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Program Flow Overview

The following user manual will guide case managers through the basic program flow for the EmployIndy YES program. It highlights the different phases youth pass through and identifies the corresponding screens in ETO that are utilized for each phase and activity.

Below is an overview of the basic program flow.

The basic flow has 4 distinct phases:

1. Enrollment & Assessment
2. Pre-Placement Services
3. Placement
4. Two Year Retention & Supportive Services

For each phase the manual provides the various activities, services, actions and tasks available to staff to guide youth through the program. Each Phase starts a new section in the manual that provides details on the required tasks and usage of the ETO YES Build. The manual highlights the ETO screens used for each phase.

The diagram on page 4 provides specifics for each phase with additional details on the items addressed at each phase.
ETO – OVERVIEW – SCREEN & DASHBOARD

Searching for Participants

Once a participant has been enrolled they will be searchable and searches can be conducted from either the “Quick Search” or “My Dashboard” sections.

Program you are working in (YES)
Your information will display here
Defaults to “My Dashboard”

Searching for participants in either place will yield the same results
Case Number will automatically be generated for the client
ETO – Participant’s Dashboard

Choose a participant and click on their name (note: all underlined sections in ETO are hyperlinks). This will display their Dashboard.

ETO – Systems Icon Overview

NOTE: Touchpoint = Efforts to Outcomes Data Collection Form

All expandable section must be filled out as presented/required. The sequence of services should be followed as laid out starting with the Client History – 14 youth elements – test scores – YES Master Goal followed by the right-hand screen of Services, vouchers, and placements.

Add a new “Touchpoint” or activity

View the details of the “Touchpoint” or activity

Edit/Update the “Touchpoint” or activity

Add a similar “Touchpoint” or activity

Delete the “Touchpoint” or activity
ENROLLMENT / ASSESSMENT PHASE

The Enrollment/Assessment Phase includes the “Add new Participant” section which along with completing the pre-application fields and the Full YES Application is part of the enrollment process. The Assessment includes several steps and screens including the YES 14 Element Assessment, TABE Assessments, and the ISS creation. Each will be detailed further in the following sections of this guide.

ETO - Add Participant

Choose “Add New Participant” and click go

Program Enrollment and count in Reporting is signified by checking “Enroll in Program”. This is automatically checked, if unchecked by the user the client will no longer be enrolled in the program.

All items with *Asterisks are mandatory fields and must be filled out.
ETO – YES Pre-Application Required Demographics

**YES Pre-Application Required Demographics**

- **First Name**: 
- **Middle Name**: 
- **Last Name**: 
- **Suffix**:  
- **Address 1**: 
- **Address 2**: 
- **Zip Code**:  
- **Cell Phone**:  
- **Home Phone**:  
- **Email**: 
- **DOB**:  
- **FFT-Gender**:  
- **How did you hear about this program?**: 
- **Who Referred You to Program**: 

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ETO - YES Enrollment Required Demographics

YES Enrollment Required Demographics

SSN

FTT-Race

FTT-Ethnicity

Citizenship

Able to work in U.S.

Selective Services Registration Number

Selective Services Registration Date

FTT-For the 12 mos, your Gross Household Income

FTT-How many in household (include yourself)?

Emergency Contact Name

Emergency Contact Number

Emergency Contact Relationship

YES Barriers

Basic Skills Deficient
Currently or has been involved with the juvenile or adult justice systems
Disability
English Language Learner
High school dropout or not currently attending school
Homeless or Runaway
Low income
Low Levels of Literacy
No Family Support
Pregnant/Parenting
Substance Abuse
Transportation
Youth in, or aged out of Foster Care

YES Barrier - Other

Case Number

FFT = Family Financial Tracking (This is part of CWF)
Click the plus sign “+” to expand section options

Click “New” to add a new Client History

NOTE: Upon clicking “New” you will see the list of touchpoints below:

Select a touchpoint from the drop down to add to the participant’s file
Multiple offenses can be added to the participant’s file by clicking “Save and Record Similar”. If the client only has one record to be added, click “Save” (Note: this is an optional screen).
**ETO – Client History (Ed/ Emp/ Crim Hist)**

**YES Education History**

<table>
<thead>
<tr>
<th><strong>Education History</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you currently enrolled in an alternative school?</td>
</tr>
<tr>
<td>○ Yes</td>
</tr>
<tr>
<td>○ No</td>
</tr>
<tr>
<td>Clear Selection</td>
</tr>
</tbody>
</table>

**Highest School Grade Completed:**
- Select -

**Highest education level completed:**
- Select -

**Last school attended?**
Use “%” at the beginning of search. E.g. %s

**Other - Last school attended?**

**GED Documentation Upload**
- Select |

**High School Diploma Upload**
- Select |

**College/Post-Secondary Credential Upload**
- Select |

- Select |

The “Last School attended” field will search a database of existing schools in Indianapolis. Select one from the list, to search the database, using an “%” at the beginning of the search. For example, “%southern”

To attach a file, the file must be saved on your computer or a drive you can access. Click “Select” to find the file and select it for upload, similar to adding an attachment to an email.
ETO – Client History (Ed/ Emp/ Crim Hist)

YES Employment History

Employment History is entered as a two-step process. First select the “Status of Employment”, then click “Next Page” to go to the work history screen.

