



Clients



Group  
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Help

Log off

Clicking on the "Clients" icon routes to the All Clients page where you can add a new client or search for an existing client.

## Evaluation of Employment Coaching for TANF and Related Populations

Welcome message

OMB#:

Expiration Date:

### THE PAPERWORK REDUCTION ACT OF 1995

Public reporting burden for this collection of information is estimated to average 20 minutes when conducting a baseline intake and an average of 2 minutes when updating client information, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor data collection, and a person is not required to respond to a collection of information, unless it displays a currently valid OMB control number. The information requested in this template will be used to document how programs operate. The data gathered will allow ACF to better monitor progress and performance.



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[All Clients](#)[My Clients](#)[+ Add Client](#)

Search Criteria

Site Client ID: Last Name: Middle Name: First Name: Sub-site Coach: Case Manager: Enrollment Date:  Client Status: RA Result Items per page 

Client ID	Last Name	First Name	Sub-site	Coach	Case Manager	Enrollment Date	Client Status	RA Result
<a href="#">1111</a>	Adams	Lurch	Northside	J. Smith	F. Flintstone	4/24/2015	Enrolled	Coaching
<a href="#">2222</a>	Adams	Gomez	Central City	Unassigned	Unassigned	5/15/2015	Enrolled	NO Coaching
<a href="#">3333</a>	Adams	Morticia	Uptown				Pending Dup	

[1](#) [2](#) [3](#) [>>](#)

3 Record(s)

Users within a site will only be able to see the clients enrolled at their site and as a result they will not see the "Site" drop down menu. Researchers and agency staff will be able to see all clients across sites and will have access to the "Site" drop down menu.

The "All Clients" and "My Clients" hyperlinks can be used to toggle between a screen used to search for a client and a screen that displays staff members' individual client lists.

Clicking on a client ID in the search results will route you to their client profile where you can schedule case management and coaching meetings and manage other client-specific data.

## C3. My Clients List



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[All Clients](#)

My Clients

Client ID	Last Name	First Name	Sub-site	Coach	Case Manager	Enrollment Date	Client Status	RA Result	Eligibility Criteria
1111	Adams	Lurch	Northside	J. Smith	F. Flintstone	4/24/2015	Enrolled	Coaching	Eligibility criteria 1
2222	Jones	David	Central City	J. Smith	Unassigned	5/15/2015	Enrolled	NO Coaching	Eligibility criteria 2
3333	Tell	William	Uptown	J. Smith	S. Potter	5/29/2015	Enrolled	Coaching	Eligibility criteria 3

*3 assigned client(s)*



This page is reached by selecting "Add client"  
from "All Clients-Search" screen

## INTAKE Step 1 - Eligibility

First Name

Middle Name

Last Name

{Program Name} ID#:

This item was added in March 2018 so we can link the study ID  
with the program's ID number.

### ELIGIBILITY

Eligibility criteria 1  Yes  No

Eligibility criteria 2  Yes  No

Eligibility criteria 3  Yes  No

Eligibility criteria will be specific to  
each site/program in the evaluation.  
Examples of eligibility criteria might  
include age, pathway or employment  
status.

Save & Exit

Save & Continue



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## Intake Step 2 - Consent

First Name

Middle Name

Last Name

### CONSENT

Consent language from baseline questionnaire

Does client agree to participate in the Evaluation of Employment Coaching for TANF and Other Low-Income Populations?

Yes  No

Save & Exit

Save & Continue

When Consent = Yes, 'Save & Continue' button launches baseline questionnaire



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### Intake Step 3 - Conduct Baseline

First Name

Middle Name

Last Name

The baseline questionnaire (see Attachment B) launches in a different software but will have a similar look and feel to the RAPTER system.

Save & Exit

Save & Continue



## Intake Step 4 - Additional Information

Today's Date: mm/dd/yyyy

Client ID:

Name:

Date of Birth:  (mm)  (dd)  (yyyy)

SSN:  (XXX)  (XX)  (XXXX)

Gender:

Sub-Site:

Pre-filled from baseline questionnaire

Where was the intake process conducted?

- Program office  
 Applicant's home  
 Other location

New question about the location of the intake was added in March 2018 to account for FaDSS' intake procedures.

How was the client referred to the program? *Mark all that apply.*

- Program's intake or outreach staff  
 Program's partner agency  
 Other community agency  
 Employer  
 Current student  
 Word of mouth (other)  
 Advertisement, flyer, or other public announcement  
 Client does not remember  
 Other (please specify)

Based on any information collected on the applicant that you believe is relevant and your own

The client will show up for any coaching sessions?

- Very likely   
  Somewhat likely   
  Somewhat unlikely   
  Very unlikely

The client will attend at least 4 coaching sessions?

