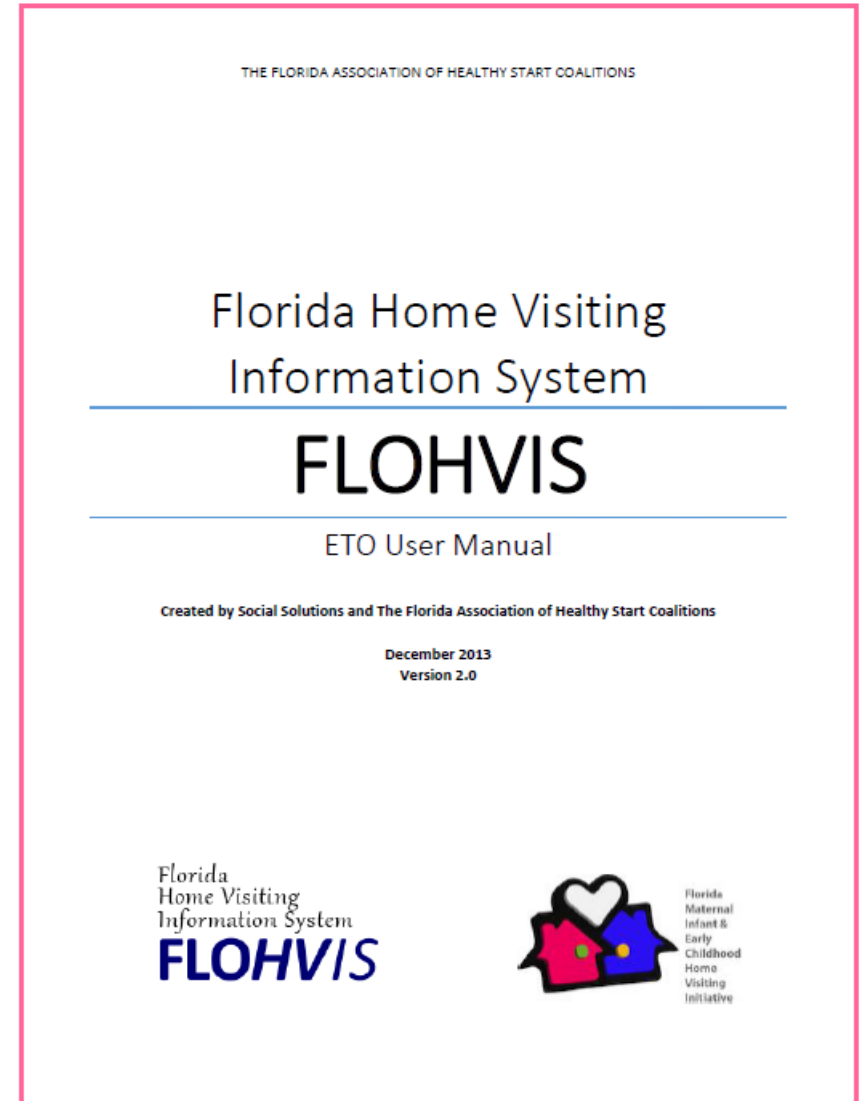




# Florida MIECHV Parents as Teachers ETO/FLOHVIS End User Training

# Read this! Refer to it! Love it!

- FLOHVIS User Manual
  - PAT Dropbox Site
  - MIECHV website  
*(coming soon!)*



# Today's Training Agenda

---

- ETO Basics
- Recording Data in ETO
  - Add Participant
  - View/Edit Participant
  - Record a TouchPoint
    - Child Record TouchPoints
- My Caseload
- Entity Records
- Dismiss Participant
- Wrap Up

## Tips for Using ETO

---

- ETO Software is a PC web-based software using Internet Explorer.
  - **ETO works best using Internet Explorer (Version 8 or higher).**



- Mac Users, you will need to install a conversion application (like Boot Camp) that will allow you to run Microsoft Office Products in order to use ETO on your Mac.



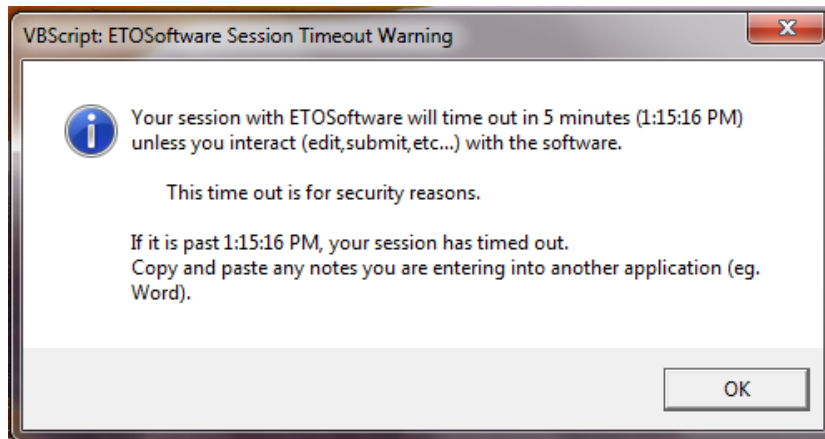
# Tips for Using ETO

---

- Avoid using the Internet's back button



- Timeout after 60 minutes of no activity



- Always logout when you are done

Welcome [Fake Staff](#) | [Home Page](#) | [Help](#)

| [Log Off](#)



# ETO Terminology

---



- **Demographics:**

- Contact information, background information, and facts about a participant that will not change (e.g., Date of birth, SSN). The Demographics page is the participant's core record and moves with them from program to program within ETO.

