes a lot of trial and error coupled with continuous practice to get used to it. Previous to this writing, there has been no good documentation on the process, so it is strongly recommended that you read the section on recording group responses beginning on page 6.*

Support Services TouchPoint

Using the method most appropriate, navigate to the "Review TouchPoints" page for the participant you are working with (or go to "Record TouchPoints"). If the participant has TouchPoints previously recorded for them, check for "Support Services" among the listing and verify the support you are about to record has not previously been recorded.

<u>Best Practice:</u> *It is always good practice when recording any TouchPoint to make sure the same information hasn't already been recorded by another user. Since it deals with numbers that are calculated, totaled and aggregated, this is especially true with Support Services.*

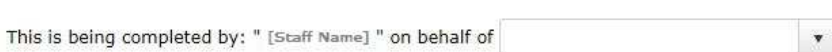
1. Click the "Take New TouchPoint" button at the bottom of the list (or click **<u>Take New</u>** to the right of an existing "Support Services" TouchPoint).

2. Select "<u>Support Services</u>" from the "Select TouchPoint" drop down box. The "<u>Support Services</u>" TouchPoint will open.

3. Enter the appropriate data in the fields as described below. Detailed information is given for each field, including the purpose and expectations for each field.

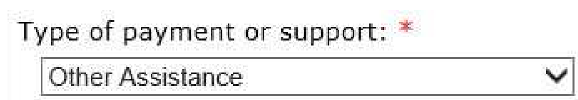
   <u>Date Taken</u>: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This is a group-response field that needs to be answered only once when recording for a group of Participants at once. This date will pre-populate as the current date by default for this TouchPoint. This should be the date of contact when the payout was made. If different from the current date, enter the correct date directly into the date box, or use the calendar tool to select the date. *This is a required field*.

   <u>Staff Attribution</u> (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 is a group-response field that needs to be answered only once when recording for a group of Participants at once. 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,*

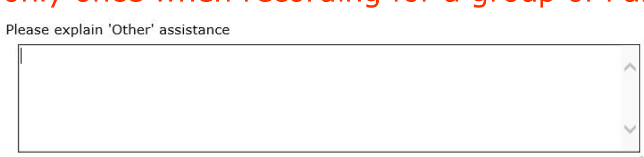


or editing someone else's TouchPoint, select their name from the list. This is an optional field.

Date received: 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 is a group-response field that needs to be answered only once when recording for a group of Participants at once. Most often, this date will match the "Date Taken" above. This should always be the date the payment was actually made either to the participant directly or—more commonly—to another receiver on their behalf. Type the correct date directly into the date box, or use the calendar tool to select the date. *This is an optional field*.



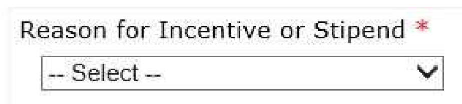
Type of payment or support: This is an exclusive choice (can select only one choice) drop-down list box with an all-inclusive list of pre-selected choices, including but not limited to Incentives, Stipends, and a group of Automobile related expenses. This is a group-response field that needs to be answered only once when recording for a group of Participants at once. For agencies that pay out incentives or stipends, this is where you must specify one or the other to trigger the questions that go with it. The answer selected for this field will trigger others to appear or disappear, and will change the choices available for some of the following questions. *This is a required field*.



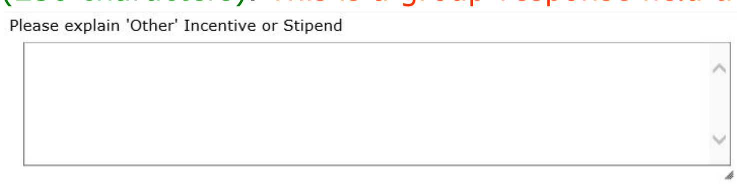
Please explain "Other" assistance: This is a free-text field (250 characters). This is a group-response field that needs to be answered only once when recording for a group of Participants at once. This question appears when "Other Assistance" is selected for the previous question: "Type of payment or support". Though not required, it is important to know what previously unrecognized type of assistance applies. Enter the response in as few words as possible, while making the answer clear. *This is an optional field.*

