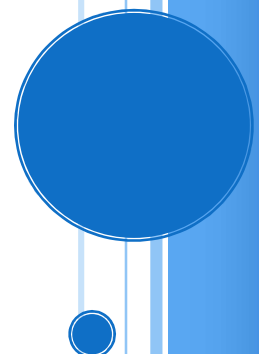


INTEREST CARD

*Battle Creek Community-Wide Non-Profit
Database*

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

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March 29, 2019



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INTEREST CARD

Battle Creek Community-Wide Non-Profit Database

INTRODUCTION

One of the programs on the **BC Community Access** site is Interest Card. Although this program was created for KCC to track potential future students without skewing the iACT program numbers, everyone with access to the site should also have access to Interest Card so they can easily send referrals to KCC iACT.

This chapter details the procedures for taking physical KCC iACT interest cards, getting the information into ETO, and referring them over to KCC. As with every chapter, this one will start with concepts for those of us who need to know the nuts and bolts of how things work, and then there will be a Step-by-Step section detailing every step of the process including what kind of answers are expected and accepted. If you want to skip to the nuts and bolts of the matter, and make this as short and simple as I'm able to make it, skip to the Step-by-Step section beginning on page 9.

Add New Participant

Ideally, all new participants should be entered through the Community Pre-Enrollment program. However, there are several detailed bits of data required to enter a new participant through that program, so Interest Card was also set up to take intake demographics for new participants, with only the most basic of information being required.

New participants entered through Interest Card should be enrolled into Community Pre-Enrollment as well, by making a referral.

If you are going to refer a participant that is already enrolled in your program and in Community Pre-Enrollment, then you do not need to add them as a new participant through Interest Card. In that case, just make a referral to interest Card (the procedure for this will be covered later in this chapter), and proceed from there.

Quick Search

As a best practice, always check for an existing participant record before adding a new one in any program. This is best done with what used to be

called Quick Search. This is now at the top of the ETO window and is always present.

Type a few letters from the participant's name in the first box of the search bar where it says "Search Term(s)...". You can immediately press the

Search Term(s)... Within Participants In Interest Card SEARCH

<Enter> key and ETO will search the area specified in the third text box simply marked "In". By default, this box is set to the current program you are in (Interest Card in the example shown above). Optionally, you can search the whole **BC Community Access** site by selecting the site name from the same drop-down list box, as shown below.

Search Term(s)... Within Participants In BC Community Access SEARCH

Unfortunately, there is no way to search the entire enterprise, including the Goodwill site where there are almost 7000 participants already entered in ETO, to avoid potential duplicates. The only way to do this would be to attempt an Enterprise Enroll—described later in this chapter—and see if the

Quick Search Results

Matches for: mic fak
Total Participants: 3

Filtered by			
Last Name, First Name			
Participant Name	Site	DOB	Site Enrollment
Fake, Mickey	Goodwill Central Michigan Heartland		Currently enrolled in site
Fake, Mickey	Goodwill Central Michigan Heartland		Currently enrolled in site
Fake, Mickey	BC Community Access	11/18/1928	Currently enrolled in site

participant exists on the other site.

It is okay if you do not search the other site, but you may get an error message warning that the participant you are trying to enter is a potential

Duplicate Information

You are attempting to add a new participant with potential matches in the system. Duplicate Check data points are selected on the 'Manage Demographics' page.

First Name: Cherise
Last Name: Fake
DOB: 02/14/1995

There are potential matches for this new participant.

Add as New

Name	Site	SSN	DOB
<input type="radio"/> Cherise Fake	Goodwill Central Michigan Heartland		02/14/1995

Cancel Continue

duplicate. The example shown above was being entered through Interest Card on the **BC Community Access** site. Notice that it found someone with the same name and date of birth on the **Goodwill Central Michigan Heartland** site. Date of Birth and Social Security Numbers (last 4 digits) are

displayed on this message to help you determine if they are the same person or not (Goodwill does not record SSN's).

When you get this warning, you have three options. You can Cancel, Continue, or Add as New (since "Continue" and "Add as New" do essentially the same thing, "Continue" appears to be currently inoperative). Best practice is to Cancel the entry and use Enterprise Enroll to bring the participant over to your site and program. This will be described a little further into the chapter.