- **Dismissal:**

- Dismissal makes a participant "Inactive" in a particular program. For instance, when a participant has completed all goals for the Parents As Teachers program you will dismiss the participant from ETO with a dismissal reason of "completed program".

# ETO Terminology

---

## ■ Entities:

- A record for any type of third party that is relevant to the work that PAT does. (E.g. staff members and outside service providers that receive referrals from PAT).

## ■ Navigation Bar:

- The green menu bar on the right-hand side of the screen. This is usually collapsed but to perform some function (e.g. running reports) you may need access to it.



# ETO Terminology

---



## ■ Participant

- This is the ETO word for an individual who receives services from a program. In FLOHVIS, this is only the Primary Caregiver. We will use the terms ***Participant*** and ***Primary Caregiver*** interchangeably.

## ■ TouchPoint:

- A questionnaire/form that captures static data, or tracks changes in knowledge, belief, attitude, and/or behavior periodically. Most of your data will be entered in TouchPoints.



# ETO Terminology

---

- **Site: Program**

## **Parents As Teachers-County: County**



- Each MIECHV PAT site has its own site in ETO/FLOHVIS. Primary caregivers are added as Participants in the Site (***Parents As Teachers-County***) and are then enrolled into the Program (***County***). Various TouchPoints are completed while the primary caregiver is enrolled in this Program. This is the only program available.

- Parents as Teachers-Alachua: Alachua
- Parents as Teachers-Bradford: Bradford
- Parents as Teachers-Manatee: Manatee
- Parents as Teachers-Pinellas: Pinellas
- Parents as Teachers-Putnam: Putnam
- Our training Site: Program is **Parents as Teachers-Training: Fake Program**



**Available MIECHV  
Sites: Programs**

# ETO Terminology

---

## ***TouchPoints in ETO***

- Contact/Personal Visit Record
  - Edinburgh (EPDS)
  - Family Member Information
  - Family Profile
  - Goal Tracking
  - Group Connection Attendance
  - Life Skills Progression (Caregiver)
  - MIECHV Benchmark Evaluation
  - Perceived Stress Scale
  - Referral Tracking
  - Relationship Assessment Tool (RAT)
  - Safety Plan Status
  - Visit Frequency
  - Child Record
- (The TouchPoints below can only be completed AFTER the Child Record is created)*
- ASQ-3
  - ASQ-SE
  - H.O.M.E. Inventory
  - Health Record
  - Life Skills Progression (Child)

# Logging in to ETO software

---

**Universal URL:** [etosoftware.com](https://etosoftware.com)

Your user name and password are case sensitive. You will be prompted to change your password right away and every 90 days for security reasons.

ETO™ software

**Username:**

**Password:**

**Log In**

**[Forgot your password?](#)**

☐ **Guest/Entity Login**

# Basic Navigation

When you log on, you see your **Home Page**. It has links to the features you will use most often in ETO. The “My Dashboard” feature has been customized for use as your Home Page.


Florida  
Home Visiting  
Information System  
**FLOHVIS**

Add New Participant

View/Edit Participant


Record a Touchpoint

Dismiss Participant



Florida  
Maternal  
Infant &  
Early  
Childhood  
Home  
Visiting  
Initiative


My Caseload



My Caseload

Take Action	Participant	Start Date
<a href="#">Remove</a>	<a href="#">Mama Fake</a>	10/9/2013
<a href="#">Remove</a>	<a href="#">fake fakerson</a>	11/8/2013


Dashboard Search



Dashboard Search

Dashboard Search:


Recent Participants/Entities



Recent Participants

Name
<a href="#">Mama Fake</a>

Recent TouchPoints



My Recent TouchPoints

Take Action	TouchPoint	Name	Date Completed	Date Last Updated
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Goal Tracking	<a href="#">fakerson, fake</a>	11/6/2013	11/6/2013
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Referral Tracking	<a href="#">fakerson, fake</a>	11/6/2013	11/6/2013
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Child Record	<a href="#">fakerson, fake</a>	11/6/2013	11/6/2013
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Child Record	<a href="#">Fake, Virginia</a>	10/8/2013	10/9/2013
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Edinburgh (EPDS)	<a href="#">Fake, Mama</a>	10/1/2013	10/3/2013

[New](#)

# Basic Navigation

---

Home

New

Quick Search

To Do List

Messages

My Favorites

My Dashboard

## Quick Search Bar

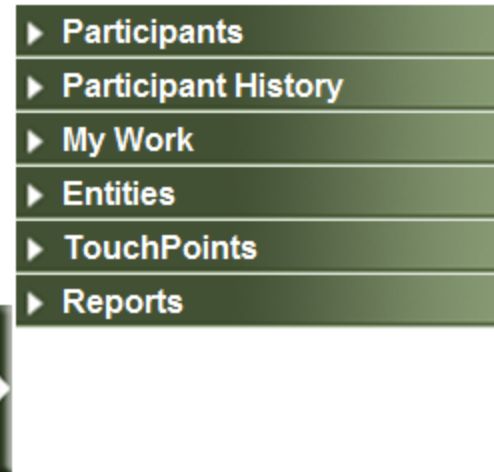
- **Home**: This returns you to the Home Page.
- **New**: Allows you to add new participants and entities
- **Quick Search**: Allows you to search active participants in your program/site and then select an action to complete with the selected individual.
- **To Do List**: This takes you to the your personal (i.e. your user account) To Do List, which shows reminders that you set on assessments or efforts.
- **Messages**: Send new messages or read received messages from this tab. When you have a new message, this tab will turn red.
- **My Favorites**: This tab allows you add features and reports that you use often..
- **My Dashboard**: This dashboard is YOU centric—see everything related to your work in the software.

