

**On-Boarding Process  
Morgan Crafts**

**A new agency or section of an agency (for example, STR or SPF-RX ) will ask to go through an on-boarding process into the ECCO System.**

Information to ask
<p style="text-align: center;"><b>Step 1</b></p> <p>Is this a brand-new agency with new users coming onto the system? Who will need to go through the self-sign up process?</p>
<p style="text-align: center;"><b>Step 2</b></p> <p>Are there any existing providers in the system already?</p>
<p style="text-align: center;"><b>Step 3</b></p> <p>Is this a sub agency, (str-agency) and providers will only need to be assigned to their current agency and this new sub agency?</p>
<p style="text-align: center;"><b>Note</b></p> <p>From past experience, some providers may think they need a new account for their new sub agency (example, str) or already have an account in the system. Please make it aware that if they have an account already they will not need to sign up again, and the new sub agency will be assigned to their account.</p>

<b>Taking note of who needs to create an account, and who is already in the system</b>
<b>Step 1</b> Find out if this will be a brand-new agency with new users or If this will be a sub agency that will have either a mix of new and existing providers, or only existing providers.
<b>Step 2</b> Make two lists: New users who need accounts, and existing users
<b>Step 3</b> Send out emails to new users asking to go through the self-sign up process; provide temp passwords. “Get a user account on ecco. If you already have an account on ecco, you do not need another. If you don't not have an Ecco account, please use this link to do a self-sign up process. <a href="http://ecco.ga-sps.org/signup.php">http://ecco.ga-sps.org/signup.php</a> . Please select statewide option in the regional drop down, then your listed agency.”
<b>Step 4</b> Email everyone to let them know the new agency or sub agency is created, and once everyone is on the system we can proceed with assigning everyone to the agency.

<b>Overview of The System</b>
<p style="text-align: center;"><b>Step 1</b></p> <p>Once everyone is assigned, find a time where everyone can be present for an ECCO Overview.</p>
<p style="text-align: center;"><b>Step 2</b></p> <p>Before overview, email out ECCO manual and videos.</p> <p>“Review the following videos:”  <a href="http://resources.ga-sps.org/resources/ecco-users-manual">http://resources.ga-sps.org/resources/ecco-users-manual</a>  <a href="http://resources.ga-sps.org/resources/ecco-overview-using-brifecase">http://resources.ga-sps.org/resources/ecco-overview-using-brifecase</a>  <a href="http://resources.ga-sps.org/resources/ecco-overview-adding-an-intervention-profile">http://resources.ga-sps.org/resources/ecco-overview-adding-an-intervention-profile</a>  <a href="http://resources.ga-sps.org/resources/ecco-overview-ta-entry-and-updates">http://resources.ga-sps.org/resources/ecco-overview-ta-entry-and-updates</a></p>
<p style="text-align: center;"><b>Step 3</b></p> <p>Schedule an overview of the system for all providers even if they are existing.</p>
<p style="text-align: center;"><b>Step 4</b></p> <p>Run through of all basic functions of ECCO with emphasis on Plan and Report and MDS data.</p> <p style="text-align: center;">Ecco IP Building:</p> <p>“After your IP has been approved and finalized you will build your IP electronically on Ecco. We will provide a tool and a web meeting on the 25th to assist with this task.”</p> <p style="text-align: center;">Entering MDS data:</p> <p>“A very important part our prevention work is communicating our process data to SAMSHA. This enables our federal funders to see our progress and who is being served in communities. In the recent past this was done on the MDS platform, recently we are transitioning to using Ecco to gather and report these data. All prevention contacts in the state of GA will be required to report data into ecco. We will cover this process in our web meeting on the 25th.”</p>

“After IPs have been approved, our team will provide training on building the IPs on Ecco. The link below lists the questions that will be asked base on the strategy type.”

.” Providers will Build IPs on Ecco”