Choosing to "Add as New" will not create a duplicate entry on your own site (unless the potential duplicate is already on your site as well) but the demographic information would not be able to connect or update data from one site to the other and these duplicates also cannot be merged as they can if they are on the same site, so it is best *not to*. Add as New should only be chosen if you are completely certain they are not the same participants.

[Add New Participant](#)

The Intake Demographics form on [Interest Card](#) does not have near as many data points to collect as the one on [Community Pre-Enrollment](#), and not nearly as many are required. All of these should be contained on the physical Interest Card for the KCC iACT program.

In the form, Enrollment Date will default to the current date, but can be changed if appropriate. Enter as much data as is available to you. The fields that are required are "First Name", "Last Name", "DOB", "Address 1", "Zip Code", "Gender", "Race", "Ethnicity", and "Family Status".

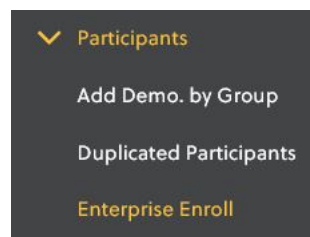
Once a new participant is entered, and therefore enrolled, into [Interest Card](#), they should be manually enrolled in [Community Pre-Enrollment](#) as well.

[Enterprise Enroll](#)

When you find that a new participant exists on the other site, **Goodwill Central Michigan Heartland**, (or you want to see if there is a potential duplicate) it's a simple matter to pull them across to **BC Community Access** and enroll them in [Community Pre-Enrollment](#) and whatever other program you need them in.

Select [Participants | Enterprise Enroll](#) from the Navigation Menu (on the right with the old IU and on the left of the New UI). ETO will open a search page.

The Enterprise Enroll search function works the same way that the Quick Search function does. Two or three letters



Enroll a Participant in Community Pre-Enrollment

Search for a participant or family to enroll based on your search settings
Participant search will return results based on: Full name, SSN

Only one field will be used to search at any given time.

Participant Search

from one or both names is all you need to find the participant you need to enroll (or search for a potential duplicate). Alternatively, you can leave the search box blank and ETO will show a list of all participants in the entire enterprise that are not currently enrolled in the program you are logged into.

Enroll a Participant in BC Public Schools

Search for a participant or family to enroll based on your search settings
Participant search will return results based on: Full name,

Only one field will be used to search at any given time.

Participant Search

Below are all participants who are not currently enrolled in BC Public Schools with participant information 'mic fak'.

<input type="checkbox"/>	Name	DOB	Sites Enrolled
<input type="checkbox"/>	Michey Fake		Goodwill Central Michigan Heartland
<input type="checkbox"/>	Mickey M Fake		BC Community Access, Goodwill Central Michigan Heartland
<input type="checkbox"/>	Mickey M. Fake	11/18/1928	BC Community Access, Goodwill Central Michigan Heartland

Type two or three letters of the first and last names in the search box and click the "Search" button (or press <Enter>). ETO will display any matching participants, as shown below. The list will show participant names, Date of Birth, and the sites they are currently enrolled in. It will *not* show participants already enrolled in the program you are logged onto.

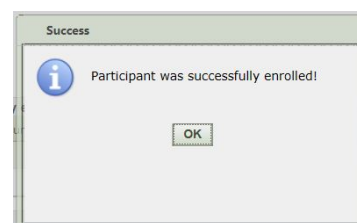
Single-Participant Enrollment

Click to select the check box next to the name of the participant you want to enroll and ETO will show (for a single participant) a date control where you can enter a Program Start Date, with the current date entered by default, and an "Enroll Participant" button. Set the date—if you don't want the current date to be used for the Program Start Date—and click the "Enroll Participant" button.

<input type="checkbox"/>	Name	DOB
<input type="checkbox"/>	Michey Fake	
<input checked="" type="checkbox"/>	Mickey M Fake	
<input type="checkbox"/>	Mickey M. Fake	11/18/1928

*** Program Start Date:**

A success modal window will pop up once ETO has successfully completed the enrollment.



Multiple-Participant Enrollment

You can enroll more than one participant at a time through this process if they happen to appear in the search results. Simply click the check boxes of

<input type="checkbox"/>	Name	DOB
<input type="checkbox"/>	Mickey Fake	
<input checked="" type="checkbox"/>	Mickey M Fake	
<input checked="" type="checkbox"/>	Mickey M. Fake	11/18/1928

- ☐ Enroll Selected Participants with Different Program Start Dates
☐ Enroll Selected Participants with Same Program Start Dates

[Continue](#)

all participants you need to enroll. Once you select more than one participant, ETO will display an option list with two choices: "Enroll Selected Participants with Different Program Start Dates" and "Enroll Selected Participants

with Same Program Start Dates".