# Basic Navigation

---

## The Navigation Bar

- The traditional Navigation Bar is on the right-hand side of your screen.
- All of the features that appear on this bar are available via the Home Page, Dashboards, or Quick Search.
- You should rarely need to use the Navigation Bar to complete your work with your Participants.



# Basic Navigation

---

## Basic Buttons

Welcome [Fake Staff](#) | [Home Page](#) | [Help](#) | [Log Off](#)

- **Fake Staff (Your Name)**: This links you to “My Account”, where you can control your user account’s settings, email address, and password under this button.
- **Home Page** : Use this button to route back to your homepage from any other page in the software. Be sure to submit/save your data *before* doing this!
- **Help**: Opens a menu of links to the online ETO Help Manual, Training resources, a form to submit to Customer Support, and a Chat option to communicate online with Customer Support.
- **Log Off**: Be sure to click this to properly log out of ETO, keeping your site secure and data safe. Do NOT just exit out of your Internet Explorer browser.

# Quick Search

---

- Before adding a participant, perform a search in ETO to make sure there is not already a record for them.
- The most popular search option is the Quick Search, which is one of the green tabs at the top of the screen.





# Quick Search



The screenshot shows a web application interface with a navigation bar at the top containing tabs: Home, New, Quick Search, To Do List, Messages, My Favorites, and My Dashboard. Below the navigation bar is a search section. It features a text input field labeled "Enter Search Term(s)", a dropdown menu labeled "within Participant" with a downward arrow, and a text input field labeled "in Alachua" with a dropdown arrow. Below the "in Alachua" field, a dropdown menu is open, showing "Parents As Teachers - Alachua". To the right of the search inputs is a green "Search" button. Below the search section is a dark green bar labeled "My Dashboard".

- You can search by partial or full first name, partial or full last name, SSN or Case Number. Leave the search terms box empty to see a list of all active participants in the program. Be sure to also search at the site level in case the Participant was enrolled in the program previously, but then dismissed.
- The Quick Search box can also be used for Entities. Change the “within” box from **Participant** to **Entities** to find and work with an entity record.

# Quick Search

---

- Click on the name of the participant you would like to work with. You will then see a menu with actions you can take.
- Click on any of the links to work with the participant in the software.



# Add New Participant

- Participants are added into ETO using the Add Participant feature, located on the Home Page. Let's add a new participant.

Add New Participant	Add Participant:	
	Participant Information	
	Case Number:	<input type="text"/>
	*First Name:	<input type="text"/>
	Middle Initial:	<input type="text"/>
	*Last Name:	<input type="text"/>
	*DOB:	<input type="text" value="-Month-"/> <input type="text" value="-Day-"/> <input type="text" value="-Year-"/>
	SSN:	<input type="text"/>
	Address 1:	<input type="text"/>
	Address 2:	<input type="text"/>
	Zip Code:	<input type="text"/> - <input type="text"/>
	Home Phone:	<input type="text"/>
	Work Phone:	<input type="text"/>
	Cell Phone:	<input type="text"/>
	Email:	<input type="text"/>
	Referral Source (FL):	<input type="text" value="--Select--"/>
	Gender:	<input type="text" value="--Select--"/>
Race (FL):	<div><input type="checkbox"/> American Indian or Alaska Native</div> <div><input type="checkbox"/> Asian</div> <div><input type="checkbox"/> Black or African American</div> <div><input type="checkbox"/> Native Hawaiian or other Pacific Islander</div> <div><input type="checkbox"/> White</div> <div><input type="checkbox"/> Declined to self-identify</div>	
Ethnicity (FL):	<input type="text" value="--Select--"/>	

# Add New Participant

---


- Make sure that the *Enroll in Program* box is checked at the bottom of the Demographic Screen. The *Program Start Date* defaults to today, but can be changed if they enrolled prior to today.
- Select Add Participant to create the new record for the Participant.

Program Enrollment Information	
Enroll in Program:	<input checked="" type="checkbox"/> Alachua
*Program Start Date:	Feb ▼ 18 ▼ 2014 ▼
<div>&gt; Add Participant</div>	

# Add New Participant

- Once the participant is added, you will be directed to the Participant's Dashboard.

**Participant Information**

 fake fakerson


DOB: 2/2/2010  
Age: 3 years

**Action Links**

 Links

[View/Edit Participant](#)  
[Participant Program History](#)  
[Dismiss Participants](#)  
[Record TouchPoints \(NEW\)](#)  
[View Participant TouchPoints \(NEW\)](#)  
[View Entity TouchPoints \(NEW\)](#)

**Child Record**

 Child Record

Take Action	Dashboard	Child First Name	Child Last Name	DOB
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	<a href="#">Child Record Dashboard</a>	Virginia	Fake	10/28/2013

New


**Goal Tracking**

 Goal Tracking

Take Action	Goal Name	Progress Rating
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Mental Health	Partially Completed

New


**Recent Referrals**

 Recent Referrals

Take Action	Date Completed	Date Last Updated	Service Provider	Referral/Service Status
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	11/6/2013	11/6/2013	Fake Medical Center	Service ongoing

New


**Caseworkers**

 fake fakerson's Caseworkers

Edit

Take Action	Staff	Start Date	End Date
<a href="#">Edit</a>	Fake Staff	11/8/2013	Pending

**Recent TouchPoints**

 fake fakerson's Recent TouchPoints

Take Action	TouchPoint	Date Completed
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Goal Tracking	11/6/2013
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Referral Tracking	11/6/2013
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	Child Record	11/6/2013

