ETO Implementation Checklist

1. **What technology will be needed for ETO?**
    a. A PC with Internet Connection
        i. Internet Explorer (version 8 preferred)
    b. ETO does not work with the Web browser "Safari" in a MAC
    c. VOCA funding can be used to support the purchase of a PC and pay for internet connection if needed.

2. **What is ETO Impact vs. ETO Community?**
    a. **ETO Impact**
        i. This is the optional component of ETO that agencies can choose to use. ETO Impact is basically a Client/Data Management System. In the most fundamental description, you enter a victim's information (demographics) into ETO Impact upon intake and then document every interaction (service provided, time spent providing the service, etc) you have with them throughout their duration with your agency.
        ii. ETO Impact will also allow agencies to track Public Presentations, Community Wide Events, Media Contact, and Referrals made.

    b. **ETO Community**
        i. This is the component of ETO that <u>EVERY</u> VOCA funded agency must use! This is where you will enter your annual VOCA reports (and PCAR and PCADV reports if you receive funding from them as well) and submit all of the data from the Empowerment and Satisfaction Questionnaires.

3. **Who will be using ETO Impact in my agency?**
    a. Agencies will have to self identify which staff members will be given user accounts to access ETO Impact.
        i. A User Account is a unique log-in that is provided to the user. It will allow access to specific features and programs in ETO.
        ii. It's recommended that users who enter data each have a User Account so that staff are accountable for their data and program managers can supervise them through ETO.

    b. Each agency will be given **<u>5</u>** user accounts at no charge for the first 2 years.
        i. Any additional user accounts needed will cost $117.27 per user account per year.

ii. Agencies only using ETO Community and NOT ETO Impact will only be given **2** user accounts.

c. An agency can choose to identify only core staff members to have user accounts.
   i. In this scenario, those core staff members will be responsible for all data entry of all employees into ETO.

d. Agencies using more than the allotted User Accounts will be billed directly by Social Solutions for the additional User Accounts.

4. How do I register staff for User Accounts?

a. Each agency will have to identify a Site Manager.
   i. Maintains the agency's site
   ii. Sets up User Accounts
   iii. Determines Program Access

b. Under the Site Manager, User Accounts are set up under with one of the following roles:
   i. Site Manager
      1. Maintains your ETO Impact site
   ii. Department Head
      1. Builds queries
   iii. Program Manager
      1. Oversees staff work in ETO
   iv. Staff
      1. Access to data entry only
   v. Survey Taker
      1. Enters survey responses (ESQ-LF) but does not have access to actual client demographics or points of service information.

5. Will I be able to migrate data from my current case management system?

a. Yes. Agencies will be provided assistance with data migration.

b. The first step will be for agencies to identify what data they want to migrate.
   i. Only data that can be captured into ETO Impact will be able to be migrated.

c. Agencies will also have to determine how many years worth of data they will want to migrate.
    i. This is not a records archival system.
    ii. Back-up of data and archival of data should be done in accordance with IRS 990 Record Retention Policies and contract requirements.

d. In its basic form, data migration is putting information into an Excel Spreadsheet and then uploading it into ETO.

6. What type of training will be provided on how to use ETO?

a. Regional Training in February 2012 for agencies using ETO Impact
    i. Six locations across Pennsylvania have been identified to hold in-person training.
    ii. Two trainings will be offered at each location.
    iii. Two staff members per agency are permitted to attend a training.
    iv. Core staff members should attend the in-person training and then take information back to the rest of the agency and educate other staff members on ETO Impact.
    v. A training manual will be provided. It will be your step-by-step guide for using ETO Impact.

b. Virtual Training for ETO Impact
    i. Virtual training will be offered in March 2012
    ii. Training will be recorded and placed on PCCD website for future use.

c. Virtual Training for ETO Community
    i. Agencies only using ETO Community (Funder Reports and ESQ-LF data collection) will be provided with a virtual training in March 2012.
    ii. Training will be recorded and placed on PCCD website for future use.

d. Social Solutions Training Calendar
    i. Various trainings are offered on a reoccurring basis by Social Solutions
    ii. Many trainings are free and can be accessed through the Training Calendar Link that will be on your ETO Site home page.

7. When will agencies have to officially start using ETO?

a. July 1, 2012

        i. VOCA, PCAR and PCADV reports will be required to be entered through ETO Community beginning July 1, 2012.
        ii. Most agencies using ETO Impact will likely begin entering client data into ETO as soon as they are trained.
            1. In March 2012 every agency using ETO Impact should be able to enter client data directly into ETO Impact.

8. What organizational practices should my agency implement in regards to ETO?

a. Add the use of ETO to job descriptions.
b. Add the use of ETO to staff evaluations.
c. Demonstrate buy-in from top down.
d. Prepare for organizational culture shift.
    i. If services to a recipient are not documented in ETO, those services didn't occur.
e. Administrators prepare to dedicate time each week to ETO.