If you need them to have different Start Dates, ETO can work with that. Click on the first option, "Enroll Selected Participants with Different Program Start Dates", and ETO will switch to a new window displaying the choices you've made with date controls for each, as shown here.

Search for a participant or family to enroll based on your search settings
Participant search will return results based on: Full name, SSN

[Back to Search](#)

Participant Name	Start Date
Mickey Fake	* 4/1/2019
Mickey M. Fake	* 4/1/2019

[Enroll Participants](#)

Set the dates for each participant in the individual date controls and click the "Enroll Participants" button

If you want to use the same date for all selected participants, select the other option, "Enroll Selected Participants with Same Program Start Dates", and ETO will switch to a similar window listing the selected participants on the right with a single Program Start Date control on the left. Set the desired

[Back to Search](#)

* Program Start Date: 4/1/2019

Participants
Mickey M Fake
Mickey M. Fake

[Enroll Participants](#)

date and click the "Enroll Participants" button.

All participants should exist in Community Pre-Enrollment. This is where they should start and, when they are dismissed from all other programs, their records should continue to reside there. With that in mind, please make sure when doing Enterprise Enroll that you get them into Community Pre-Enrollment as well by whatever method seems easiest.

Interest Card TouchPoint

It might be a bit confusing, but there is also a TouchPoint that should be completed for Interest Card, also named "Interest Card". There are two to four data points that are not collected in the intake demographics: Date the card was completed and "How did you hear about us?" (with extra details).

Once a new participant has been added to the Interest Card program, record a new TouchPoint, "Interest Card", for the participant. To make things easier for you, all the data points already collected in the intake demographics form are auto-populated on the TouchPoint. These field names will appear in blue to designate data already collected. You can scroll through them to verify the information is correct, but you cannot make any changes in the TouchPoint. If changes need to be made, you will have to go to the View/Edit page for the participant and change it in the demographics form. The very first and very last questions will be in black and have editable data fields.

Complete the "Date Completed" and "How did you hear about us?" questions, and click "Save" at the bottom of the TouchPoint.

Conclusion

That's all there is to it. There are no other TouchPoints that should be completed from within Interest Card.

If the participant was added via the referral process then the program manager will receive an email from ETO advising them of the addition. Otherwise, the KCC Program Manager will need to run a "New Interest Cards" report periodically to see a list of new potential students.

STEP-BY- STEP INSTRUCTIONS

The following instructions are not all-inclusive, meaning the easiest and quickest methods are described rather than all the many options the software has built into it to perform the same tasks.

All of these steps are taken from within the Interest Card program.

Quick Search for New Participant/Enroll Participant

1. Before entering a new participant in Interest Card, use the Quick Search to check for an existing participant record in any program on the site. Select "BC Community Access" from list box simply marked "In".

2. Type a few letters from the first and last names in the first box and click on "Search" (or press the <Enter> key).

Quick Search Results

Matches for: mic fak
Total Participants: 1

Filtered by				
LName FName				
Participant Name	Address1	SSN	DOB	SiteEnrollment
Fake, Mickey	96 Walt Disney Way	XXX-XX-6789	11/18/1928	Currently enrolled in site

100 items per page 1 - 1 of 1 items

10 items per page 1 - 1 of 1 items

3. If the result shows no matching participants found, skip to *Add New Participant* in the next section. If ETO did find your participant, click on the participant's name in the search result. ETO will switch to a read-only demographics page.

View Participant

[Audit Report](#) [Program History](#) [View Mickey Fake's Dash](#)

Status: **Currently Enrolled**

Prefix: **--Select--**

First Name: **Mickey**

4. Click on the "Program History" button at the top of the page to see what programs the participant is enrolled

in. Note: "Currently Enrolled" should indicate the participant is already enrolled in the program you are signed into, but checking Program History will let you be certain).

Program History for Mickey M. Fake

Program				
Community Pre-Enrollment				
Enrollment	Program Start Date	Program End Date	Projected End Date	Days in Program
Currently Enrolled	11/25/2018			129

5. If the participant is already enrolled in Interest Card, skip to *Enter TouchPoint* further down. If they are

not enrolled, select [Participant | Enroll Participants](#) from the Navigation Menu. The *Enroll Participants* search form will open.