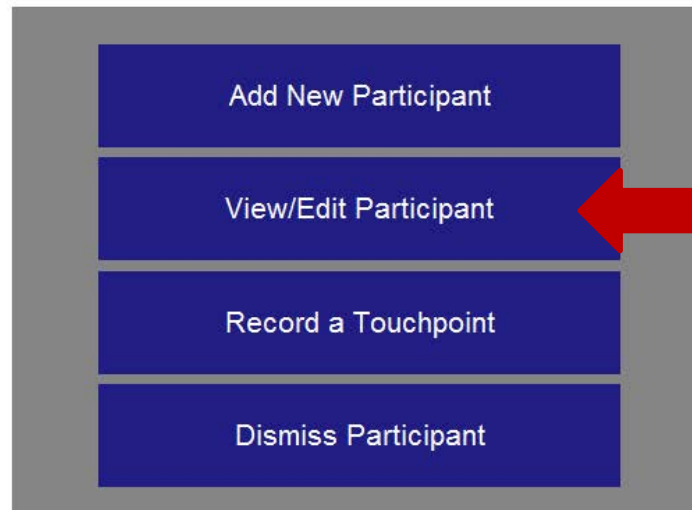
New

# View/Edit Participant

---

- To view or make change to demographics for your participant, select View/Edit Participant link from the Home Page.

Florida  
Home Visiting  
Information System  
**FLOHVIS**



# View/Edit Participant

- Search for the Participant by last name





Search for Participants in PAT - Alachua by (partial) Last Name, SSN or Case Number:

Show All Participants

Go

☐ Include Dismissed Participants in results

To see **all Participants** leave the box empty.

S.No	Name	DOB	SSN	Case No.
1.	 fake, fake	4/5/2008	unknown	11491
2.	 Fake, Mama	4/8/1986	111-11-1111	11467
3.	 Fake, Virginia	5/8/1993	123-45-6789	11492
4.	 fakerson, fake	2/2/2010	unknown	11493

- Once you locate the Participant, click on their name.

# View/Edit Participant

- From the View/ Edit Participant screen, you can update addresses, phone numbers and other demographic information.

**Edit Participant:**

[Program History](#) [Audit Report](#) [View Mama Fake's Dashboard](#)

**Status:** Currently Enrolled

Added to system on 9/23/2013 (52 days ago).  
Last Updated by Fake Staff on 10/3/2013.

<b>Case Number:</b>	<input type="text" value="11467"/>
<b>*First Name:</b>	<input type="text" value="Mama"/>
<b>Middle Initial:</b>	<input type="text"/>
<b>*Last Name:</b>	<input type="text" value="Fake"/>
<b>*DOB:</b>	<div>Apr 8 1986</div> <div>27 years old <a href="#">Reset DOB</a></div>
<b>SSN:</b>	<input type="text" value="111-11-1111"/>
<b>Address 1:</b>	<input type="text" value="2417 Fake Ave"/>
<b>Address 2:</b>	<input type="text"/>
<b>Zip Code:</b>	<div>21220 - Middle River, MD Baltimore</div>
<b>Home Phone:</b>	<input type="text" value="(410) 555-9876"/>
<b>Work Phone:</b>	<input type="text" value="(410) 555-8962"/>
<b>Cell Phone:</b>	<input type="text" value="(443) 555-2141"/>
<b>Email:</b>	<input type="text" value="fakemama@gfake.com"/>



## View/Edit Participant

---

Let's update a participant in ETO software.

1. Select View/Edit Participant.
2. Change a phone number.
3. Click "Submit" to save you changes.
4. Review your changes on the Audit Report.

# Participant TouchPoints

---

## Outcomes are tracked using TouchPoints.




- TouchPoints are used to track information and measure progress over time.
- TouchPoints can count the number of contacts with Participants and can track time spent working with participants.
- TouchPoints can be taken for individuals or groups (attendance).
- TouchPoints may have sub-forms which can only be completed after the Primary TouchPoint has been completed. The Child Record TouchPoint has sub-forms.

# Participant TouchPoints

- TouchPoints can be recorded by using the ***Record a TouchPoint*** Link on the Home Page.

Record a Touchpoint

- TouchPoints can also be recorded using the Quick Search dropdown option View/Record TouchPoint.

2.	 Fake Mama
3.	 Fake V
4.	 fakers

**Fake, Mama**

Mama Fake's Dashboard


View / Edit

View / Record TouchPoint

Program History

Dismiss from program

 MORE

 CLOSE

# Participant TouchPoints

- Parents as Teachers Participant TouchPoints

Take TouchPoint For Fake, Mama

Select TouchPoint:

-- Select a TouchPoint --

-- Select a TouchPoint --

- Child Record
- Contact/Personal Visit Record
- Edinburgh (EPDS)
- Family Member Information
- Family Profile
- Goal Tracking
- Life Skills Progression (Caregiver)
- MIECHV Benchmark Evaluation
- Perceived Stress Scale
- Referral Tracking
- Relationship Assessment Tool
- Safety Plan Status
- Visit Frequency

