

# Working with Participants & Families Webinar

# Meet Your Trainer

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# Learning Objective

This session will support users in understanding best practices for adding new participants and families in ETO.

# Agenda

Intro

Preventing Duplicates

Adding New Participants &  
Families

Exiting Participants & Families

# Intro

# Intro

- Members of your target population
- Can be called by other names
- Can be grouped together



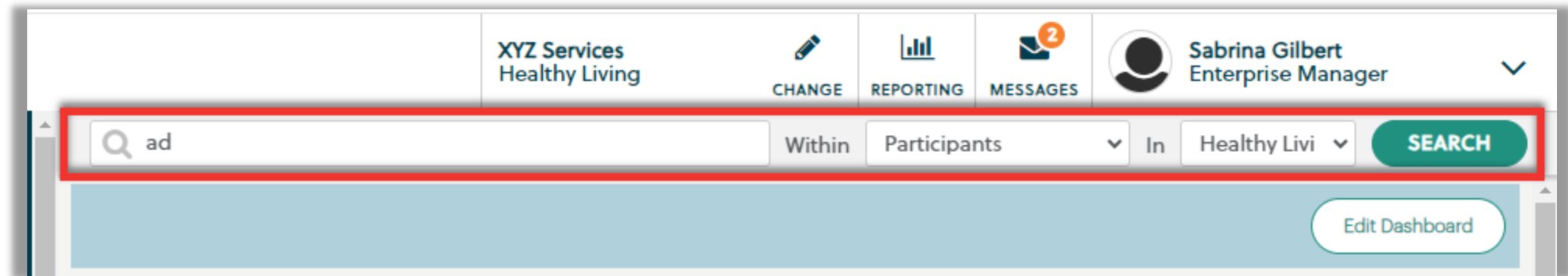
# Preventing Duplicates

# Preventing Duplicates

Search first

Quick Search

Site level scope





# Preventing Duplicates

Both active and inactive

Shows enrollment status

Click existing record for more details

The screenshot shows a search interface for 'michael' within 'Participants' in 'XYZ Services'. The results are filtered by 'First Name'. A table lists three participants: Foster, Michael; Hill, Michael; and Slim, Michael. The table has columns for Participant Name, Casenumber, DOB, and Siteenrollment. Red circles highlight the first name, DOB, and Siteenrollment columns. The first row is highlighted, and the enrollment status is 'Currently enrolled in site'. The second row is 'Currently not enrolled in any programs in site'. The third row is 'Currently enrolled in site'. The interface also shows a search bar, a user profile for Sabrina Gilbert, and navigation buttons for Change, Reporting, and Messages.

PARTICIPANT NAME	CASENUMBER	DOB	SITEENROLLMENT
<a href="#">Foster, Michael</a>	10923	11/10/2001	Currently enrolled in site
<a href="#">Hill, Michael</a>	8201	2/19/2017	Currently not enrolled in any programs in site
<a href="#">Slim, Michael</a>	8400	3/28/2018	Currently enrolled in site

# Preventing Duplicates

Name in results is existing record

Use Enroll Participants feature to make them active in your program

Allows participant to be active in multiple programs simultaneously

**Enroll Participants into Healthy Living** 1

Search for Participants in XYZ Services 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: fos 2  
First Name:   
or  
SSN:   
or  
Case Number:   
or  
Family Name:

Below are all Participants who are not currently enrolled in Healthy Living with last name like 'fos'.

<input checked="" type="checkbox"/>	PARTICIPANT	AGE	CASE NUMBER	DOB
<input checked="" type="checkbox"/>	Michael Foster 3	22	10923	11/10/2001

\* Program Start Date: 4/25/2024 4

5

# Adding New Participants & Families

# Adding a new Participant

## Steps:


1. Participants
2. Add New Participant
3. Enter demographic details
4. Click Save

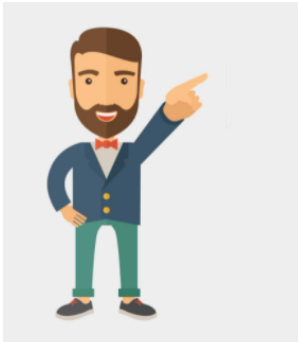
The screenshot shows a web application interface for adding a new participant. On the left is a dark sidebar menu with the following items: Participants (marked with a red '1'), Add Demo. by Group, Duplicated Participants, Enterprise Enroll, Find Participant, View Participant Info, Add New Participant (marked with a red '2' and a mouse cursor), Add New Family, View/Edit Participant, Enroll Participants, Dismiss Participants, Dismiss Participants by Date, and Enroll Participants (C). The main content area has a search bar with 'michael' entered. Below the search bar is a 'Program Enrollment' section with a checked 'Enroll in Program' checkbox and a 'Program Start Date' field containing '4/25/2024'. Below this is the 'Add New Participant' section (marked with a red '3'), which contains a 'Prefix' dropdown menu (currently showing '--Select--'), a 'First Name \*' text input field, a 'Middle Name' text input field, a 'Last Name \*' text input field, and a 'Suffix' dropdown menu (currently showing '--Select--').