- Very likely   
  Somewhat likely   
  Somewhat unlikely   
  Very unlikely

**Randomly Assign Client**

Cancel

Save



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This page displays after attempting to RA a case that is already matched to a case in the system.

## Possible Duplicate Found



Client ID

DOB

SSN

*New client matches the following existing client record(s):*

Client ID	Last Name	First Name	Sub-site	Case Manager(s)	Intake Date	Client Status
7777	Bradley	Milton Hershey	North	Penny Lane	mm/dd/yyyy	Active





The tabs will display depending on the type of user. For example, only coaches will have access to the coaching tab. Case managers will not see the coaching tab. Clicking on the tabs allows staff to enter and manage client data related to the topic displayed.

The Client Profile will display for clients in the no coaching group if the site has services other than coaching that they are tracking. If there are services to track, the client profile for the no coaching group will display as shown, but without the coaching tab.

Client First Name Client Last Name (Client ID xxxxxxxx)

*Client has been RA'd successfully!*

Message displays random assignment outcome upon successful completion of the RA process.

Profile | Service History | Coaching | Work Experience

**Program Information** [Edit](#)

Enrollment: mm/dd/yyyy

RA Result: Coaching

Client Status: Active

Status Change Date: mm/dd/yyyy

**Assigned Staff** [Edit](#)

Case Manager: First Name Last Name

Coach: First Name Last Name

Clicking on the Edit button routes to the "Assign Program Staff" screen where you can assign a coach or case manager or change the coach/case manager assignment depending on the user's permission level.

**Client Information** [Edit](#)

Sub-site:

Date of Birth:

Contact Info

Phone

Email

Address

+ Addl Contacts

Pre-filled from baseline questionnaire

**Service Summary** [Schedule Case Mgmt Meeting](#)

Type	# Provided	Most Recent	Next Scheduled
Case Management Contacts	12	6/8/2015	6/30/2015
Referrals	3	5/3/2015	-
Incentives	1	6/1/2015	-

**Coaching Summary** [Schedule Coaching Session](#)

Type	# Provided	Most Recent	Next Scheduled
Coaching Sessions	1	6/12/2015	6/18/2015
Referrals	1	6/12/2015	-

**Group Activities Summary**

Type	Attendance Required	Attended?	Date
Training 1	Y	Y	6/18/2015
Workshop 1	N	N	6/12/2015

Client First Name Client Last Name (Client ID xxxxxxxx)

Choose a case manager

Select Case Manager ▼

Choose a coach

Select Coach ▼

Cancel


Save

C11a. Schedule Coaching Session

Client First Name Client Last Name (Client ID xxxxxxxx)

Date:  

Time:

Location:  

Cancel


Save

C11b. Schedule Case Management Meeting

Client First Name Client Last Name (Client ID xxxxxxxx)

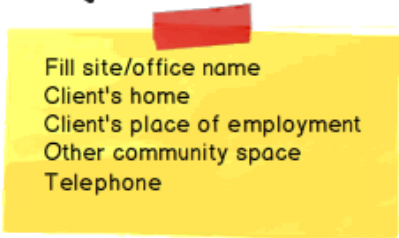
Date:  

Time:

Location:  

Cancel

Save



Fill site/office name  
Client's home  
Client's place of employment  
Other community space  
Telephone



Client First Name Client Last Name (Client ID xxxxxxxx)

Profile Service History Coaching Work Experience

Upcoming  
Update Needed  
Cancelled  
Completed

Case Management +Add Session

Status:  Items per page

Select Session	Location	Mode	Status	Action
Mon 5/23/2015 - 8:00 pm	Client's home	In person	Upcoming	<input type="button" value="Cancel"/> <input type="button" value="Reschedule"/>
Mon 5/16/2015 - 8:00 pm	Client's home	In person	Update Needed	<input type="button" value="Cancel"/> <input type="button" value="Record"/>
Mon 5/2/2015 - 8:00 pm	Client's employment	Phone	Cancelled	<input type="button" value="Reinstate"/> <input type="button" value="View/Edit"/>
Th 4/20/2015 - 7:30 pm	Client's home	In person	Completed	<input type="button" value="Cancel"/> <input type="button" value="View/Edit"/>

1 2 3 >>

X Record(s)

If contact takes places on the telephone, the location is coded telephone.

"Cancel" opens Cancel session screen.  
 "Reinstate" restores previously cancelled session.  
 "Record" opens record case management session screen.  
 "View/Edit" opens either:  
 - record case management session screen for completed session OR  
 - cancel session screen for cancelled sessions.  
 "Reschedule" opens Cancel/Reschedule session screen.

