

# CASA/LA ETO Training

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# Agenda

**Importance of ETO**

**Overview of ETO Terms**

**Logging Into ETO**

**Volunteer's Dashboard**

- **Monthly Volunteer Hours**

**Child's Dashboard**

- **Child Visit Log**
- **Case Note Log**
- **Case Contacts**
- **Downloading Key Information**



# Importance of ETO

- Helps keep all your notes in one place
- Helps your supervisor know what's going on in your case – especially if you're not able to connect with them every month
- Allows another CASA to transition onto a case smoothly if you must come off
- Helps us with tracking data for grants, funding, and impact reports (especially those volunteer hours and child placements!)
- Ultimately, it **helps us all best serve the child**

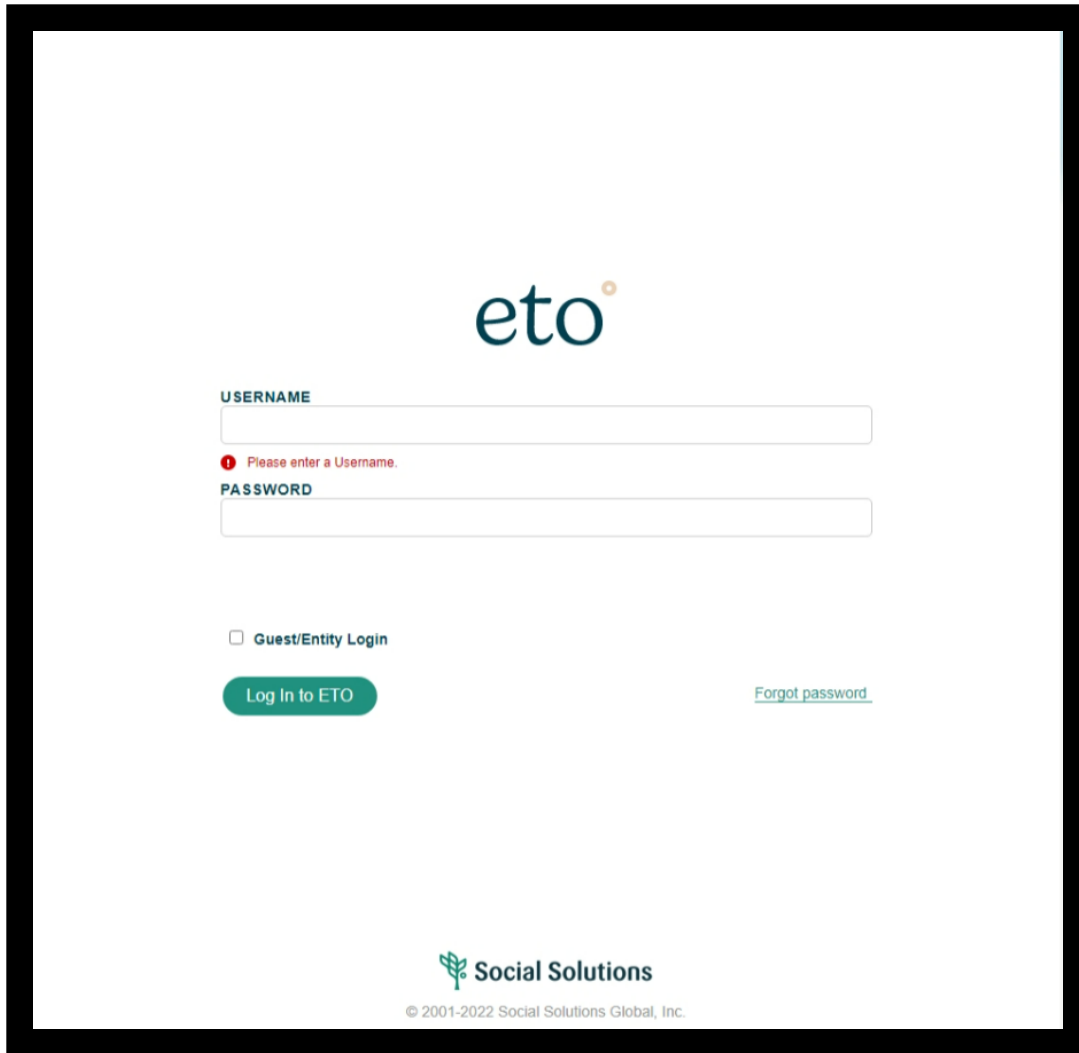


# Overview of ETO Terms

- **ETO:** Software we use to store and organize case Files
- **Touchpoint:** An online form on ETO
- **Dashboard:** Provides a summary of the most recent activity on the file.
- **Programs:** Advocacy and Waitlist.



# Logging into ETO

A screenshot of the ETO login page. The page has a white background with a black border. At the top center is the 'eto' logo in a dark teal color. Below the logo are two input fields: 'USERNAME' and 'PASSWORD'. The 'USERNAME' field has a red error message below it that says 'Please enter a Username.' Below the 'PASSWORD' field is a checkbox labeled 'Guest/Entity Login'. At the bottom left is a green button labeled 'Log In to ETO'. At the bottom right is a link labeled 'Forgot password'. At the very bottom center is the 'Social Solutions' logo and the copyright text '© 2001-2022 Social Solutions Global, Inc.'

eto

USERNAME


Please enter a Username.

PASSWORD

☐ Guest/Entity Login

Log In to ETO

[Forgot password](#)

 Social Solutions

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- [www.secure.etosoftware.com](https://www.secure.etosoftware.com)
- For best use, always use Google Chrome or Internet Explorer
- Username is your CASA email ([\\_\\_\\_\\_@advocatecasala.org](mailto:____@advocatecasala.org))
- If you have trouble remembering your password, click "Forgot password".