Reason for Incentive or Stipend: This is an exclusive choice (can select only one choice) drop-down list box with an all-inclusive list of pre-selected choices: "ServSafe Food Handler", "CPR/First Aid", "5

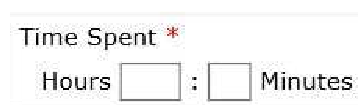
Employability Skills Workshops", "Maintained monthly employment", "Post release follow-up", "GED completion", "Employment related occupational", "Certification", and "Other" (for Incentives); and "Weekly training attendance", "Module completion", and "Other" (for Stipends). This is a group-response field that needs to be answered only once when recording for a group of Participants at once. This question will appear only if "Incentive" or "Stipend" is selected from the previous question, "Type of payment or support", and the choices available will automatically be limited to the choices appropriate for the selected type (as shown above). Select the correct reason from the pick list. If no appropriate answer is in the pre-defined list, select "Other" and a new question, "Please explain 'Other' Incentive or Stipend', will appear to allow you to explain in detail. *This is a required field*.



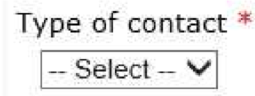
Please explain 'Other' Incentive or Stipend: This is a free-text field (250 characters). This is a group-response field that needs to be answered only once when recording for a group of Participants at once. This question appears when "Other" is selected for the previous question: "Reason for Incentive or Stipend". Though not required, it is important to know what unlisted reason applies. Enter the response in as few words as possible, while making the answer clear. *This is an optional field*.



Time Spent: This is a time field formatted to accept hours and minutes. This is a group-response field that needs to be answered only once when recording for a group of Participants at once. *This field will not appear if "Incentive" or "Stipend" is selected for the previous question: "Type of payment or support".* Type the number of hours in the box marked "Hours" and/or the number of minutes in the box marked "Minutes". This will help to track the amount of time spent on the behalf of each participant. Do not put only the time spent speaking with the participant, but consider all the time spent on their behalf as a result of this contact, including the time spent completing the TouchPoint. *This is a required field*.

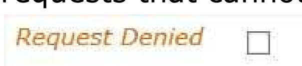


<u>Type of contact</u>: This is an exclusive choice (can select only one choice) drop-down list box with six pre-defined choices: “In person”, “Phone”, “email”, “Text”, “Social”, and “Other”. *<u>This is **not** a group-response field but still needs to be answered only once while recording for “All” in group-response TouchPoint</u>*. This question will not appear if “Incentive” or “Stipend” is selected from the previous question: “<u>Type of payment or support</u>”. Select the correct reason from the pick list. *This is a required field*.



<u>What vendor is providing support</u>: This is an exclusive choice (can choose only one) drop-down list box with choices, taken directly from the Entities table, having the Type of “Vendor” assigned. This is a group-response field that needs to be answered only once when recording for a group of Participants at once. This question will not appear if “Incentive” or “Stipend” is selected from the previous question: “<u>Type of payment or support</u>”. ETO will only list vendors assigned to your program in the database. If the vendor you need is not listed, you will need to add a new entity or assign an existing entity to your program if one already exists but is not visible in this list box. See the chapter on *<u>Working with Entities</u>* for information on this task. Select the correct vendor from the list. *This is an optional question*.

<u>Request Denied</u>: This is a single-option checkbox. To record support requests that cannot be fulfilled for any number of reasons, click this box to select it and other questions will appear to give details. Show the reason for the denial in the “<u>Notes & Comments</u>” field at the end of the TouchPoint. *This is an optional field*.



<u>If support request was denied…</u>: This is a line of instruction only. These instructions will only appear if the “Request Denied” checkbox has been selected, and reminds you to explain the reason for denial in the “<u>Notes & Comments</u>” field.

If support request was denied, please explain the reason or reasons in the Notes & Comments field below.