Enroll Participants into Interest Card

Search for Participants in BC Community Access by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.

1. Enter search criteria. 2. Select participant(s) to enroll. 3. Enter enrollment information; if multiple participants are selected with different dates, finish on the following page.

Last Name:

First Name:

or

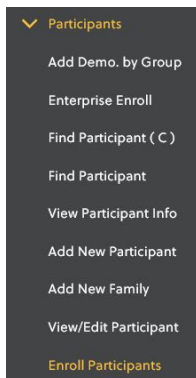
SSN:

or

Case Number:

or

Family Name:



6. Type

part of the first and/or last names (note the names are switched—Last Name first and First Name following) **or** Social Security Number in the appropriate space and click “Search” (or press the <Enter” key).

- Click to select the check box next to the name of the participant or participants you need to enroll. A Program Start Date control will appear.

Below are all Participants who are not currently enrolled in Interest Card with last name like 'fake'.

<input type="checkbox"/>	Participant	Age	Case Number	DOB	SSN
<input type="checkbox"/>	Cherise Fake	24	19819	02/14/1995	
<input type="checkbox"/>	Mickey Fake	90	19489	11/18/1928	XXX-XX-6789
<input type="checkbox"/>	SSG Fake	18	19559	12/11/2000	
<input type="checkbox"/>	Testy Fake	20	19556	01/01/1999	

- Adjust the Program Start Date if the current date is not correct and click the “Enroll Participants” button.

* **Program Start Date:**

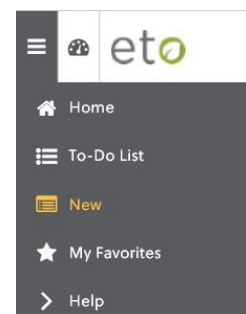
Add New Participant

- Select [New](#) from the top of the Navigation Menu (or the New Tab if using the old UI). ETO will switch to the New Page.

New Participants

- ▶ Add Participant
- ▶ Enroll Participants
- ▶ Add Reliable Contact
- ▶ Add Family
- ▶ Add Drug Record
- ▶ Add Education Record

- Click “Add Participants” in the “New Participants” section of the New Page. The Add New Participants (intake demographics) form will open.



- Complete the form as completely as possible with the available information. Fields and their requirements follow below.

Enroll in Program: This is an off/on check box control, checked by default. Leave this checked

Program Enrollment

Enroll in Program ☒

and proceed to the next field.

Program Start Date: This is a standard date-formatted field and must conform to ETO's date format (*m/d/yyyy*), with a calendar control to help set the desired date. By default, the current date is pre-populated. If a different date is required, type the correct date directly into the box or use the calendar control to select a different date. *This is a required field.*

Program Start Date * 

Prefix: This is an exclusive choice (can select only one) drop-down list box with a pre-selected list of common name prefixes. The list includes "Mr.", "Ms.", "Mrs.", "Dr.", "Hon.", "Rev.", "Sr.", and "Br.". Select an appropriate name prefix from the list, if desired or appropriate. This is an optional field.

Prefix

First Name: This is a free-text field (50 characters) that will accept special characters such as hyphens and apostrophes. Type the participant's First Name. *This is a required field.*

First Name *

Middle Name: This is a free-text field (50 characters) that will accept special characters such as hyphens and apostrophes. Type the participant's Middle Name. This is an optional field.

Middle Name

Last Name: This is a free-text field (50 characters) that will accept special characters such as hyphens and apostrophes. Type the participant's Last Name. *This is a required field.*

Last Name *

Suffix: This is an exclusive choice (can select only one) drop-down list box with a pre-selected list of common name suffixes. The list includes "Jr.", "Sr.", "I", "II", "III", and "IV". Select an appropriate name suffix from the list, if desired or appropriate. This is an optional field.

Suffix

DOB: This is a standard date-formatted field and must conform to ETO's date format (*m/d/yyyy*), with a calendar control to help set the desired date. Type the Date of Birth directly into the field box or use the calendar control to select the correct date. *This is a required field.* ETO will calculate and display the participant's age directly below.

DOB * 

Address 1: This is a free-text field (100 characters—only 75 will display

Address 1 *

properly). Type the participant's street address. Do not include apartment or lot numbers, or the city name. *This is a*

required field. Please see Appendix A at the end of this document for proper formatting of addresses and other data.