# Volunteer's Dashboard

The screenshot shows the Volunteer's Dashboard for ETO and CASA. The top navigation bar includes the ETO and CASA logos, a search bar, and a dropdown menu for 'CASA LA Advocacy'. A blue arrow points from a text box to this dropdown. Below the navigation bar, there's a section for 'Volunteer Hours TP Direct' with a 'Record Monthly Hours' button. The main content area is titled 'CASA Message Board' and contains several sections: 'Need Technical Assistance with ETO or your Advocate email?', 'ETO Video Tutorials', and 'HELPFUL RESOURCES:'. A blue bracket groups these three sections, with a text box pointing to it. The user's profile 'Fake Casey CASA Staff' is visible in the top right corner.

**Dashboard:** If you are trying to view your current advocacy case, this should say "Advocacy". If you are trying to view a case before you have accepted, you should click this and change it to "Waitlist"

Please check back regularly for up-to-date information and updates about ETO and other things that may assist you in your advocacy work.

**Need Technical Assistance with ETO or your Advocate email?**

- Contact the ETO Help Desk Monday-Friday 8:30am to 4:30pm at [ETOHelp@casala.org](mailto:ETOHelp@casala.org)
- Schedule a **one-on-one in-person refresher training** with the ETO Help Desk.

**ETO Video Tutorials**



- How to view a child on the waitlist: [Click here to view video tutorial](#)
- ETO Webinar: [Click here to view video tutorial](#)
- CASA Volunteer File: [Click here to view video tutorial](#)

**HELPFUL RESOURCES:**

- Advocate Handbook - [Click here](#) to get your copy.
- Advocate email - click on the following link: [portal.microsoftonline.com](http://portal.microsoftonline.com)
- CASA Volunteer Handbook - [Click here](#) to get your copy. **(NEW)**
- Court Report Template - [Click here](#) to get your copy.
- Court Report Writing Handbook - [Click here](#) to get your copy.
- Child Baseline and Outcome Scales - [Click here](#) to get your copy.
- Advocacy Goals Defined - [Click here](#) to get your copy.
- TouchPoint Reference Guide - [Click here](#) to get your copy.