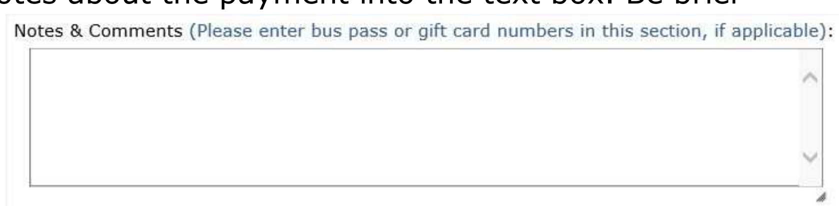
<u>For Woman’s Co-Op Store visits…</u>: If “Woman’s Co-Op Store Visit” is selected for <u>Type of payment or support</u>, a line of instruction will appear immediately above the <u>Amount of Payment</u> field to instruct the user to enter $65.50 for a half order and $130.00 for a full order.

For Woman's Co-Op Store visits, enter 65.50 for <u>Amount of Payment</u> below. Enter 130.00 for full order.

Amount of payment: This is a number field formatted for US currency. This is a group-response field that needs to be answered only once when recording for a group of Participants at once. *This field will not appear if the "Request Denied" box is checked*. If an actual payout has been made, type the amount of the payment here. If previous payments have been made to this participant, the total amount paid to them over time will appear in a line below the text box, as in the illustration, showing the total (this will include payments made in other programs by other agencies). For *KCC Follow Up*, if "Quarterly Follow Up" was selected for the previous question, "Reason for Incentive or Stipend", the amount of $25.00 will automatically pre-populate in this field. *This is a required field*.

Denied Amount Requested: This is a number field formatted for US currency. *This field will only appear if the "Request Denied" box is checked*. If a request for supports has been denied, type the *amount of the request* here. *This is an optional field*.

Notes & Comments: This is a free-text field (1000 characters). Type any appropriate notes about the payment into the text box. Be brief but detailed enough that others reading your note will be understand what happened and why. If the payment was denied, please state the reason for the denial here as well. *This is an optional field*.



4. Click on "Save" at the bottom of the form to complete the record.

Recording Group TouchPoint Responses

Recording TouchPoint responses for a group of Participants is both very similar and, at the same time, very different from recording individual responses. Recording group responses is not difficult once you understand the nature of the fields and how they work together in a group setting. Everyone who has used it has experienced a high level of frustration and difficulty, but that has been due to the lack of good documentation that explains the process and how to use it. Hopefully, this section will rectify this and make it easier to adapt to.

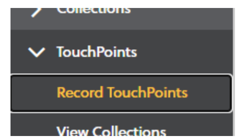
In the previous section describing the fields of the TouchPoint in detail, a line of text in orange: "This is a group-response field that needs to be answered only once when recording for a group of Participants at once" to any fields that have been set at the field level to record for multiple Participants. *These must be answered on the "All" tab's page.* The one exception to this is the "Type of contact" field and I will explain more on that a little later in this section. Remember this when we get to the part explaining how to complete the group-response form.

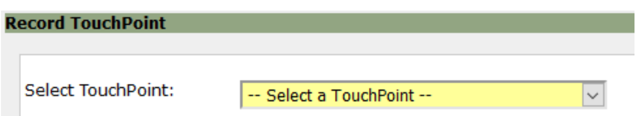
Starting a New TouchPoint

There are two ways to begin the process of completing a group-response TouchPoint; either by selecting a disconnected group of Participants in the New TouchPoint search result, or by recording for a Collection (Cohort). If your Agency uses Collections or Cohorts, you have the option of recording the same TouchPoint to all the Participants in the Cohort at once.