See "[Standard Data Formatting for ETO](#)" in Appendix A for the proper way to enter hyphenated names, addresses, and other specific data types.

Address 2: This is a free-text field (100 characters—only 75 will display properly). Type the participant's secondary address information, such as apartment, suite, or lot number, in the box. Do not enter the city name in this box. This is an optional field.

Address 2

Zip Code: This is a number field formatted for 5 and 9 digit zip codes.

Zip Code *

-

Type the correct zip code for the participant's address in the field box. ETO will automatically look up and record the corresponding city, county, and state from the zip code. *Do not enter City and State anywhere else on the form. This is a required field.*

Email: This is a free-text field (50 characters) that validates for an email address. Type the participant's email address, if known, into the text box. This is an optional field.

Email

SSN: This is a number field (9 characters) that validates and masks (adds dashes in the proper place automatically) for a U.S. Social Security Number. Once entered, ETO will display only the last 4 digits visibly, masking the previous 5 digits with a series of 'x' characters. This is an optional field.

SSN

Home Phone: This is a number field (10 characters) that validates and masks (adds parentheses and a dash in the proper place automatically)

Home Phone

for a

phone

number. "Home Phone" is an outdated term, and this field should be thought of primarily as a land-line phone number. This is an optional field.

Cell Phone: This is a number field (10

Which fields to put phone numbers into can be both frustrating and confusing. If the participant has only one phone number, put it in where appropriate if you can tell what kind of phone it is by the number. It is okay to put a cell number in both fields if you want to. If they have two cell numbers put their personal cell in the "Cell Phone" field and the other in "Home Phone".

characters) that validates and masks (adds parentheses and a dash in the proper place automatically) for a phone number. *"Home Phone" is an outdated term and so this field should be thought of primarily as the participant's personal cell-phone number.* This is an optional field.

Cell Phone

WorkPhone: This is a number field (10 characters) that validates and masks (adds parentheses and a dash in the proper place automatically) for a phone number. If known, enter the participant's work phone number. This is an optional field.

WorkPhone

Message Phone: This is a free-text field (100 characters) where you can enter a number and short note for leaving the participant a message if needed. This is an optional field.

Message Phone 

Gender: This is an exclusive choice (can select only one) drop-down list box with a pre-selected list for gender: "Male", "Female", "Unknown or Unreported", "Transgender", and "Other". Select the most appropriate choice for the participant. *This is a required field.*

Gender *

Race: This is an exclusive choice (can select only one) drop-down list box with a pre-selected list for race: "African American", "Asian or Pacific Islander", "Caucasian", "Native American", "Other (including multi-racial) Race", and "Unknown or Unreported Race". Select the most appropriate choice for the participant. *This is a required field.*

Race *

Ethnicity: This is an exclusive choice (can select only one) drop-down list box with a pre-selected list for Caucasian ethnicity: "Hispanic", "Non-Hispanic", and "Unknown or Unreported". Because Hispanic is not classified as a race but data needs to be captured for the group, this field is used to assign this ethnicity to individuals. Select the most appropriate choice for the participant. *This is a required field.*

Ethnicity *

Family Status: This is an exclusive choice (can select only one) drop-down list box with a pre-selected list for the participant's family status: "Divorced", "Living w/ Significant Other", "Married", "Other", "Separated", "Single", "Widowed", and "Unknown". Select the most appropriate choice for the participant. *This is a required field.*

Family Status *

Convicted of a felony: This is a Yes/No field. Click to select the radio button for the appropriate choice. This is an optional field, so a “Clear Selection” button is available if you make an inappropriate selection and need to undo the selection.

Convicted of a felony ?

☐ Yes/True

☐ No/False

Clear Selection

Do any of the following apply: This is a non-exclusive choice (can select more than one) list of choices for the participant’s probation/parole status: “Probation”, “Parole”, and “Re-Entry”. Click to select the check box for all that apply. This is an optional field.

Do any of the following apply

☐ Probation

☐ Parole

☐ Re-Entry

Referral Entity: This is an exclusive choice (can select only one) option box tied to the Entities table and showing those entities assigned as a referral type. Select the appropriate choice if available. This is an optional field. *Note: The “Interest Card” TouchPoint asks the question matching the “How did you hear about us?” portion of the physical interest card, so this demographic question can be skipped if an appropriate selection is not available.*

Referral Entity ?