Please utilize your CASA Message Board for resources to better help you navigate ETO, court reports, and overall advocacy.

# Volunteer's Dashboard (cont.)



CASA LA Advocacy

CHANGE

Fake Casey CASA Staff

▼









































My Caseload

My Caseload

PARTICIPANT	CASEWORKER RELATIONSHIP	START DATE
<a href="#">Andrew Fake</a>	CASA Viewing for Potential Match	1/18/2022
<a href="#">Chidi Fake</a>	Providing Advocacy	12/20/2021

My Recent Volunteer Hours

My Recent Volunteer Hours

Take Action	TouchPoint	Name	Date Last Updated	Please enter the date (mm/dd/yyyy) of the last day of the month you are recording these hours for:	Total time spent on Advocacy:
   	Monthly Volunteer Hours	<a href="#">Fake Casey CASA</a>	6/16/2022	6/30/2022	5h 0m
   	Monthly Volunteer Hours			12/31/2021	2h 20m
   	Monthly Volunteer Hours			2/28/2022	0h 20m
   	Monthly Volunteer Hours			12/31/2021	1h 0m
   	Monthly Volunteer Hours			10/31/2021	4h 0m
   	Monthly Volunteer Hours			9/30/2021	2h 0m
   	Monthly Volunteer Hours			9/30/2021	4h 0m
   	Monthly Volunteer Hours			4/30/2021	2h 0m
   	Monthly Volunteer Hours			10/31/2020	4h 0m
   	Monthly Volunteer Hours	<a href="#">Fake Casey CASA</a>	7/24/2020	8/31/2020	

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+ New

**My Caseload:** You will be able to access your child's ETO dashboard from here.

**My Recent Volunteer Hours:** You will log your monthly hours of advocacy using this touchpoint. To create a new entry, click the +New button below, or "Record Monthly Hours" at the top of your dashboard.

# Monthly Volunteer Hours

Monthly Volunteer Hours for Fake Casey CASA on 6/21/2022

Identifier:

"(MONTH) (YEAR) Volunteer Hours"

Advocacy Hours

Continuing Education Hours

Please enter the date (mm/dd/yyyy) of the last day of the month you are recording these hours for: \*

mm/dd/yyyy



Ex. For June 2022, you would put 06/30/2022

## Instructions for recording your advocacy hours:

Use this page to record the number of hours you spend on your CASA case(s) each month. CASAs should record one Monthly Volunteer Hours TouchPoint each month. You may add time to your Monthly Volunteer Hours TouchPoint throughout the month as needed. To do this, simply "edit" your TouchPoint.

Total time spent with child (in-person, on the phone, and other contact):

Hours  :  Minutes

Total travel time: ?

Hours  :  Minutes

**Total time spent on Advocacy:**

Hours  :  Minutes

Mileage you would like to record for the month (optional):

This is the total of the two boxes above, PLUS any additional hours spent communicating with other members of the child's team (CSW, attorney, therapist, teacher, etc.). Please note if you saw any of these people at a meeting with the child, you will not count them twice.



# Child's Dashboard

The screenshot displays the 'eto' (eto.org) interface for a child's dashboard. The top navigation bar includes the 'eto' logo, a search bar, and user information for 'Fake Casey CASA Staff'. The main content area is titled 'Andrew Fake's Dashboard' and contains several sections:

- Reports to Download:** Includes buttons for 'Notes for Court Report' and 'All Case Contacts'.
- Record New Child TouchPoints:** Includes buttons for '+ Case Documents', '+ Child Visit Log', '+ Case Note Log', and '+ Case Contact'.
- Participant Info:** Displays a cartoon image of a child and personal details: DOB: 06/27/1999, Age: 22 years, Minor's Court Case Number: CK099999, Primary Language Spoken: Urdu, Identifying Gender: Male, Race/Ethnicity: Native American, Court Location: Monterey Park, Court Room Number/Department: CC408, NMD Court Case Number: [blank].
- Caseworkers:** A table showing assigned staff.
- Collection (i.e. sibling set) Dashboard link, as applicable:** A section for sibling set information.
- Justice System Involvement:** A table showing involvement in the juvenile justice system.

