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

C1. Home Page

Clients | Group Activities | Reports | Settings | Help

Log off

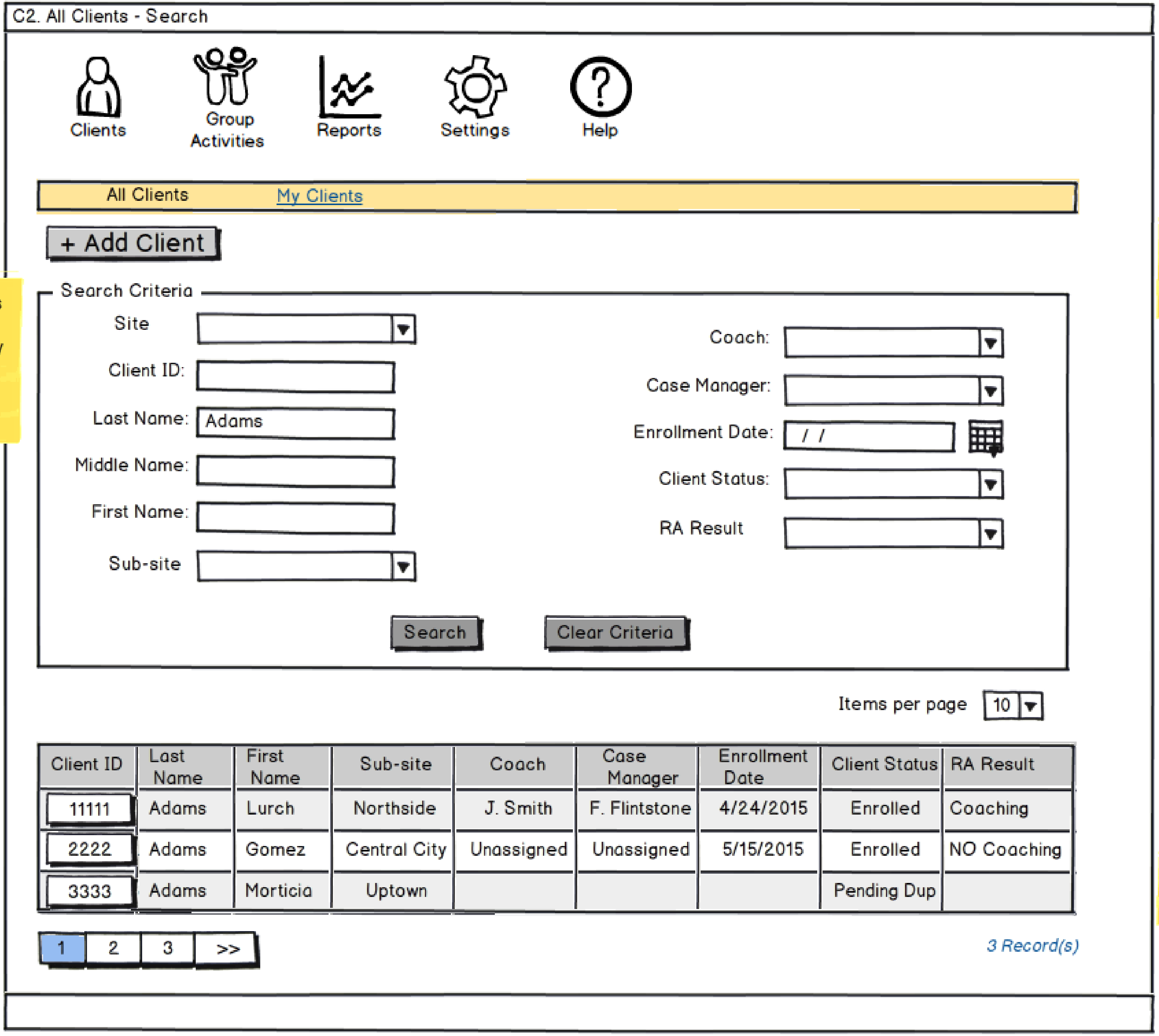
Evaluation of Employment Coaching for TANF and Related Populations

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.