# Participant Dashboards in ETO

- Automatically created
- Contains Action Links
- Customized by Admin


### Participant Information





 **Joe Able**



**Address1:** 101 Chestnut Ave  
**ZipCode:** 12345  
**City, State:** Schenectady, NY  
**E-Mail:** [joeable@example.com](mailto:joeable@example.com)  
**CaseNumber:** 54321  
**DOB:** 4/3/1998  
**Age:** 23 years  
**CellPhone:** (212) 989-2129  
**Alert:**  
[View/Edit Participant](#)


### Recent TouchPoints

 **Joe Able's Recent Clinical Case Note**

Take Action	TouchPoint	Date Completed	Approval Status
   	Clinical Case Note	2/3/2021	Pending

[+ New](#)

### Programs

 **Programs**

Program Name	Start Date	End Date	Reason for Dismissal
<a href="#">HOL Instructor Program</a>	5/6/2021	Pending	
<a href="#">HOL Instructor Program</a>	8/20/2020	5/6/2021	Graduated
<a href="#">Buddy's Pet Friendly Place Program 5</a>	3/26/2020	Pending	
<a href="#">Intake - Reentry</a>	2/22/2020	Pending	
<a href="#">Food Pantry (disabled)</a>	12/12/2019	Pending	
<a href="#">Alerts- User 2</a>	10/8/2019	Pending	
<a href="#">Alerts</a>	8/2/2017	Pending	
<a href="#">Case Management</a>	7/28/2017	Pending	
<a href="#">Intake and Screening (disabled)</a>	12/18/2016	Pending	
<a href="#">Intake and Screening (disabled)</a>	10/3/2016	Pending	

Page: [1](#) [2](#)

[Review All \(11\)](#)

# Adding a new Family

## Steps:

1. Participants
2. Add New Family
3. Enter Family Name
4. Select Relationship of 1st member
5. Enter demographic details
6. Select Relationship of 2<sup>nd</sup> member
7. Enter demographic details
8. Repeat steps 5 & 6 for each family member
9. Click Save

1 Participants

2 Add New Family

3 Family Name: Iola Batten Family

4 Click to Add Family Member by Family Relationship

Parent

Child

Aunt

Uncle

Grandmother

Grandfather

Step Parent

Other

Spouse

Domestic Partner

\* Start Date

04/25/2024

Save

# Family Dashboards in ETO


Automatically created

Contains Action Links

Click Name to work 1:1

**Melody Fake Family Dashboard**

**Family Information**

 **Melody Fake Family**




[Melody Fake](#) Spouse **Head of Household**

[Bubba Fake](#) Spouse


[Michael Foster](#) Child

[Family Program History](#)

[Family Composition History](#)

**Recent TouchPoints**

 **Recent TouchPoints**

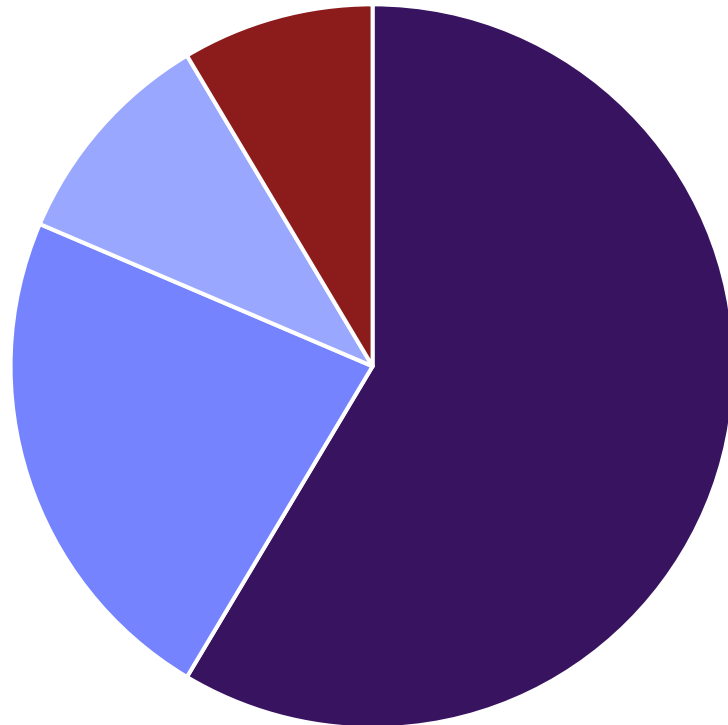
You have no recent TouchPoints.

[+ New](#)

# Best Practice

Enter as much data as you can into the demographic fields as any field can be included as part of a report

Demographics



■ Blank ■ Male ■ Female ■ Transgender





# Exiting Participants & Families

# Exiting Participants & Families

No longer receiving services

Can dismiss individual and or Family

Data still reportable

Can be re-enrolled

### Dismiss Participants from Healthy Living

Search for Participants in XYZ Services 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 dismiss. 3. Enter dismissal 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:

Below are all Participants who are currently enrolled in Healthy Living with last name like 'fab'.

<input type="checkbox"/>	PARTICIPANT	AGE	CASE NUMBER
<input checked="" type="checkbox"/>	Benny Fabian		10653
<input type="checkbox"/>	Nick Fabian	18	11590

Page size: 25 2 items in 1 pages

Program End Date:

Dismissal Reason:

# Additional Resources

# Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities



Build confidence & knowledge in  
our software!

# Customer Support

**Reach out to our Customer Support Team with Questions or Concerns.**

Weekdays 7am – 7pm CST via chat or through email: [eto@bonterratech.com](mailto:eto@bonterratech.com)

# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you  
in future trainings.