Four blue callout boxes provide additional context:

- Top Left:** "You can add new notes/touchpoints to any of your child's dashboard sections using these buttons here, or you may scroll down to each section individually and click the +New button at the end of the section." (Points to the 'Record New Child TouchPoints' buttons.)
- Top Right:** "This section shows who is currently assigned to the child's case. You should see your name and your advocate supervisor's name listed." (Points to the 'Caseworkers' section.)
- Middle Right:** "If you are assigned to a sibling set, this holds shared information between your cases (i.e. hearing dates, case documents, etc.)" (Points to the 'Collection (i.e. sibling set) Dashboard link' section.)
- Bottom Right:** "If your child/youth is currently involved in the juvenile justice system, this touchpoint holds information on their case in the other court system. Your supervisor completes this touchpoint, but you are able to view it." (Points to the 'Justice System Involvement' section.)

The footer includes 'Social Solutions' logo, copyright information '© 2001-2022 Developed by Soc', and social media icons for Twitter, Facebook, Instagram, YouTube, LinkedIn, and Email.

# Child's Dashboard– Touchpoint "Cheat Sheet"

WHEN	WHAT	WHO	WHY
Required At End of First 30 Days	Record "Baseline Scale" and "Advocacy Goals"	CASA and Supervisor <u>complete together</u> *  *Supervisor must record	<ul style="list-style-type: none"> <li>To identify advocacy needs and activities directly relating your individual child.</li> </ul>
Required Monthly	Record "Child Visit Log" TouchPoint	Complete <u>on your own</u>	<ul style="list-style-type: none"> <li>To enter notes about your face-to-face visit or contact with your child.</li> </ul>
	Record "Case Note Log" TouchPoint	Complete <u>on your own</u>	<ul style="list-style-type: none"> <li>To enter notes about your calls, emails, visits with <b>other</b> people in your child's life.</li> <li>To maintain appropriate CASA court records and timely access to relevant case information to Supervisor/Peer Coordinator.</li> </ul>
	Record "Volunteer Hours (Monthly)" TouchPoint	Complete <u>on your own</u>	<ul style="list-style-type: none"> <li>To track Volunteer hours for regulatory standards and for continuing education requirements.</li> </ul>
Required Monthly	Record "Monthly Case Review" TouchPoint	<u>Supervisor completes</u>	<ul style="list-style-type: none"> <li>To provide clear updates on the advocacy work provided on a monthly basis and keep advocacy interventions focused on the goals identified.</li> </ul>
As Needed	Update "Advocacy Goals" Touchpoint	CASA and Supervisor <u>complete together</u> *  *Supervisor must record	<ul style="list-style-type: none"> <li>To identify advocacy needs and activities directly relating your individual child.</li> </ul>
	Record/Update "Case Contacts" TouchPoint	Complete on your own	<ul style="list-style-type: none"> <li>To keep contact info updated in the system - which can also be printed.</li> </ul>
	Record "Case Documents" TouchPoint	Completed either by your Supervisor or <u>on your own</u>	<ul style="list-style-type: none"> <li>To upload case documents that are important to keep as part of the child's case file.</li> </ul>
	Run "All Case Contacts" Report	Run <u>on your own</u>	<ul style="list-style-type: none"> <li>To enable a printed list of your child's contacts.</li> </ul>
	Run "Notes for Court" Report	Run <u>on your own</u>	<ul style="list-style-type: none"> <li>To help in the preparation of a factual and objective CASA Court report of findings, observations, and recommendations.</li> </ul>
Required End of Case	Record "Outcome Scale"	CASA and Supervisor <u>complete together</u> *  *Supervisor must record	<ul style="list-style-type: none"> <li>To rate the child's risk in areas of Safety, Permanency and Well-Being at the time of CASA's relief.</li> </ul>

# Child's Dashboard – Downloading Key Information














The screenshot displays a web application interface for a child's dashboard. At the top, there is a search bar labeled "Search Term(s)..." and a "Within" dropdown. Below this, a header bar identifies the user as "Andrew Fake's Dashboard".