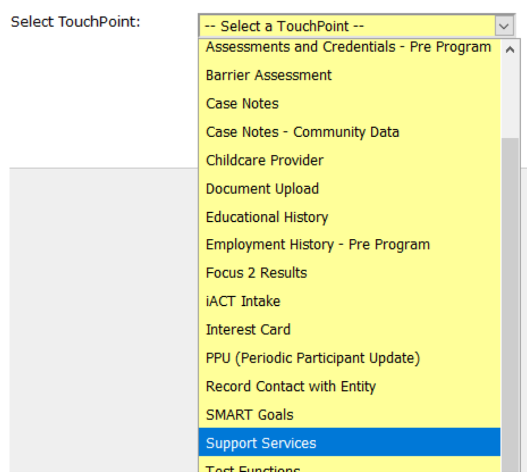
Disconnected-Group Selection

From the Navigation Menu on the left side of the screen, go to the TouchPoints section and select Record TouchPoints from the menu.

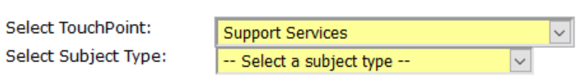


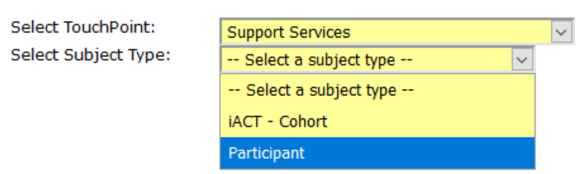


From the dropdown list box that will appear, select the desired group TouchPoint from the list—in this case, *Support Services*. *Note: All TouchPoints in the program will appear, not just the group-response TouchPoints.*

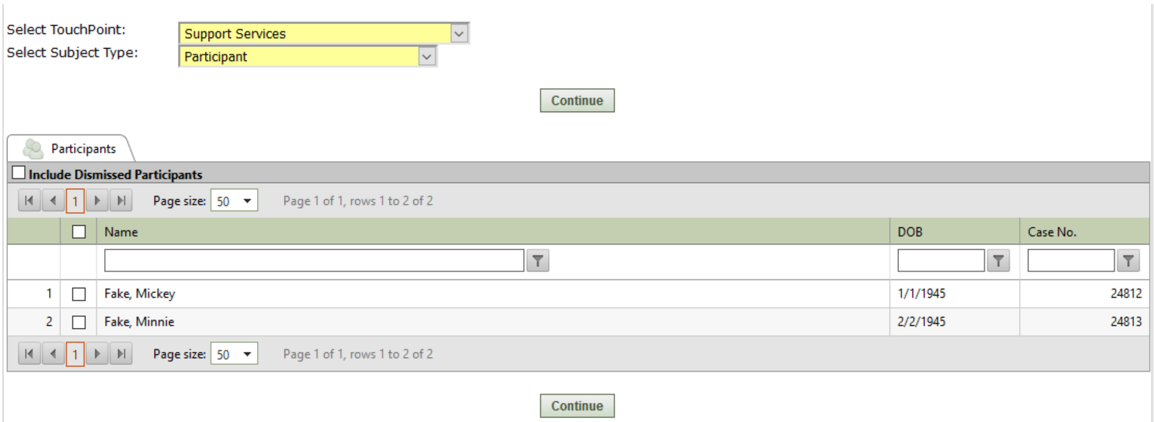


Once you select *Support Services*, because it is a multiple mode TouchPoint (able to record individual, group, or Collection responses), a second field will appear asking for a subject type ***if your program is set to use Collections*** (if not, it will skip this section and go directly to the select Participant screen). Some TouchPoints, not including *Support Services*, are designated for recording to Entities, and they may also ask for an answer to this

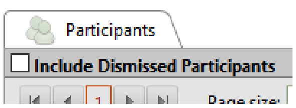




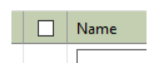
question, but the dropdown list will be different. For a disconnected group of Participants (not specifically related to each other aside from being in the same ETP program), select Participant. This will initially bring up a list of all *active* Participants in the program as illustrated below.



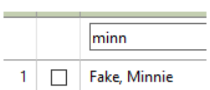
Normally, you will only be recording to active Participants, but you *can* record for dismissed Participants if needed by checking the box in the upper left corner marked "**Include Dismissed Participants**". This will make all Participants that have ever been enrolled in the ETO program appear and allow you to select them.