![Employment History Screen]

Selections made in this section will inform the next steps of data collection.

Enter work history of client in chronological order starting with most recent employer.

Current/Most Recent Employer

Employer Name: *

Job Title: *

SOC Code: 
Use “%” at beginning of search text. (E.g. %manager)

Start Date: mm/dd/yyyy

End Date: mm/dd/yyyy

Hourly Wage: $

Employer 2

The SOC Code is selected from an existing database, to find the SOC code that fits the work history record, search the database by adding a “%” at the beginning of the search text.

Up to 5 employers can be added to the participant’s work history on one screen.
Click the plus sign “+” to expand the options and see most recently recorded touchpoints.

Click “New” to add a new 14 Elements Need Assessment.
The YES User Guide is located on the page below of the Intranet for your review: https://www.yesnetworkindy.org/yes-program.html
ETO – Dismiss a Client

Navigate to the “My Dashboard” for the client then to the Action links and select Dismiss Participants.

Enter the Program End Date and select the appropriate Dismissal Reason. Note: Program End Dates are required to dismiss a client, but Dismissal Reasons are not.

ETO – Re-enroll a Client

Open the navigation tool bar in the right-hand side of the screen and expand the Participants section. Click on “Enroll Participants”
Search for your client by **Last Name, First Name, Case Number, or SSN.** Check the box next to the name of the client to be re-enrolled.

Once the checkbox is selected, enter the new Program Start Date. Note: This program start date does not replace any prior program start dates.

Client’s program history can be viewed by selecting the Program History button on a client’s View/Edit Participant screen.
ETO – Test Scores

TABE assessments are part of the initial YES enrollment and assessment phase. The Pre-test TABE and Post-test TABE as well as GED Incentives HSED Pre-test scores can all be entered via the “Test Scores” Touchpoint.

TABE scores previously entered on the Application screen in the legacy IPIC YES system will appear in this section along with any GED Incentive scores.

Click the plus sign “+” to expand options

Click “New” to add a new Test Scores

Note: Test score fields allow decimal points up to 2 places. Upon Test type selection “Math” will display as “Total Math”.

[Diagram of the Touchpoint showing participant information and test scores with annotations for instructions]

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ETO – ISS Development

The ISS is developed in several distinct screens in ETO. The printed ISS will pull in information from these various screens. Much of the ISS is driven by the overall Career Objective/goal which is entered from the YES Master Goal Touchpoint. Please refer back to the YES User guide for programmatic guidance related to ISS Development and Individual Service Strategies.

ETO – YES Master Goal

Click the plus sign “+” to expand the options

Click “New” to add a new Master Goal

After the Master Goal has been created, the client can digitally sign it by using the mouse or touchpad. Note: If a client chooses to sign a hard copy or client is not present to sign case manager should sign and have client sign at next meeting. The signed document should then be uploaded and clearly labeled in the system.
The creation of the ISS marks the end of the Enrollment/Assessment Phase. At this point the youth has been fully enrolled, assessed and an Individual Service Strategy has been developed. Services now can move into the next Phase: “Pre-Placement Services.”

**PRE-PLACEMENT SERVICES PHASE**

The Pre-Placement Services phase allows the offering/enrollment into activities pertaining to the 14 program elements, which include two contract outcomes, “Job Readiness” and “Paid/Unpaid Work Experience.” This phase also starts the ability of staff to create vouchers on client’s behalf and record “Obtained HSE” which is another contract outcome.

**ETO – YES Services**

The YES program outlines the 14 elements that are useful in preparing youth for long term job placement or post-secondary education placement. Below are the 14 program elements the service provider offers themselves or have MOUs created with other providers to offer.