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

Clients

Group Activities

Reports

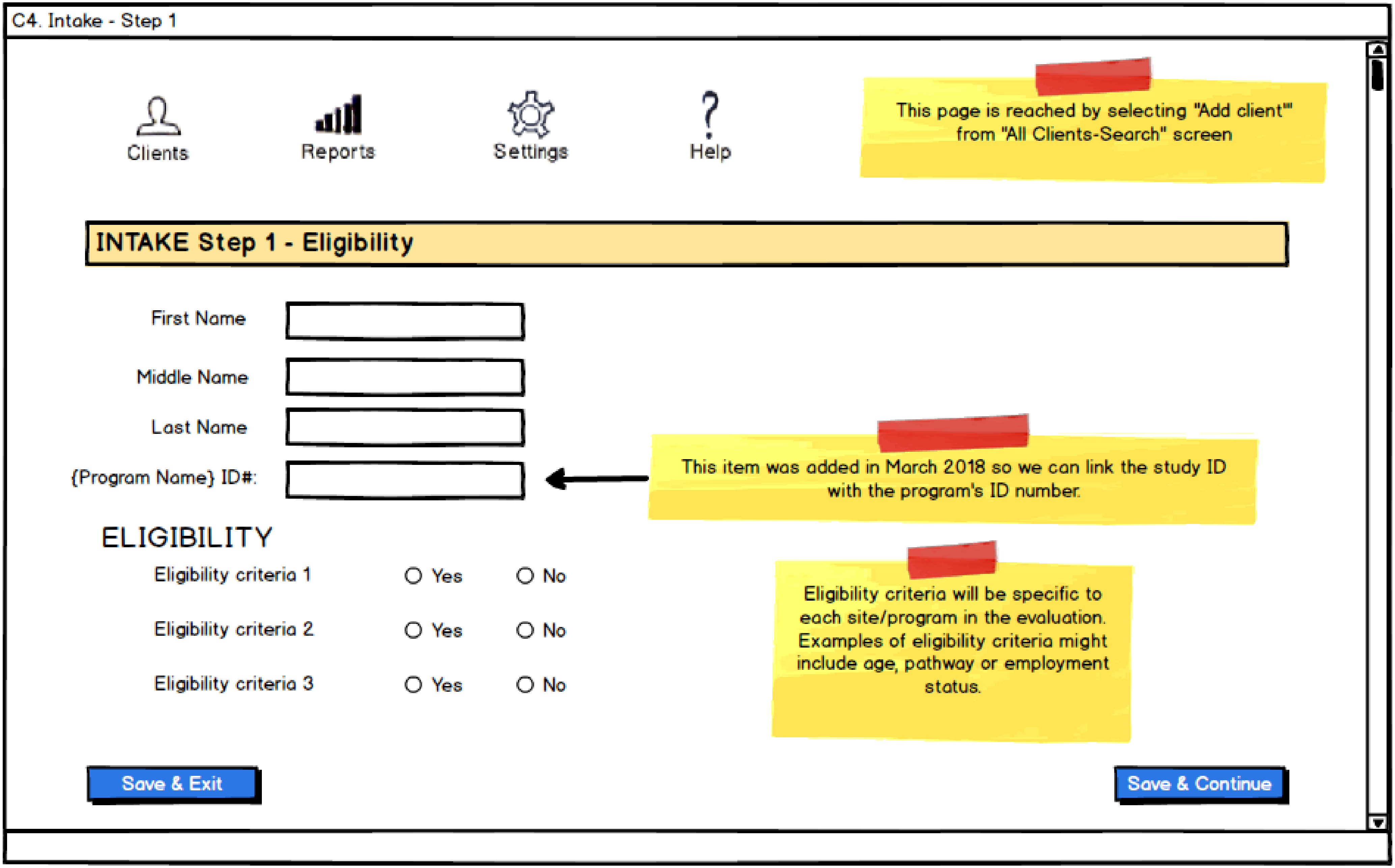
Settings

Help

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)


C4. Intake - Step 1
Clients
Reports
Settings
Help
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

C5. Intake - Step 2

Clients
Group Activities
Reports
Settings
Help

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?