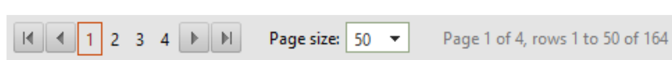
You can select everyone in the list by checking the box at the top of the list on the header row.



Below the header row is a filter box you can use to search for a specific Participant within a larger list of them. Simply type any part of the name in the filter box in the Name column and either hit the <Enter> key or click on the filter icon on the right side of the filter box. Notice from the included example you can use *any part* of the name, not necessarily the first characters in the string. You can also use the Date of Birth or ETO Case Number if those are the only things available or they are easier to use.



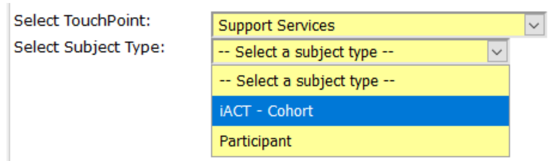
Click in the checkbox next to the names of the Participants you want to include. While there is technically no limit to the number of Participants you can include, it may be easier to manage—especially when first starting out—if you limit the number to 25 or 30 at a time. ETO will initially display 50 Participants to a page. If necessary, you can navigate the pages, or change the number of Participants on a page, with the navigation tools at the bottom of the list.



Once you've selected the Participants, click the "Continue" button at either the top or the bottom of the page. The group-response version of the TouchPoint form will open.

Collection (Cohort) Selection

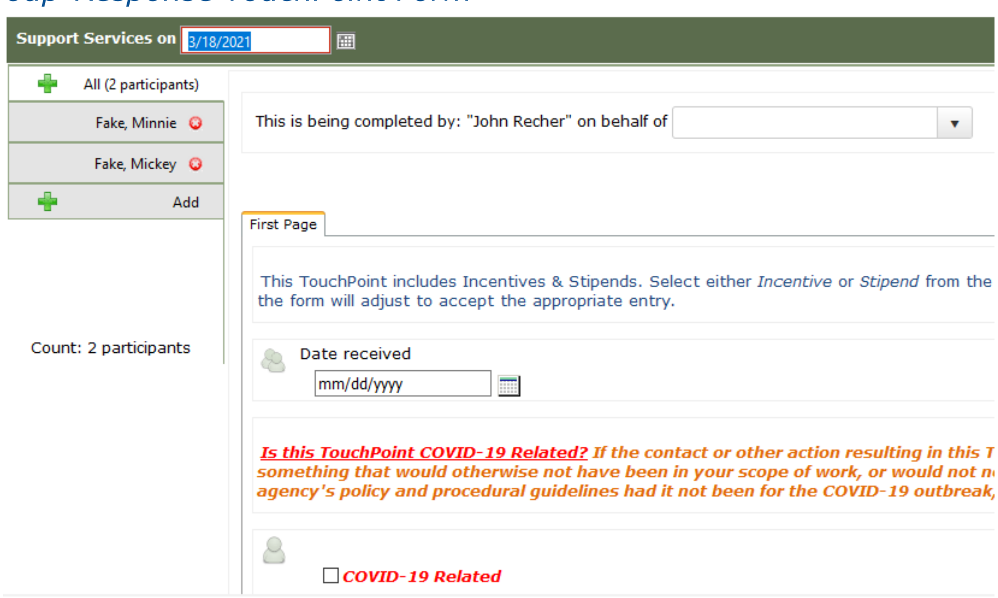
If your Agency uses Collections or Cohorts, you can select the Collection Type from the "Select Subject Type" dropdown list at the Select TouchPoint stage of the process. At the time of this writing, only KCC uses Collections, and their Collection Type is "iACT – Cohort". Select this from the "Select Subject Type" list box and a list similar to the Participant list from the Disconnected Participant Group in the above section of this chapter will appear, though this one will list all of the Collections that have been used in the program. Collections are permanently and irrevocably tied to *one* ETO program, and remain within the system even when all the Participants have been dismissed.



