TouchPoints with Sub-Forms

Battle Creek Community-Wide Non-Profit Database

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

John P Recher

February 19, 2021

Table of Contents

TouchPoints with Sub-Forms

Battle Creek Community-Wide Non-Profit Database

TouchPoints with Sub-Form (Parent/Child)

Sometimes it is appropriate and desired to keep track of changes (outside of the aggregate increase function which tracks only the **rate** of change) of certain bits of data associated with another key data point. A good example of this would in the case of a participant's record of employment.

You may record that a participant has taken a job with employer A on a certain date at a determined rate of pay, but you make regular follow-up contact with that participant and want to be able to see when things change with that same employer. You want to track the date the change occurred and what the new data without losing the previous data. It would not be appropriate to record the same employment information again as it would appear as a new employment when it's only a follow-up to the same employment. ETO provides a way to accomplish this in what they call a TouchPoint *Sub Form*.

<u>*When a Child (Sub) Form exists in ETO it cannot be seen from any list of TouchPoints*</u>. Only the Parent (Main) Form is visible in these lists. You may not ever even know the name of the Child TouchPoint. The Parent Form will be unique in that a TouchPoint dashboard will become available when one has been completed and saved. TouchPoint dashboards exist **only** for TouchPoints with a sub form associated with it, and a link to the dashboard will appear wherever you can see a completed TouchPoint record as in the figure below.

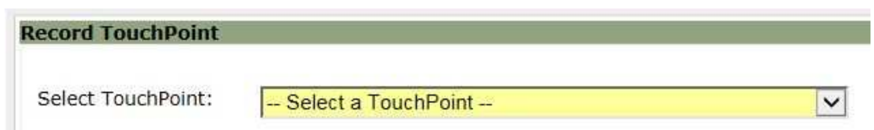
ETO Child Forms are not sub forms in the normal sense. In most database systems a sub form exists as an *actual part* of the main form, rather than as a separate form simply *associated* with the main form as in ETO. In ETO, the Parent Form/Child Form are merely two TouchPoints associated in a

Parent/Child relationship—one Parent record, multiple Child records. Since the Sub Form can only be accessed *through* the Main Form, they are permanently linked one to the other. You should look at the main form as data that doesn't—and cannot—change about that record (employer name, dates of hire, etc.) while the sub form contains changeable data (job title, rate of pay, etc.) about that employment.

Unfortunately, this also complicates the process slightly. If you go looking for the Child Form to complete a new record, you will not be able to find it, and to review previously entered Child Form data, you will have to first find the Parent TouchPoint and access the Child TouchPoint *through* the parent. There are now two ways to do this, either through the Participant's **Review TouchPoints** page or—when available—through a customized dashboard part on the Participant's dashboard. We'll look here at these processes in the example of an employment TouchPoint.

Main Form/Sub Form Process

The first step must always be to record the Parent TouchPoint. From the Select TouchPoint list box, select the name of the TouchPoint you need to work with, "Goodwill Employment" in the case of this example.



When the TouchPoint form opens, enter the appropriate data in the form as applies. In the case of this example you will record the Employer's name, Hire Date, and similar information. Once you've saved the record, the follow-up process can begin.

To add follow-up information, cause the TouchPoints for the participant you are working with to be displayed in whatever way is customary and convenient for you—through the participant dashboard, from the Quick Search context menu, or View/Participant TouchPoints—and look for the previously recorded Parent TouchPoint ("Employment", in this case). Wherever you've started the Parent form from, ETO will automatically return you there once the Parent form is saved, making it much easier to view and create Child form records.

From the **Review TouchPoints** page, click on the "+" icon to the left of the TouchPoint heading to expose the details for that TouchPoint.

The only thing to denote this as a parent TouchPoint in this view is the addition of a new icon in the "Take Action" column. This fourth icon is meant to look like an analog dial, such as a speedometer or tachometer, and represents the TouchPoint dashboard.

Click on this icon and the TouchPoint dashboard will open, displaying the main TouchPoint with its responses on the left and any Sub Form entries on the right. If there are no Sub Form responses recorded yet, as in this example, it will say "There are no recent TouchPoints for this participant." If some have been recorded, they will be listed here.

To record a new follow-up record, click on the "**+** New" link at the bottom of the list and ETO will open the TouchPoint Child Form. On this TouchPoint you can record the rest of the data regarding that employment.

The new TouchPoint record will then be listed with the others previously recorded and all the data will, of course, be available for a report what can show those changes.

From the Participant Dashboard

Some of the key Parent/Child forms have a section dedicated to them right on the Participant's dashboards. This dashboard part is adapted specifically to the TouchPoint it's designed for, and can display in a table view any—or all—of the fields from that TouchPoint as in the example illustrated below from the Goodwill site. The greatest advantage to this setup is you can very easily go back and forth from Parent to Child without having to start all over every time.

Goodwill Employment

Goodwill Employment

Take Action	Dashboard	Program	Date Completed	Date Last Updated	Last Updated By	Attributed Staff Name	Status of Employment	Work Experience or Direct Hire	Employer	Date of Hire	Termination Date
	Goodwill Employment Dashboard	Goodwill Connects	8/14/2018	1/8/2021	John Recher		Active	Direct Hire	Goodwill Retail Store - Helmer - BC	8/12/2018	
	Goodwill Employment Dashboard	Goodwill Connects	7/12/2018	2/3/2021	Batch Upload		Terminated	Subsidized Work Experience	Goodwill Retail Store - Helmer - BC	6/28/2018	8/11/2018

+ New

Included in this table view is a column—always the first column behind the "Take Action" column—with links to the Parent TouchPoint's dashboard where the Child TouchPoints can be viewed, created, and edited.

The TouchPoint dashboard is customizable as well. Either the top pane or the left pane shows all the answers given for the Parent TouchPoint (questions not answered will not appear at all). In the right pane, or directly below, another table view of the Child forms, again showing any or all of the fields from the TouchPoint selected by the administrator.

TouchPoint Information

Devon Amerson's

Status of Employment:	Active
Is this a Goodwill placement:	Yes
Work Experience or Direct Hire:	Direct Hire
Employer:	Goodwill Retail Store - Helmer - BC
Date of Hire:	8/12/2018
Is this a *Goodwill Connects* placement specifically for Phase II Work Experience?:	Yes
Who is the Career Mentor?:	Whitni Roden
Supervisor Name (Enter "N/A" if name is unavailable):	N/A
Initial Case Note:	GW Connects Phase III

Recent TouchPoints

Devon Amerson's Recent Goodwill Employment Sub-Form

Take Action	Program	Date Completed	Date Last Updated	Last Updated By	Attributed Staff Name	Initially Recorded By	Entry Type	Current Employment Status	Employer	Job Title	Rate of pay	Avg Hrs/Week
	Job Development - Battle Creek	1/1/2020	2/19/2021	John Recher		FOC Intern	Follow-up to previous job/employer	Still with same employer - Data Change	Goodwill Retail Store - Helmer - BC	Associate	$9.65	20
	Job Development - Battle Creek	1/1/2019	2/19/2021	John Recher		John Recher	Follow-up to previous job/employer	Still with same employer - Data Change	Goodwill Retail Store - Helmer - BC	Associate	$9.45	24
	Job Development - Battle Creek	8/14/2018	4/25/2019	John Recher		John Recher	New job/employer				$9.25	32

+ New