Incentives + Add Incentive

Date Provided	Data Entered By	Incentive Type	Value	Incentive Reason
5/23/2015	J.Swanson	Gift Card	\$10	Workshop completion
5/2/2015	JSwanson	Bus Pass	\$25	Attended four sessions
4/20/2015	H. Hughes	Food voucher	\$20	Attended first session

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3 Record(s)



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Client First Name Client Last Name (Client ID xxxxxxxx)

Profile

Service History

Coaching

Work Experience



Upcoming  
Update Needed  
Cancelled  
Completed

Coaching

+Add Session

Status: Items per page 

Select Session	Location	Mode	Status	Action	
Mon 7/7/2015 - 8:00 pm	Client's home	In person	Upcoming	<input type="button" value="Cancel"/>	<input type="button" value="Reschedule"/>
Mon 6/30/2015 - 8:00 pm	Client's employment	Phone	Update Needed	<input type="button" value="Cancel"/>	<input type="button" value="Record"/>
Th 6/26/2015 - 7:30 pm	Client's home	In person	Completed	<input type="button" value="Cancel"/>	<input type="button" value="View/Edit"/>
Fr 6/21/2015 - 8:00 pm	Client's home	In person	Cancelled	<input type="button" value="Reinstate"/>	<input type="button" value="View/Edit"/>
Fr 6/14/2015 - 8:00 pm	Client's home	In person	Completed	<input type="button" value="Cancel"/>	<input type="button" value="View/Edit"/>





X Record(s)

Client First Name Client Last Name (Client ID xxxxxxxx)

Scheduled Session Date: Who initiated cancellation/rescheduling?  Client  Coach

When did the client cancel/reschedule?

Cancellation/Reschedule notice

 ▼  
 More than a day  
 Same day  
 No show/no notice

Reason for cancelling/rescheduling

 ▼  
 Transportation  
 Child care  
 Sick  
 Employment  
 Weather  
 No excuse provided

New session

Similar screen will be used for Cancelling/Rescheduling Case Management Meeting.

Displayed/Required when Client initiates cancellation/rescheduling

New session date displayed/required when EITHER Client OR Coach reschedule

Add/Edit Coaching Session X

Client First Name Client Last Name (Client ID xxxxxxxx)

Session Date:

Was the client late to the session?  Yes  No If yes, how late?

5-10 minutes  
11-15  
16-30  
More than 30

How long was the session?

Session Location:

Mode of Session:  Phone  Group  
(mark all that apply)  In-Person  Other (please specify):

What methods were used in this session? (mark all that apply)

- Assessments
- Development of action steps
- Discussion of incentives
- Goal setting
- Assignments
- Other (please specify):

Fill Site/Office Name  
Client's home  
Client's place of employment  
Other community space  
Telephone

Less than 5 minutes  
5 minutes-15 minutes  
16 minutes-30 minutes  
31 minutes-45 minutes  
46 minutes-60 minutes  
61 minutes-90 minutes  
91 minutes-120 minutes  
Over 120 minutes

Choose the topics that you went over in the session (mark all that apply)

**Work Readiness**

- Child care
- Education
- Interviews
- Job openings
- Problems on the job
- Resume
- Training
- Transportation
- Work requirements
- Stress reduction
- Other (please specify):

**Personal Supports**

- Basic Needs
- Budgets
- Child behavior
- Domestic Violence
- Family relationships
- Financial Literacy
- Housing
- Legal
- Physical Health
- Mental Health
- Substance Abuse
- Other (please specify):

Goals discussed during session

Was a new assignment given to the client?  Yes  No

Did the client complete their assignments prior to this session?  Completely  Partly  Not at all  N/A

Did the case manager contact the referral agency?  Yes  No

Choose the type of referral that was made to the client

These questions will display when user clicks 'Add Referral' button  
May document multiple referrals by clicking 'Add Referral' button for each referral to be entered

Basic needs  
Child behavioral issues  
Child care  
Clothes, uniforms, tools  
Domestic violence  
Family relationships  
Financial counseling  
Legal advice, record expungement  
Mental health  
Physical health  
Stable housing  
Stress reduction  
Substance abuse treatment  
Transportation  
Tuition assistance  
Other

Add/Edit Case Management Session X

Client First Name Client Last Name (Client ID xxxxxxxx)

Session Date:

Was the client late to the session?  Yes  No If yes, how late?

5-10 minutes  
11-15  
16-30  
More than 30

How long was the session?