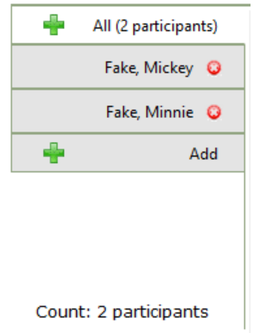
Find the Collection or Cohort you want to work with and click the checkbox next to the name to select it. You can work with more than one Collection at a time, if needed. Once you have selected the Collections, click the "Continue" button at the top or bottom of the page. Again, the group-response version of the TouchPoint will open.

Completing the Group-Response TouchPoint Form

Much of the form will look the same, as the actual TouchPoint form will appear within the greater form. There is still only one "Date Taken" field at the top, and the response will record the same to all



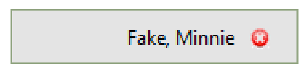
Participants included in the group. The same goes for the Staff Attribution field below it.



In a pane on the left side of the form, a list of the Participants included in the group you selected in the previous step will appear. Each name is on a separate tab or button, and two different tabs appear, one above and one below the name tab: "All (with Participant count)" and "Add".

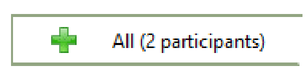
If you realize you need to add one or more Participants to the list, you do not need to either start over, or do the TouchPoint again for that one or two

Participants. Click on the "+ Add" tab and ETO will reopen the Participant selection page from the previous step. *Note: If you click this button, ETO will not let you return to the TouchPoint form without selecting a Participant, but will return to the Select TouchPoint page.* Find and select the Participants you need to add and click the "Save" button on the bottom, and ETO will return you to the TouchPoint form, showing the new Participants on their own tabs.



If you do not want one or more of the included Participants to have the data recorded to them in the TouchPoint, you can also remove them from the group without having to

start over. There is a small red icon to the right of the Participant's name on their tab with a white X in the center. To remove them, simply click on that red circle icon and a confirmation modal box will appear asking is you're sure you want to delete them. Click "OK" to confirm or "Cancel" to continue.



By default, when the form opens the "All" tab will have the focus and appear white while all others appear gray. The active tab will appear white and it's important to understand that ETO will *not allow* you to switch from one tab to the another if there are any required questions that apply to that tab left unanswered. This means, if you are on the All tab, you have to answer all the required questions that are set to record to multiple Participants. Likewise, if you are on an individual Participant's tab, you cannot switch either back to the All tab or to another Participant until

> Important: *ETO will not allow you to switch between tabs, including the All tab and the individual Participant tabs, if there are any pertinent required questions on the page that are unanswered.*

you've answered the required questions that are set as individual questions. This can get both very frustrating and very confusing, but with patience you can get through it, and knowing about it in advance can help avoid the issue.

Start with the Multiple-Participant questions as describe in the Step-by-Step section above. Answer all these questions on the All tab, and then step through the Participant's tabs to answer the individual questions. It does not hurt to answer the individual questions while on the All tab, but it's not necessary to do so and they will not save to the individual Participant's TouchPoint. Normally, though without consistency, the individual question fields will appear blank on the All tab's page. Multiple-Participant fields will always be grayed out when viewed on the individual tab pages.

One major exception to this is the "Type of contact" field. Because the *Support Services* TouchPoint was originally built only for single Participants, this field was not set to record for multiple Participant, and it cannot now be changed as the other fields were because it is a kind of field that cannot be changed once it's added to a TouchPoint. Curiously, when this question is answered on the individual tabs the response is not saved. However, if answered on the All tab, the response ***is*** saved in each Participant's TouchPoint—completely contrary to normal operation. So, make sure you answer this specific question on the All tab's page.

Important: *Record a response to the "Type of contact" field on the "All" tab. Because of the type of field, it will not save the responses recorded on individual Participant tabs.*

Once all the fields are answered as described in the Step-by-Step section of this chapter, click on "Save". You may want to check the recorded TouchPoints for some of the Participants the first few times you record a group-response TouchPoint to make sure everything recorded as it should. Once you confirm a few were recorded correctly, you can be confident you are doing everything correctly and that ETO will retain the records you record in the future.

If any difficulties arise, contact the ETO Administrator for assistance.