# Participant TouchPoints

---

**Let's review a few of the TouchPoints:**

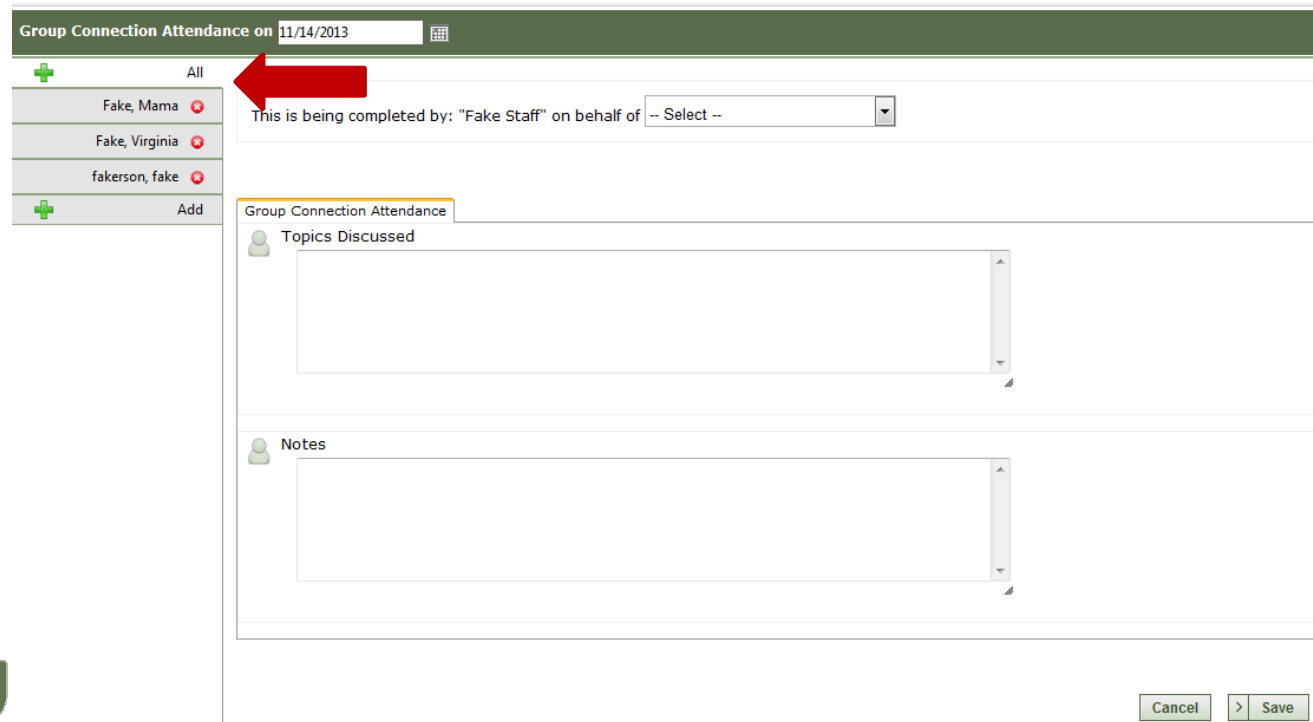
- Family Profile
- MIECHV Benchmark Evaluation
- Edinburgh (EPDS)
- Referral Tracking
- Group Connections\*
- Child Record\*\*

*\*Can be completed for multiple participants*

*\*\*Additional TouchPoints are made available after completion*

# Multiple Participant TouchPoints

- When Recording a TouchPoint for Multiple participants, the TouchPoint will open to the “All” tab. Whatever is entered there will appear on each participant’s record.
- Individual records can be changed by selecting that participant’s name.



The screenshot displays the 'Group Connection Attendance' interface for the date 11/14/2013. On the left, a sidebar contains a list of participants: 'All' (highlighted with a red arrow), 'Fake, Mama', 'Fake, Virginia', and 'fakerson, fake', each with a red 'x' icon. Below these is an 'Add' button with a green plus icon. The main area shows the 'All' tab selected, with a header 'Group Connection Attendance' and a date field. Below the header, there is a dropdown menu labeled 'This is being completed by: "Fake Staff" on behalf of' with a '-- Select --' option. The main content area is divided into two sections: 'Topics Discussed' and 'Notes', each with a large text input field. At the bottom right, there are 'Cancel' and 'Save' buttons.

# Child Record TouchPoints

- Once the Child Record TouchPoint has been completed, there will be additional Child-specific TouchPoints available.

Child Record for Mama Fake on

This is being completed by: "Fake Staff" on behalf of

First Page

MIECHV Enrollment Form

Is the target child? *(There is only one target child unless the children are twins, triplets, etc.) \**

Child First Name \*

Child Middle Name

Child Last Name \*


DOB \*

SSN \*

# Child Record TouchPoints

- Access the Participant's Dashboard, using the Quick Search option.
- Look for the Child Record Dashboard Part. Select the Child Record Dashboard.

**Child Record**

 **Child Record**

Take Action	Dashboard	Child First Name	Child Last Name	DOB
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	<a href="#">Child Record Dashboard</a>	Becky	Fake	5/27/2013
	<a href="#">New</a>			



# Child Record TouchPoints

- The information entered on the Child Record TouchPoint will appear on the left.
- On the right, you will see a Recent TouchPoints Part. Select New, to reveal the additional TouchPoints available.

Virginia Fake's Child Record Primary TouchPoint Dashboard Edit Dashboard

### TouchPoint Information

#### Child Record Information

Child First Name: Becky  
Child Last Name: Fake  
DOB: 5/27/2013  
SSN: 123456789  
Child Age At Enrollment: Birth (Mother enrolled during pregnancy)  
Gender: Female  
Race: White  
Ethnicity: Hispanic or Latino  
What kind of health insurance does your child have now?: Private health insurance from your job or the job of your spouse, partner, or parents  
Child's Due Date: 5/15/2013  
Birth weight (pounds): 2700  
Any illnesses or complications during pregnancy or delivery?: No  
Any hospitalizations since birth?: No  
Any current medical conditions?: No  
Name of child's health care provider: Fake Healthcare MD  
Date of last physical exam: 8/14/2013

### Recent TouchPoints

Take Action	TouchPoint Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Recorded By	Attributed Staff Name	Identifier
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add Similar</a>	ASQ-3	PAT - Alachua	<a href="#">Fake, Virginia</a>	Participant	Enabled	10/8/2013	10/9/2013	10/8/2013	Fake Staff		
						<a href="#">New</a>					

# Child Record TouchPoints

---

- Select the TouchPoint you wish to Record.