--Select--

Alert: This is a free-text field (large capacity, more than 200 characters, but only 75 characters display). Type an alert message with important information about the participant that others may need to know. This alert will flash in a modal pop-up window whenever anyone views the participant’s information, and can sometimes be seen on the participant’s dashboard. Things like warnings, important data that needs to be collected, or follow-up questions and information can be included. *Routine information should not be entered in this field.* This is an optional field.

Alert

Military Status: This is an exclusive choice (can select only one) drop-down list box with a pre-selected list for the participant’s military status: “Active Duty”, “Never Served”, “Spouse of Active Duty Member”, “Spouse of Veteran”, and “Veteran”. Select the appropriate choice, if known. This is an optional field.

Military Status

--Select--

4. Click “Save” at the bottom of the form to complete the entry.
5. Use the Referral process to enroll the participant into Community Pre-Enrollment.

Referral to Community Pre-Enrollment

1. Select Referrals | Add Referral from the Navigation Menu. The Add Referral form will open.
2. Enter part of the participant's name in the filter box at the top of the

Add Referral

Select Participants Referral Form Provider Search Confirmation

Select Referral Form: Participant Referrals

Next

Participants

☐ Include Dismissed Participants

Page size: 50 Page 1 of 11, rows 1 to 50 of 542

	Name	Address1	SSN	DOB
1	<input type="checkbox"/> Abbott, George	32 Inn Road	000000865	9/28/1987
2	<input type="checkbox"/> Adams, Keaton	9 Harrison	000007640	1/8/1992
3	<input type="checkbox"/> Aikens, Joshua	23 Oakhill Dr.		5/27/1984
4	<input type="checkbox"/> Akins, Kimberly	54 Springview Drive Apt 302	000008632	4/5/1974

displayed list and press the <Enter> key, or navigate through the list of choices to find the new participant.

3. Click to select the check box next to the new participant's name and click on the "Next" button at the top or the bottom of the page. The Referral form will open.

4. Click to select the box for "Other Program" under Referral Type: *This is a required field.*

Referral Type: *

☐ Outside Agency

☐ Other Program

Reason for Referral: *

Other

5. Select "Other" from the Reason for Referral: list box. *This is a required field.*

6. Type the same date used for adding the new participant (current date by default) into the Referral Date: field or use the calendar control to select the date. *This is a required field.*

Referral Date: *

Referral Notes: *

7. Type a quick comment in the Referral Notes: field. *This is a required field.*

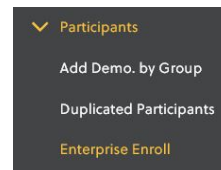
8. Click the "Next" button. The Provider Search page will open.

<input type="checkbox"/> Refer	Provider	Type
	<input type="text" value="pre-en"/>	
<input type="checkbox"/>	Community Pre-Enrollment	Program
<input type="checkbox"/>	FFT Pre-Enrollment	Program

9. Enter part of the program name ("pre-en") in the Provider filter box at the top of the provider list and press the <Enter> key.
10. Click to select the check box next to "Community Pre-Enrollment"
11. Click the "Next" button at the top. The Confirmation page will open.
12. Click the "Confirm" button.

Enterprise Enroll

1. Select Participants | Enterprise Enroll from the Navigation Menu. The "Enroll a Participant in Interest Card" search form will open.



Enroll a Participant in Community Pre-Enrollment

Search for a participant or family to enroll based on your search settings
Participant search will return results based on: Full name, SSN

Only one field will be used to search at any given time.

Participant Search

2. Enter a few letters from the first and/or last names in the Participant Search box and press the <Enter> key. ETO will display a list of participants matching the criteria you entered.

3. If using this feature to search the enterprise for participants on the **Goodwill Central Michigan Heartland** site, this should be as far as you need to go. Look to confirm if the participant does or does not currently exist on the enterprise and skip ahead to the appropriate place. If using the feature to actually bring a participant over, continue with step 4.

4. Click to select the check box next to the participant, or participants, you need to enroll. The Program Start Date control will appear as soon as one name is checked.

<input type="checkbox"/>	Name	DOB
<input type="checkbox"/>	Michey Fake	
<input checked="" type="checkbox"/>	Mickey M Fake	
<input type="checkbox"/>	Mickey M. Fake	11/18/1928

* Program Start Date:

5. If one participant is all you need to enroll, confirm or change the date and click the "Enroll Participant" button. A success modal window will pop up. Click OK and skip ahead to *Interest Card TouchPoint* in the next section.