Session Location:

Mode of Session:  Phone  Group  
(mark all that apply)  In-Person  Other (please specify):

Less than 5 minutes  
5 minutes-15 minutes  
16 minutes-30 minutes  
31 minutes-45 minutes  
46 minutes-60 minutes  
61 minutes-90 minutes  
91 minutes-120 minutes  
Over 120 minutes

Choose the topics that you went over in the session (mark all that apply)

**Work Readiness**

- Child care
- Education
- Interviews
- Job openings
- Problems on the job
- Resume
- Training
- Transportation
- Work requirements
- Stress reduction
- Other (please specify):

**Personal Supports**

- Basic Needs
- Budgets
- Child behavior
- Domestic Violence
- Family relationships
- Financial Literacy
- Housing
- Legal
- Physical Health
- Mental Health
- Substance Abuse
- Other (please specify):

Fill Site/Office Name  
Client's home  
Client's place of employment  
Other community space  
Telephone

Did the case manager contact the agency to which the client was referred?  Yes  No

Choose the type of referral that was made to the client

These questions will display when user clicks 'Add Referral' button  
May document multiple referrals by clicking 'Add Referral' button for each referral to be entered

Basic needs  
Child behavioral issues  
Child care  
Clothes, uniforms, tools  
Domestic violence  
Family relationships  
Financial counseling  
Legal advice, record expungement  
Mental health  
Physical health  
Stable housing  
Stress reduction  
Substance abuse treatment  
Transportation  
Tuition assistance  
Other



## Incentive

Client First Name Client Last Name (Client ID xxxxxxxx)

Date Provided: Type of incentive: Reason for incentive: 

Completed assignment  
Completed a goal  
Met with coach more than X number of times  
Other (please specify):

Bus pass or gas card  
Gift Card  
Products  
Food Voucher  
Other (please specify):

Value:



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[Help](#)  
[Contact Us](#)

Client First Name Client Last Name (Client ID xxxxxxxx)

## Work Experience

Work Experience

Select	Start Date	EndDate	Employer	Position
<input type="radio"/>	4/15/13		Walgreens	Stock Clerk
<input type="radio"/>	4/24/12	3/30/13	McDonald's	Cashier

View/Revise

Add

Employer:

Street:

City:  State:  Zip Code:

County:

Position (title):

Supervisor:

Supervisor's Phone:

Employment Status:

- full-time  
 part-time

Employment subsidy:  Yes  No

Employment subsidy amount:

Unit:

Hours per week:

Pay from employer:

Start Date:

End Date:   Reason employment ended:

Cancel

Save

Per hour  
Per day  
Per week

Employment terminated by the employer (client performance issues)  
 Employment terminated by the employer (business/organizational issues)  
 Employment terminated by the client  
 Employment opportunity ended as planned



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## Group Activity Listing

[Add New Activity](#)

Search Criteria

Date:



Location:

Name of Activity:

[Search](#)[Clear Criteria](#)

Staff can create group activities for trainings, workshops, or other activities that take place at the program.

Search Results

Date	Name of Activity	Location
05/23/2015	Activity 1	Location 1
06/14/2015	Activity 2	Location 2

[View](#)



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## Record Group Activity

### Activity Information

Date:



Location:

Name of Activity:

For first time recording, top fields are blank.  
To edit existing group activity, top fields as well as Clients in this activity grid are populated upon opening screen.

### Clients

#### Potential Clients

Select	Last Name	First Name.MI	Client ID
<input type="checkbox"/>	Adams	Lurch.X	1234
<input type="checkbox"/>	Bunker	Archie	3517
<input type="checkbox"/>	Fonzarelli	Arthur.Y	2245

#### Clients in this activity

Select	Last Name	First Name.MI	Client ID
<input type="checkbox"/>	Jones	Mary	3645
<input type="checkbox"/>	Watson	Bill	4785



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Site

Select Site

Sub-site

Select Sub-site

Users

Add User

Items per page 10

Select	Last Name	First Name	User Type	User Name	Site	Sub-site	Active Ind
<a href="#">View</a>	Smith	Tom	Case Manager	Tsmith@abc.com	TANF A	Maple St	Y
<a href="#">View</a>	Jones	Dick	Case Manager	Djones@abc.com	Site B		Y
<a href="#">View</a>	Adams	Harry	Coach	Hadams@xyz.com	TANF C	Somerset	Y

1

2

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&gt;&gt;

x Record(s)

## U2. Add User/Edit User



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First Name:

Last Name:

User Name:  *(Enter email address (bsmith@xyz.com))*

Phone:

Authentication Method:

User Type:

Site:

Sub-site:

Permission(s):  Permission 1  
*Select All that Apply*  Permission 2  
 Permission 3  
 Permission 4

Permissions will be used to control additional screens and/or functionality. The permissions settings will be used in conjunction with user type to tailor functionality to what is needed for each user.

Site-level supervisors will create accounts for their staff using this screen and assign the appropriate user types and permission levels so that staff are only able to view clients who are part of their caseload.

Email  
Text Message

Site Administrator  
Case Manager  
Coach  
General

Cancel

Save



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**Operational Reports** *(Select report)*

[Report #1](#)

[Report #2](#)

[Report #3](#)

[Report #4](#)

[Report #5](#)

Reports will be generated from data previously entered in the system.



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Parameter Selection

Parameter 1: Parameter 2: Parameter 3: [View Report](#)**Report Output**