**Take TouchPoint For Virginia Fake**

Select TouchPoint:

-- Select a TouchPoint --

-- Select a TouchPoint --

ASQ-3

ASQ-SE

H.O.M.E Inventory

Health Record

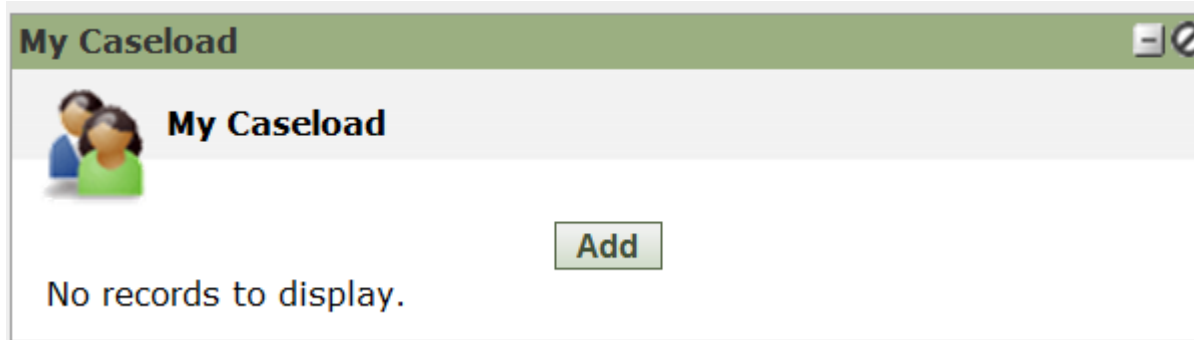
Life Skills Progression (Child)

# My Caseload

---

## Overview

- My Caseload can be used to directly associate a Participant with one or more Staff members.
- An ETO Part on the Home Page is called “My Caseload”. This can be a useful shortcut for staff to easily access the dashboards of Participants on their caseload.



# My Caseload

- After selecting **Add** on the My Caseload part, check the boxes in front of the names that you wish to add to your caseload.
- Select Save.

**Caseload**

**Note:** Once there is an end date on a caseload, the participant will no longer be visible to the caseworker if caseload security enabled, regardless of if the end date is in the future.

Staff: Config Admin

Page size: 10

Page 1 of 1, rows 1 to 2 of 2

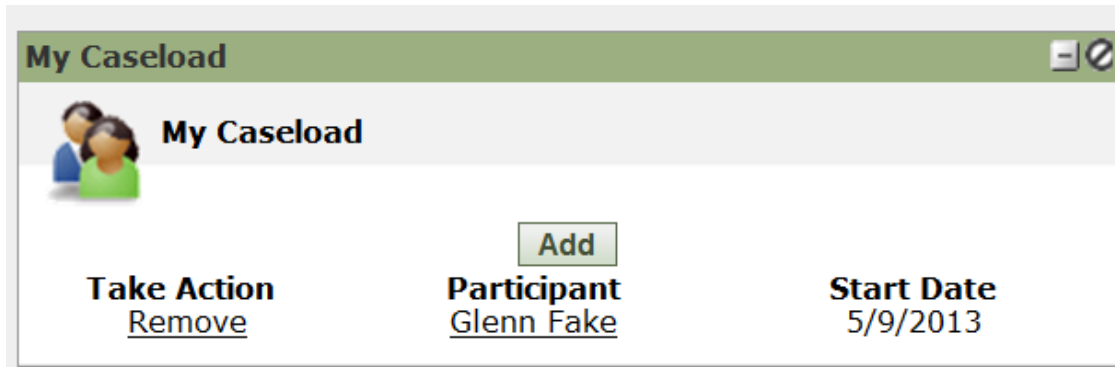
<input type="checkbox"/>	Name	SSN	DOB	Zip Code	Caseworker	Start Date
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Glenn Fake		5/4/1980	21201		<input type="text"/>
<input type="checkbox"/>	Sally Fake		1/1/1990	94596		<input type="text"/>

Page size: 10

Page 1 of 1, rows 1 to 2 of 2

# My Caseload

- Once a participant has been added to your caseload, they will appear in the ***My Caseload*** part on your dashboard.

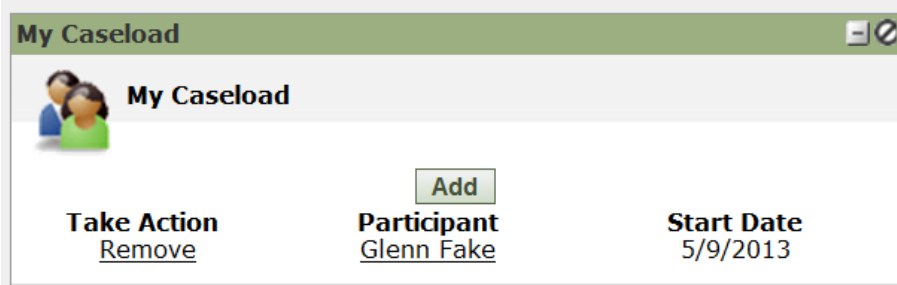


- Your name will appear in the ***My Caseworkers*** part on the Participant's Dashboard.