<table>
<thead>
<tr>
<th>Pre-Placement Services YES 14 Program Elements (SERVICE)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>14 Elements</strong></td>
</tr>
<tr>
<td>1. Tutoring</td>
</tr>
<tr>
<td>2. Adult Ed Services</td>
</tr>
<tr>
<td>3. Paid/Unpaid Work Exp</td>
</tr>
<tr>
<td>4. Industry Training</td>
</tr>
<tr>
<td>5. Job Readiness</td>
</tr>
<tr>
<td>6. Leadership Development</td>
</tr>
<tr>
<td>7. Supportive Services</td>
</tr>
<tr>
<td>8. Adult Mentoring</td>
</tr>
<tr>
<td>9. Follow-up Services</td>
</tr>
<tr>
<td>10. Counseling</td>
</tr>
<tr>
<td>11. Financial Literacy</td>
</tr>
<tr>
<td>12. Entrepreneurial Skills Training</td>
</tr>
<tr>
<td>13. Job &amp; Career Information</td>
</tr>
<tr>
<td>14. Postsecondary Preparation Training</td>
</tr>
</tbody>
</table>

These are the 14 Program Elements. See your YES Program Manual for definition of each element, and the required components for each.

Two Elements: “Paid/Unpaid Work Exp” and “Job Readiness” are service provider deliverables per the yearly contract outcome goals. Proper recording of the start and finish of these elements are required for performance measures.

“Follow-up Services” are part of the 14 elements but are not offered at this Phase. These can be offered AFTER the Placement Phase.
Click the plus sign “+” to expand the options

Click “New” to add a new Services

Job Readiness has been added to the YES Services Area and clients with an Actual Completion Date are counted towards the Job Readiness KPI.

For services referred to a different provider, please select a provider from the provider drop down list. If the service was not a referral, this field will be hidden.

New providers can be entered by selecting “Add New Provider” button. Upon entering the provider information be sure to select the entity type “YES Service Provider”
ETO – Vouchers

Click the plus sign “+” to expand the options

Click “New” to add a new Vouchers

The Voucher Information screen contains conditional logic whereby the next available fields are dependent on answers selected.
If “Client” is selected in the “Voucher Issued To:” field, the client information will automatically populate.

Whereas if “Vendor” is selected in the “Voucher Issued To:” field, the system will allow you to choose a vendor from the database.

Previous “Utilities and Housing Assistance” is now split as: Housing Assistance = “Temporary housing/Shelter” and Utilities = “Emergency Assistance”. Additionally, the HSE Incentive has been added under the ISS Milestone.

When entering the cost information for the voucher, the system will automatically calculate the amount requested on the voucher based on subtracting the amount of funds from other sources from the total cost of the service.
ETO – Obtained HSE (Contract Outcome)

The user can digitally sign the voucher using a mouse or touchpad.

If a receipt is available, it should be uploaded in the “Receipt Upload” field.

Click the plus sign “+” to expand the options.

Click “New” to add a new Education/Training Placements.
Youth needing to obtain a High School diploma prior to obtaining long-term job placement and/or long term post-secondary education placement, should be recorded in the Education/ Training Placements Touchpoint.

Below is a demonstration of how to record the start/placement date for the training prep and the type of Education/Training Placement Level.

Choose an Educational Institution from an existing database or add a new educational institution if needed.

Youth accomplishing their placement Objective/Goal marks the completion of the Placement/Outcomes Phase including youth obtaining their long-term job placement or post-secondary education placement.
PLACEMENT PHASE

The Placement Phase begins with the youth being placed into their long-term job placement or their post-secondary education placement. During this time vouchers can still be created on behalf of the youth.

ETO – Employment Placement

The Job Placement in the “Employment Placements” section is the long-term position that will start the two-year follow-up and retention services. It is not a “maintenance job” that a youth might get while working on their GED. This Job Placement is for the long-term job identified in the youth’s ISS.
The Employer Name field provides choices from a database of employers.

The SOC Code field provides choices from an existing database of SOC Codes. Note: O*Net online provides an option to enter job titles and will provide SOC codes based on closest match. These can be entered in this section to ensure best job title information.
**ETO – Post-Secondary Education Placement**

The primary objective of the YES program is to assist youth to obtain a job or enroll into post-secondary education placement and maintain those over the course of two years. The “Education/Training Placement” Touchpoint is used to record this contract outcome.

Only Education Placements of Vocational Training, Associates, Bachelors, Masters or Doctoral Degree will be counted as “Post-Secondary Education Placement”.

---

**Document Upload Type:**

-- Select --

**Documentation Upload:**

Select

**Last Retention Date:**

mm/dd/yyyy

**Last Retention Type:**

-- Select --
Upon youth achievement of job placement or post-secondary Education placement, they are moved to the next phase. The two-year retention monitoring begins upon Placement. Staff are encouraged to offer Retention/ Supportive Services to assist youth in maintaining the placement. During this phase staff can continue to create vouchers on behalf of youth, offer YES 14 Program Elements services/activities, record degree or certificates obtained and record retention.

Recording of the YES 14 Program Elements/ Services was previously covered along with obtaining an HSE or an Advanced Certificate.

The Key element at this phase are Retention check-ins to insure obtaining credit for contract outcomes of the placements.
ETO – Education Retention – Update Existing

To record education retention, navigate to the existing Education/Training placement and click on the hyperlinked placement.