<input type="checkbox"/>	Name	DOB
<input type="checkbox"/>	Michey Fake	
<input checked="" type="checkbox"/>	Mickey M Fake	
<input checked="" type="checkbox"/>	Mickey M. Fake	11/18/1928

☐ Enroll Selected Participants with Different Program Start Dates
☐ Enroll Selected Participants with Same Program Start Dates

6. If more than one participant is selected, an option control for using the same or different dates will appear. Click to select the radio button for the best option and click the "Continue" button.

7. If selecting the "different dates" option, a new form will appear with the participants listed on the left with date controls for each to the

Search for a participant or family to enroll based on your search settings
Participant search will return results based on: Full name, SSN

Participant Name	Start Date
Michey Fake	4/1/2019
Mickey M. Fake	4/1/2019

Back to Search

Enroll Participants

right. Set the correct dates for each participant and click the "Enroll Participants" button. If selecting "same dates" option, skip to step 8, below. The "Back to

Search" button will take you back to the previous step as if you had not clicked the "Continue" button there.

8. If selecting the "same dates" option, a new form will appear with the participants listed on the right and a single Program Start Date on the left. Set the correct date, if different from the current date, and click the

Program Start Date:	Participants
4/1/2019	Mickey M. Fake
	Mickey M. Fake

Back to Search

Enroll Participants

"Enroll Participants" button. A success modal message will pop up to confirm the action. The "Back to Search" button will take you back to the previous step as if you had not clicked the "Continue" button there.

9. Click OK to confirm.

Success

Participants were successfully enrolled!

OK

Interest Card TouchPoint

1. Enter a few letters from each name in the Quick Search bar at the top of the ETO screen and press <Enter> (or click on "Search"). ETO will display a list of participants that match the criteria you entered.

SEARCH

Participant Name	Address1
Fake, Pluto	92 Cliff St

View / Edit

View / Record TouchPoint

Program History

Dismiss from program

MORE

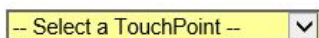
CLOSE

2. Click the name of the participant you are working with. A fly-out menu should appear. Select "View / Record TouchPoint". The participant's Review TouchPoints screen will appear.

3. Click the “Take New TouchPoint” button. A Select TouchPoint list box will appear.

4. Select “Interest Card” from the list box. The

Select TouchPoint:



“Interest Card” TouchPoint will open.

This TouchPoint should **only** be available from within the Interest Card program.

5. All answers but the first one and the last three should pre-populate from the intake demographics data but are still described below. Pre-populated field names will appear on the form in blue and the data cannot be changed in the TouchPoint. If any of this data needs to be corrected, go to the participant’s View/Edit page to make these changes.

Date Taken: (At the top of the form) This is a standard date formatted field and must conform to ETO’s date format (*m/d/yyyy*), with a calendar control to help set the desired date.

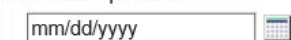
By default, the date box is blank. Type the correct date directly into the box

or use the calendar control to select a date. This should match the date the physical card was completed. *This is a required field.*



Date Completed: This is a standard date formatted field and must conform to ETO’s date format (*m/d/yyyy*), with a calendar control to help set the desired date. By default, the date box is blank. Type the correct date directly into the box or use the calendar control to select a different date. This should match the date the physical card was completed. This is an optional field.

Date Completed:



First Name: This field is pre-populated from demographic data—participant’s first name—and cannot be changed.

First Name

Pluto

Last Name: This field is pre-populated from demographic data—participant’s last name—and cannot be changed.

Last Name

Fake

Address

92 Cliff St

Address: This field is pre-populated from demographic data—participant’s street address—and cannot be changed.

Apt/Lot/Suite: This field is pre-populated from demographic data—participant’s apartment, lot, or

Apt/Lot/Suite

suite number—and cannot be changed.

Zip Code
49014

Zip Code: This field is pre-populated from demographic data—participant’s zip code—and cannot be changed.

Home Phone: This field is pre-populated from demographic data—participant’s Home, or primary landline, phone number—and cannot be changed.

Home Phone

Cell Phone
(269) 224-6758

Cell Phone: This field is pre-populated from demographic data—participant’s cell phone number—and cannot be changed.

E-Mail: This field is pre-populated from demographic data—participant’s email address—and cannot be changed.