O Yes O No

Save & Exit

Save & Continue

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

C6. Intake - Step 3

Clients

Group Activities

Reports

Settings

Help

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

C7. Random Assignment - Addl Information

Clients

Reports

Settings

Help

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:

Pre-filled from baseline questionnaire

Sub-Site: Select...

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

C8. Duplicate

Clients

Group Activities

Reports

Settings

Help

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

Possible Duplicate Found

Last Name, First Name Middle Name

Edit

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

Save pending resolution

Allow Client

Duplicate Confirmed

C9. Client Profile

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.

Clients | Group Activities | Reports | Settings | Help

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.

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

Client First Name Client Last Name (Client ID xxxxxxxx)

Client has been RA'd successfully!

Profile | Service History | Coaching | Work Experience

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.

Program Information

Edit

Enrollment mm/dd/yyy

RA Result: Coaching

Client Status: Active

Status Change Date: mm/dd/yyy

Client Information

Edit

Sub-site:

Date of Birth:

Contact Info

Phone

Email

Address

+ Addl Contacts

Pre-filled from baseline questionnaire

Assigned Staff

Edit

Case Manager: First Name Last Name

Coach: First Name Last Name

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	-

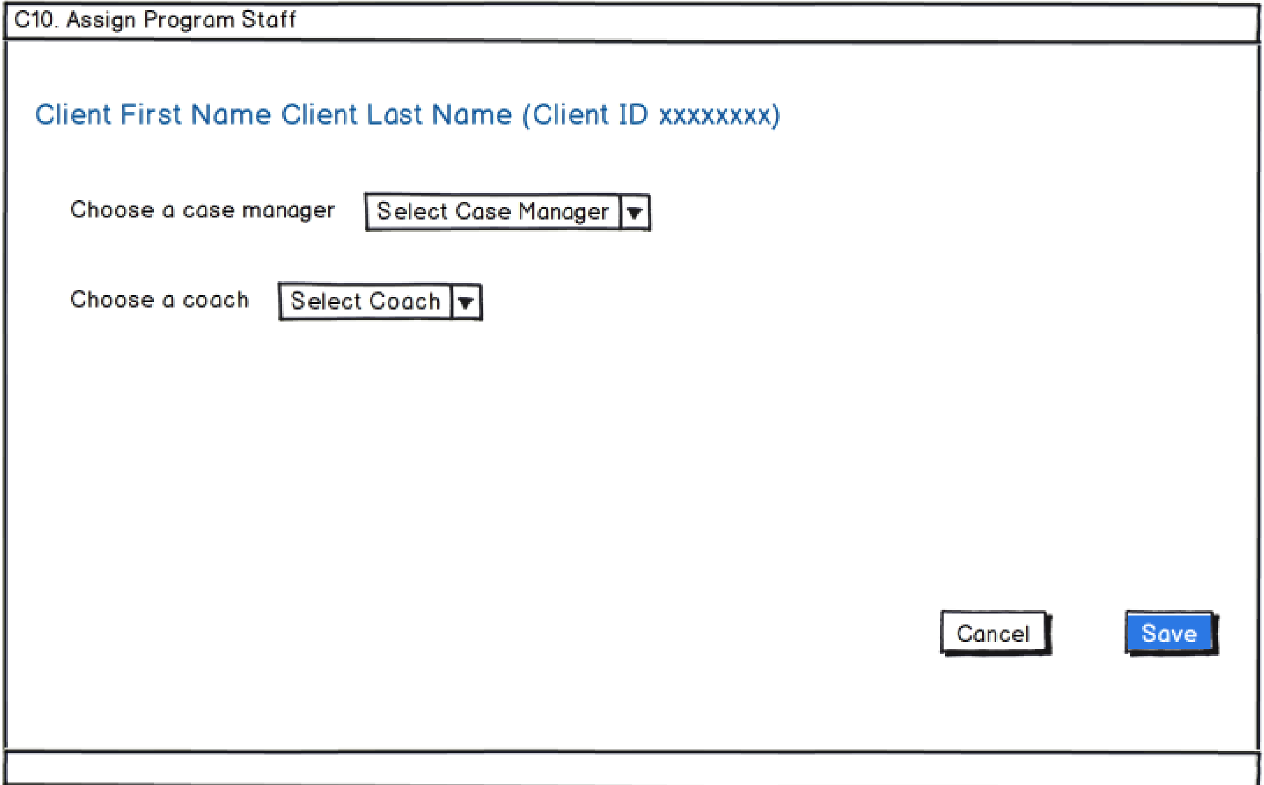
Coaching Summary

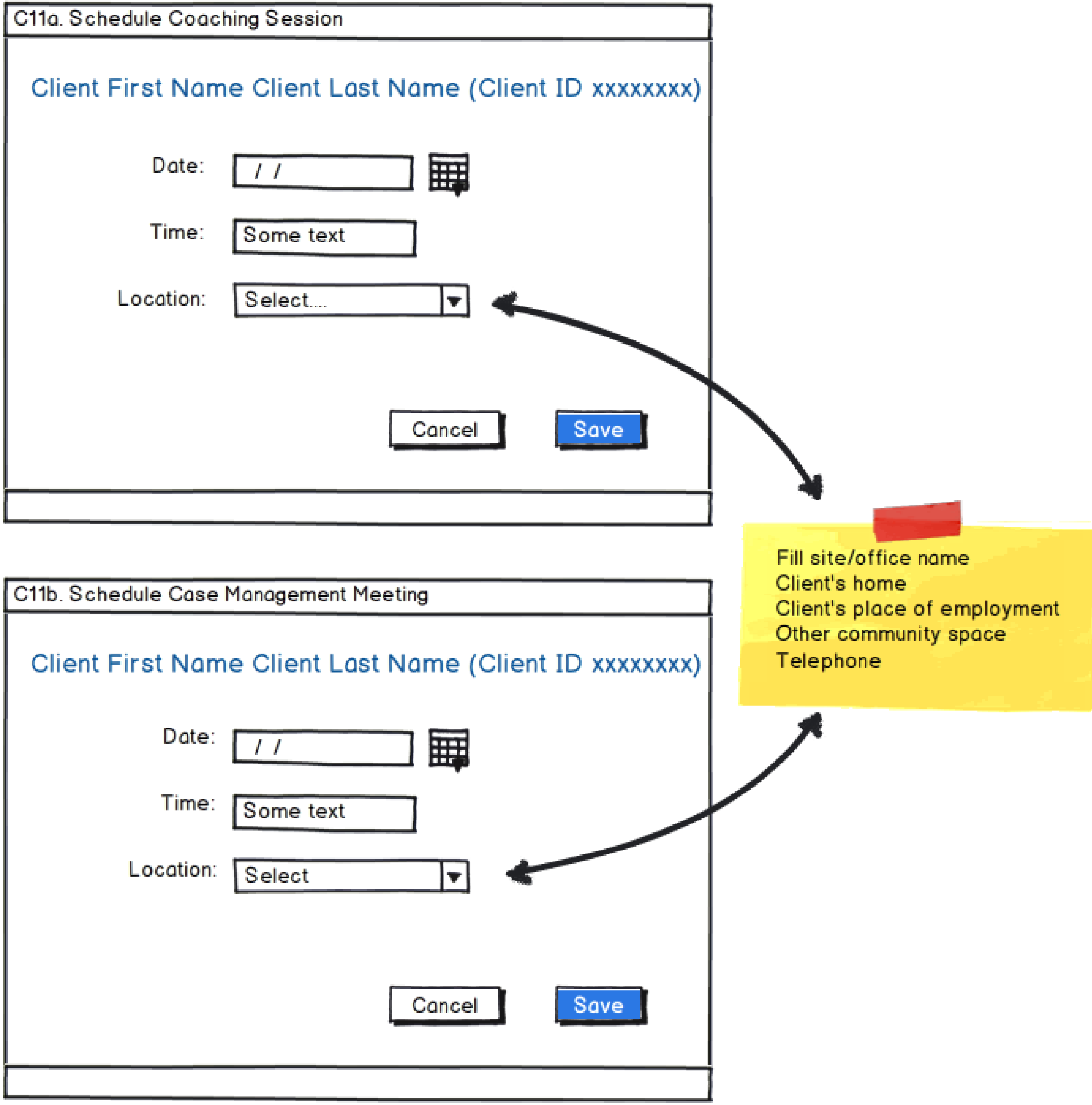
Schedule Coaching Session

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


C10. Assign Program Staff
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:
Some text
Location:
Select....
Cancel
Save
Fill site/office name
Client's home
Client's place of employment
Other community space
Telephone
C11b. Schedule Case Management Meeting
Client First Name Client Last Name (Client ID xxxxxxxx)
Date:
/ /
Time:
Some text
Location:
Select
Cancel
Save

C12. Service History

Clients | Group Activities | Reports | Settings | Help

Client First Name Client Last Name (Client ID xxxxxxxx)

Profile | Service History | Coaching | Work Experience

Case Management

+Add Session

Upcoming
Update Needed
Cancelled
Completed

Status: Select... Items per page 10

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

1 2 3 >>

3 Record(s)

C13. Coaching

Clients Group Activities Reports Settings Help

Client First Name Client Last Name (Client ID xxxxxxxx)