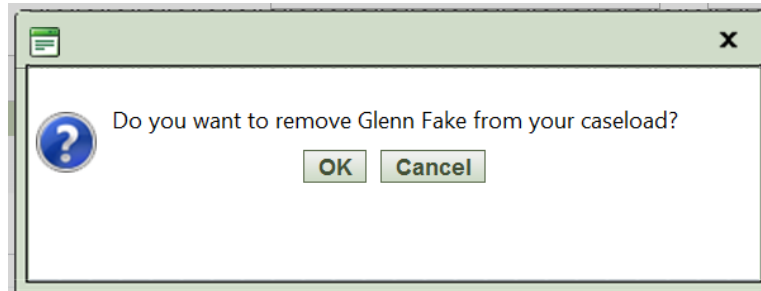


# My Caseload

- To remove a participant from your caseload, select Remove next to their name.



- Select OK .



- Select the Date and Reason they are being removed from your caseload.

Note: there is a known bug in the caseload dismissal reasons. Only the last two options should show:

- 1) Dismissed from program
- 2) Transferred to another worker

The screenshot shows a form titled "Dismiss Participant From Caseload". It has three main fields: "Participant:" with the value "Glenn Fake", "End Date:\*" with the value "5/9/2013" and a calendar icon, and "Dismissal Reason:" with a dropdown menu showing "--Select--". At the bottom, there are two buttons: "Cancel" and "Remove".

- Select Remove.

# Dismiss Participant

---

## When would I dismiss a Participant from a program?

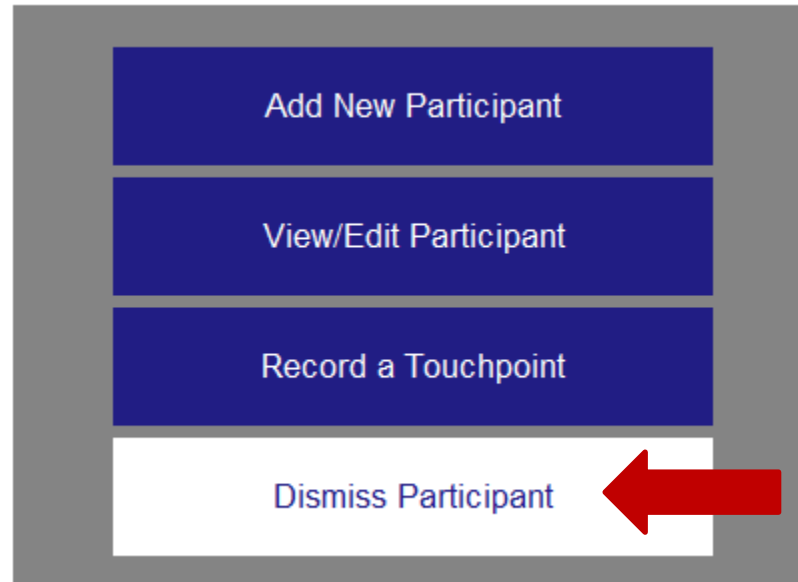
- Dismissal Reasons in ETO (same as PAT Exit Record + two more\*)
  - Completed service cycle
  - Transitioned to another program
  - Moved out of service areas
  - Regularly missed scheduled visits
  - Could not be located
  - Family dissatisfied with PAT
  - Participant no longer Primary Caregiver\*
  - Death of Target Child\*
  - Family left for other reasons
  - Program cut services

# Dismiss Participant

---

- Select Dismiss Participant from the Home Page:

Florida  
Home Visiting  
Information System  
**FLOHVIS**





# Dismiss Participant

- Search for the Participant to be dismissed.
- Check the box in front of their name.
- Select Dismiss Same Date and Reason.

Search for Participants in PAT - Alachua by:

1. (partial) Last Name
2. SSN
3. Case #
4. Family Name

Last Name, SSN, Case #:  First Name:   
Family Name:

 **SEARCH**

- To see **all Participants** leave the boxes empty.
- To search for Participants by (partial) Last Name use the text box to the left.
- To further define your search use the text box to the right.

Showing all Participants matching '**fake**' who are currently enrolled in PAT - Alachua:

☐ Select All Participants

1. ☐ Fake, Mama (DOB: 4/8/1986; SSN: 111-11-1111; Case #: 11467)

# Dismiss Participant

---

- Select the End Date for the Participant
- Select the Dismissal Reason
- Select Dismiss

**Dismiss Participants from Pinellas**

fake, fake

**End Date:** Nov ▾ 27 ▾ 2013 ▾ yesterday

**Dismissal Reason:** --Select--

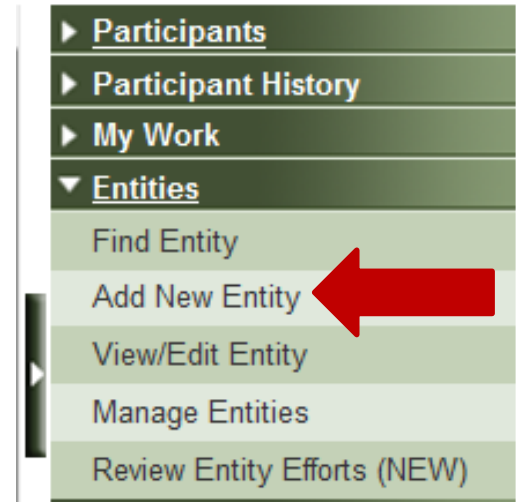
**Successfully Completed:**

- Completed service cycle
- Transitioned to another program
- Moved out of service area
- Regularly missed scheduled visits
- Could not be located
- Family dissatisfied with PAT
- Family left for other reasons
- Program cut services