Selecting the existing placement will take you to the Education and Training Dashboard (Pictured Below)

Click “New” under Retention Details to add a retention touchpoint
Enter in the retention details, upload documentation, and save.
ETO – Employment Retention – Update Existing

To record employment retention, go to the existing Education/Training placement and click on the hyperlinked placement.

Selecting the existing placement will take you to the Employment Placement Dashboard (next page)
Employment Retention is a two-part process. On the first page, enter the verification date and upload any documentation, then proceed to the next page.

Click “New” under Retention Details to add a retention touchpoint.
Complete all Employment information available and click “Save” to record the retention.
Contact Information

Thank you for reviewing the YES ETO System Training Manual. If you have any further questions or comments please contact:

Olga Volokhova - ovolokhova@employindy.org
Rodney T. Francis - rfrancis@employindy.org
Caitlyn Potter – cpotter@employindy.org
Reference 1: Internet Explorer Settings for ETO

How to Add Trusted Sites to Internet Explorer

Answer Reports in ETO require either the Crystal Viewer or Java. For both report types, you will need to make sure you have your trusted site settings set for ETO software in order to properly view your reports.

- In your Internet Explorer browser, click on Tools (represented by a gear symbol).
- Select "Internet Options."
- Click on the "Security" tab at the top of the window that pops up.
- Click on "Trusted Sites" (located below the green check mark.)
- Click "Sites."
- In the white box below the words "Add this website to the zone:" type in the following websites, clicking the "Add" button between each site entered:
  - https://*.etoreports.com
  - https://*.etoreports2.com
  - https://*.etosoftware.com
- Click the "Close" button.
- Click the "OK" button.
- Close all open Internet Explorer windows and then re-open Internet Explorer.

Compatibility View

Compatibility view is a browser setting that allows your version of Internet Explorer to act like an older version of Internet Explorer. ETO works best outside of compatibility mode, and in versions 9, 10 and 11 of Internet Explorer. A telltale sign your browser is in compatibility mode is to check the row of links on the top right corner of your ETO screen. If the “Help” link is not lined up with your name and Home Page, you’re in compatibility view.

To remove Compatibility Mode from your browser:

- Click on Tools in your Internet Explorer menu.
- Select Compatibility View Settings.
- Make sure etosoftware.com is not included in this list.
- If it is, click on etosoftware.com so that it is highlighted.
- Click Remove.
- Please note, if you use our legacy crystal reports, you will want to include etoreports.com and etoreports2.com on the list of sites to view in compatibility view.
- Click Close.

Note: at this point you may automatically get logged out of ETO. Log back in and you will no longer be in compatibility view.

Clear Browser Cache

ETO works best when your IE browser is set to “check for newer versions of stored pages” as often as possible and when the cache is cleared each time the browser is closed. Below are instructions to make those changes in your browser:

- Click on the Tools menu in Internet Explorer or the gear icon.
- Select Internet Options.
• In the General tab, in the Browsing History section, click the Settings button. This will open an additional window.
• Under "Check for newer versions of stored pages" select the option to "Every time I visit the webpage."
• Click OK.
• Click the Delete button next to Settings and Delete Temporary Internet Files.
• Check the box to “Delete browsing history on exit.”
• Click OK to close the Internet Options window and close all open Internet Explorer windows on your desktop.
• Open a new Internet Explorer window and log back into ETO with a fresh session.

Other Internet Settings
• Click tools (gear in top right corner)
• Click Internet options
• Go to the Privacy tab
  o Turn off Pop-up blocker and click Apply
• Go to the Content tab
  o Click on Settings under the AutoComplete header
  o Unselect all
  o Click OK and click Apply
• Go to the Advanced Tab
  o Scroll down to Browsing
    ▪ Deselect “use smooth scrolling” (should be at the end of the list)
  o Scroll down to Security
    ▪ Make sure SSL 3.0 is selected
    ▪ Make sure TLS 1.1 is selected
    ▪ Make sure TLS 1.2 is selected
    ▪ Deselect TLS 1.0
  o Click Apply
  o Click OK

Turning off the SmartScreen Filter
The SmartScreen Filter is a security feature in Internet Explorer that gives a warning when certain webpages are being accessed. Unfortunately, this filter can keep some features in ETO from working.
To turn off SmartScreen Filter:
• In Internet Explorer, go to Tools on the menu bar.
• Hover over the SmartScreen Filter option (sometimes called "Windows Defender SmartScreen Filter") so the SmartScreen sub-menu appears.
• Click "Turn off SmartScreen Filter"
• A pop-up window will appear that asks if you would like the SmartScreen Filter on or off. Click the button next to "Turn off SmartScreen Filter" and press OK
Once this is done, the SmartScreen Filter will no longer keep certain features in ETO from working.