E-Mail
000w@nomail.com

DOB
6/7/1958

DOB: This field is pre-populated from demographic data—participant’s date of birth—and cannot be changed.

Age
60

Age: This field is pre-populated from demographic data—participant’s age as calculated by ETO—and cannot be changed.

Race: This field is pre-populated from demographic data—participant’s race—and cannot be changed.

Race
Unknown or Unreported Race

How did you hear about us?: This is a non-exclusive choice (can select more than one) option box listing the same answers appearing on the physical card: “Newspaper Ad”, “Flyer”, “Friend”, “KCC Career Coach”, “Michigan WORKS!”, “Michigan WORKS! Hub”, “Goodwill”, “Community Agency/Organization”, and “Other”. Click to select the checkbox next to any and all answers as given by the participant. This is an optional field, though it is the primary reason this TouchPoint is being completed. This is also a conditional question and selecting “Community Agency/Organization” will cause a new question to appear: “List Community Agency/Organization”. Selecting “Other” will cause another new question to appear: “List “Other” referral source”.

How did you hear about us?

- ☐ Newspaper Ad
- ☐ Flyer
- ☐ Friend
- ☐ KCC Career Coach
- ☐ Michigan WORKS!
- ☐ Michigan WORKS! Hub
- ☐ Goodwill
- ☐ Community Agency/Organization
- ☐ Other

List Community Agency/Organization: This is a free-text field (55 characters) that appears only when “Community Agency/Organization” is selected in the previous question: “How did you hear about us?”. Type whatever the participant wrote on the card into the text box. This is an optional field.

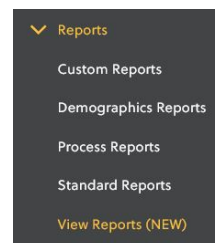
List Community Agency/Organization

List “Other” referral source: This is a free-text field (55 characters) that appears only when “Other” is selected in the previous question: “How did you hear about us?”. Type whatever the participant wrote on the card into the text box. This is an optional field.

6. Click the “Save” button to complete the record.

Run “New Interest Cards” Report (for KCC Personnel)

1. Select Reports | View Reports (New) from the Navigation Menu.



2. Click the tiny expand button next to the category “BC Community Database” to expand the list of available reports.



3. Locate and click on the report title “New Interest Cards”. If the report is not in the list, click the “Refresh Report List” button in the upper left corner of the page and try again.

4. When the report window opens enter the date range for the Program Start Date where prompted.

The last used dates will pre-populate by default.

Appendix A

ETO Data Entry Standards

Capitalization:

Do not use caps lock, use lower case where appropriate.

Capitalize proper nouns, compass points (N, S, E, W, NW, SE, etc).

Period Usage

Use periods only in narrative fields to complete sentences. Do not use periods to close abbreviations.

Hyphenated Names

Do not leave a space before or after a hyphen in any hyphenated name.

Address Formatting

Always use standard address format.

Enter only the street address of the building or mobile home park in the Address 1 field.

Apartment, lot, suite numbers, etc. belong in the Address 2 field.

Do not enter city or state in either address field. ETO will automatically determine the City, County, and State from the Zip Code.

Do not spell out compass directions. Use standard abbreviations.

Place compass directions before the street name, not after. Although it is correct and proper to place it after Avenue, in the interests of consistency it should always be placed before the name in ETO. The one exception to this will be Capital Ave NW and SW in Battle Creek, because of the iconic nature of that street.

Do not spell out street types, use standard abbreviations (see appendix A). One exception to this is the Springfield Avenues (Avenue A, Avenue B, etc.); in this case the word should be spelled out.

Do not use periods after street type abbreviations or compass directions.

Use the abbreviation for apartment, suite, or the word lot whenever possible, but a pound sign (#) can be used when uncertain. The term “flat” is not used in this part of the country.

Use street types when possible, though in Battle Creek they are not necessary for more than two or three streets (Taft St and Taft Ct, for example).

Examples:

123 Main St

Apt 4B

1145 Harmonia Rd

Lot 145

15 Capital Ave NE

Ste 2

Appendix A

Standard	Abbreviation	Alternate
Avenue	Ave	
Apartment	Apt	
Boulevard	Blvd	
Drive	Dr	
Lane	Ln	
Parkway	Pkwy	Pky
Place	Pl	
Road	Rd	
Street	St	
Suite	Ste	Suite

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