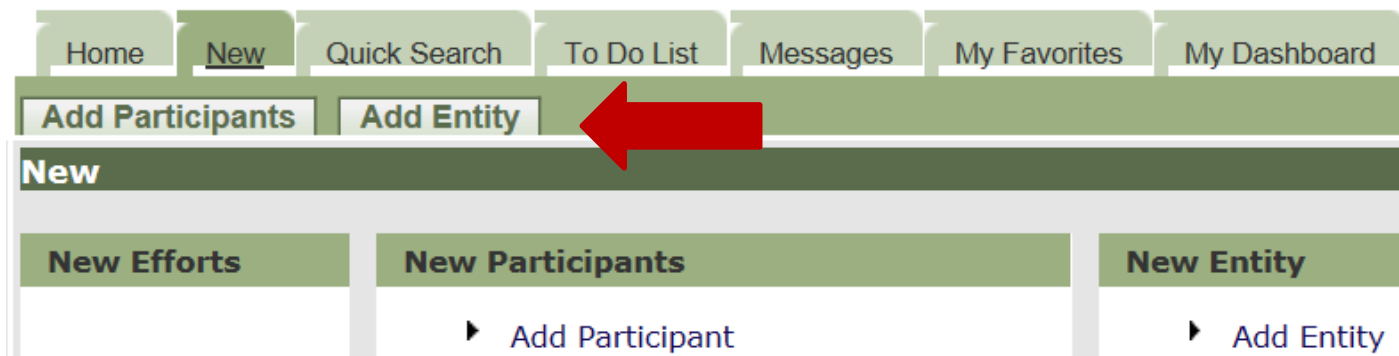
# Add Entity

Entities are added into ETO using the **Add Entity** feature:

- One option is located on the Navigation Bar:



- Another option is located in the **New** tab on the Quick Search Bar at the top of the Home Page:



# Add Entity

- After entering the Entity Name, you must also select the Entity Type, which will ALWAYS be **Service Providers**. Complete any other field that you have the data for.

**Add New Entity:**

<b>Entity Name:</b>	<input type="text"/>	
<b>Entity Type:</b>	<div><div>Funding Source</div><div>--Select-- Administrative Billing Provider Businesses Classes Education Institution Employer Funding Source Individuals Property Referral Source Service Providers Vendor</div></div>	<b>Address 1:</b> <input type="text"/>
<b>Is an Individual:</b>		<b>Address 2:</b> <input type="text"/>
<b>Phone Number:</b>		<b>Zip Code:</b> <input type="text"/>
<b>Enterprise Level:</b>		

[Copy Business Address](#)

<b>Title:</b>	<input type="text"/>	<b>Address 1:</b>	<input type="text"/>
<b>Prefix:</b>	--Select--	<b>Address 2:</b>	<input type="text"/>
<b>First Name:</b>	<input type="text"/>	<b>Zip Code:</b>	<input type="text"/>
<b>Middle Name:</b>	<input type="text"/>	<b>Email:</b>	<input type="text"/>
<b>Last Name:</b>	<input type="text"/>		
<b>Suffix:</b>	--Select--		

**Notes:**

# Add Entity

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- Add any notes about the Entity that may be helpful to you or your staff.
- Select Add Entity to the System to create a new record for the Entity.

**Entity Notes:**

**Add Entity to the System**

# Add Entity

---

Let's Add an Entity.

1. Select Add Entity.
2. Start whatever name you choose with "Fake". (Example- "Fake Florida Medical Center")
3. Select ***Service Provider*** as the Entity Type.
4. Select Add Entity to the System.

# View/Edit Entity

- Updates to Entities are made using the **View/Edit Entity** feature, located in the navigation bar or Quick Search Bar.
- Search for the Entity by Name.
- Click on the name of the entity.

**View/Edit Entity**  
Search by (partial) **Entity Name, Entity Type, Sub-Type or Contact Last Name:**

To see **all Entities** leave the box empty.

**View/Edit Entity**  
Search by (partial) **Entity Name, Entity Type, Sub-Type or Contact Last Name:**

To see **all Entities** leave the box empty.

---

Entity Name	Show Entity Type	Show Contact Info
Matches for: <b>All Entities</b>		
Fake Entity	Show Entity Type	
Fake Entity 1	Show Entity Type	

# View/Edit Entity

- Make updates to the Entity and then select Update.
- Click Entity Type or Subtype to update these fields.

**View/Edit Entity** **Enabled** > **Disable** **View Fake Entity's Dashboard** **Program Information**

**Entity Name:**

**Entity Types:**

**Entity Sub-Types:**

**Phone Number:**

**Address 1:**

**Address 2:**

**Is an Individual:** ☐

**Zip Code:**

**Enterprise Level:** ☐

**Contact Info:** [Add New Contact](#) | [Add Existing Contact](#)

**Entity Notes:**



# Internal Support

## Florida ETO Administrator Contact information

If you have questions about  
using and navigating  
FLOHVIS, please contact  
your ETO Administrator:

Virginia Holland  
[FLOHVIS@fahsc.org](mailto:FLOHVIS@fahsc.org)

# Contacting Social Solutions Support

- Your TouchPoint won't save?
- Your report won't open?
- You're getting a weird error message?
- What should you do?

**Social Solutions Support**

**Phone: 866.732.3560 Ext.2**

**Email:  
support@socialsolutions.com**

**Hours:**

**Mon-Thu 8am-8pm EST, Fri  
8am-6pm EST**