The main content area is divided into several sections:

- Reports to Download:** This section contains two yellow buttons: "Notes for Court Report" and "All Case Contacts". A blue callout box with an arrow pointing to these buttons contains the text: "To download all your notes for the purpose of your court report, or to download all active case contacts, you will use these buttons at the top of your child's dashboard."
- Record New Child TouchPoints:** This section features four buttons: "+ Case Documents", "+ Child Visit Log", "+ Case Note Log", and "+ Case Contact".
- Participant Info:** A panel on the left showing a cartoon illustration of a child with orange hair and a yellow shirt.
- Caseworkers:** A panel on the right showing "Andrew Fake's Caseworker" with a "Take Action" button and a "Staff" dropdown menu.

At the bottom of the dashboard, there is a section for "Collection (i.e. sibling set) Dashboard link" and a copyright notice: "© 2001-2022 Developed by Social..."

# Child's Dashboard – Downloading Key Information

Web Intelligence              Reading Design

## Contacts for Fake, Andrew

### Active Contacts

#### Children's Social Worker (CSW)

<b>Contact Name:</b>	Judy Brown		
<b>Title:</b>	Social Worker		
<b>Family Member's Relationship to Child:</b> (if applicable)			
<b>Organization/Business:</b>		<b>DCFS Office Location:</b>	El Monte- SPA 3
<b>Home/Office Phone</b>	(555) 888-8888	<b>Address 1:</b>	2218 5th Street
<b>Cell Phone</b>	(555) 777-7777	<b>Address 2:</b>	
<b>Home/Office Email</b>	JB@casala.org	<b>City:</b>	Bell Gardens
<b>Alternate Email</b>		<b>Zip Code:</b>	90201
<b>Notes:</b>			

<b>Contact Name:</b>	Martha Jones		
<b>Title:</b>	CSW		
<b>Family Member's Relationship to Child:</b> (if applicable)			
<b>Organization/Business:</b>	DCFS	<b>DCFS Office Location:</b>	Metra North SPA 4

Once the report has been run, a new page should pop up to allow you to download the information to your computer. You will press the export button highlighted here, and NOT the save (floppy disk) button.

# Child's Dashboard – Downloading Key Information

Export

Select

☒ Reports

☐ Data

☒ Select All

☒ Case Contacts

File Type: PDF

☐ Current Report

☒ All pages

☐ Current Page

☐ Page(s)

From: 1



To: 1


Images DPI: Default

OK Cancel


You will then make sure that the Report option is clicked, and then make sure the File Type is listed as "PDF" before clicking "OK".

# Child's Dashboard – Downloading Key Information

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**Contacts for Fake, Andrew**



**Active Contacts**

**Children's Social Worker (CSW)**

<b>Contact Name:</b>	Judy Brown		
<b>Title:</b>	Social Worker		
<b>Family Member's Relationship to Child:</b> (if applicable)			
<b>Organization/Business:</b>		<b>DCFS Office Location:</b>	EI Monte- SPA 3
<b>Home/Office Phone</b>	(555) 888-8888	<b>Address 1:</b>	2218 5th Street
<b>Cell Phone</b>	(555) 777-7777	<b>Address 2:</b>	
<b>Home/Office Email</b>	JB@casala.org	<b>City:</b>	Bell Gardens
<b>Alternate Email</b>		<b>Zip Code:</b>	90201
<b>Notes:</b>			

**Contact Name:** Martha Jones

The PDF version of your information should then pop up in your browser, which you can download to your computer using the highlighted button. You can then save it in a private folder on your desktop for CASA information.

# THANK YOU!

**Hiba Zakkour, IT Coordinator**  
**Etohelp@casala.org**