Profile | Service History | Coaching | Work Experience

Upcoming
Update Needed
Cancelled
Completed

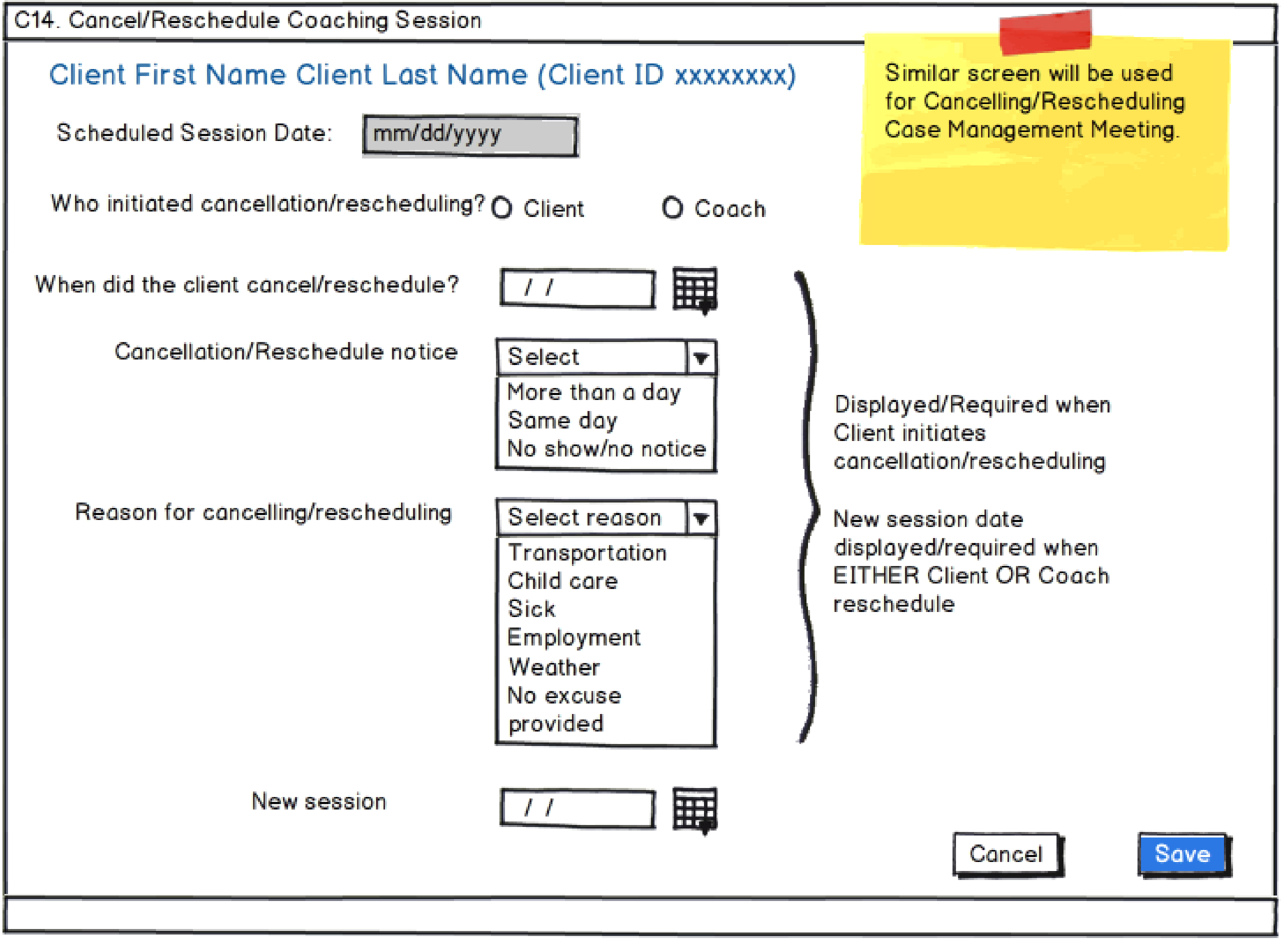
Coaching +Add Session

Status: Select... Items per page 10

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

1 2 3 >>

X Record(s)


C14. Cancel/Reschedule Coaching Session
Client First Name Client Last Name (Client ID xxxxxxxx)
Similar screen will be used for Cancelling/Rescheduling Case Management Meeting.
Scheduled Session Date:
mm/dd/yyyy
Who initiated cancellation/rescheduling?
Client
Coach
When did the client cancel/reschedule?
/ /
Cancellation/Reschedule notice
Select
More than a day
Same day
No show/no notice
Displayed/Required when Client initiates cancellation/rescheduling
Reason for cancelling/rescheduling
Select reason
Transportation
Child care
Sick
Employment
Weather
No excuse provided
New session date displayed/required when EITHER Client OR Coach reschedule
New session
/ /
Cancel
Save

C15. Record Coaching Session

Add/Edit Coaching Session X

Client First Name Client Last Name (Client ID xxxxxxxx)

Session Date: 3/21/2017

Was the client late to the session? O Yes O No

If yes, how late? Select

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

How long was the session? Select

Session Location: Select

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

Mode of Session: (mark all that apply)
- ☐ Phone
- ☐ Group
- ☐ 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

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? O Yes O No

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

+Add Referral

Did the case manager contact the referral agency? O Yes O No

Choose the type of referral that was made to the client: Select referral

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

Cancel Save

C16. Record Case Management Session

Add/Edit Case Management Session X

Client First Name Client Last Name (Client ID xxxxxxxx)

Session Date: 3/21/2017

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

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

How long was the session? Select ▾

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

Session Location: Select ▾

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

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

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): ____

+Add Referral

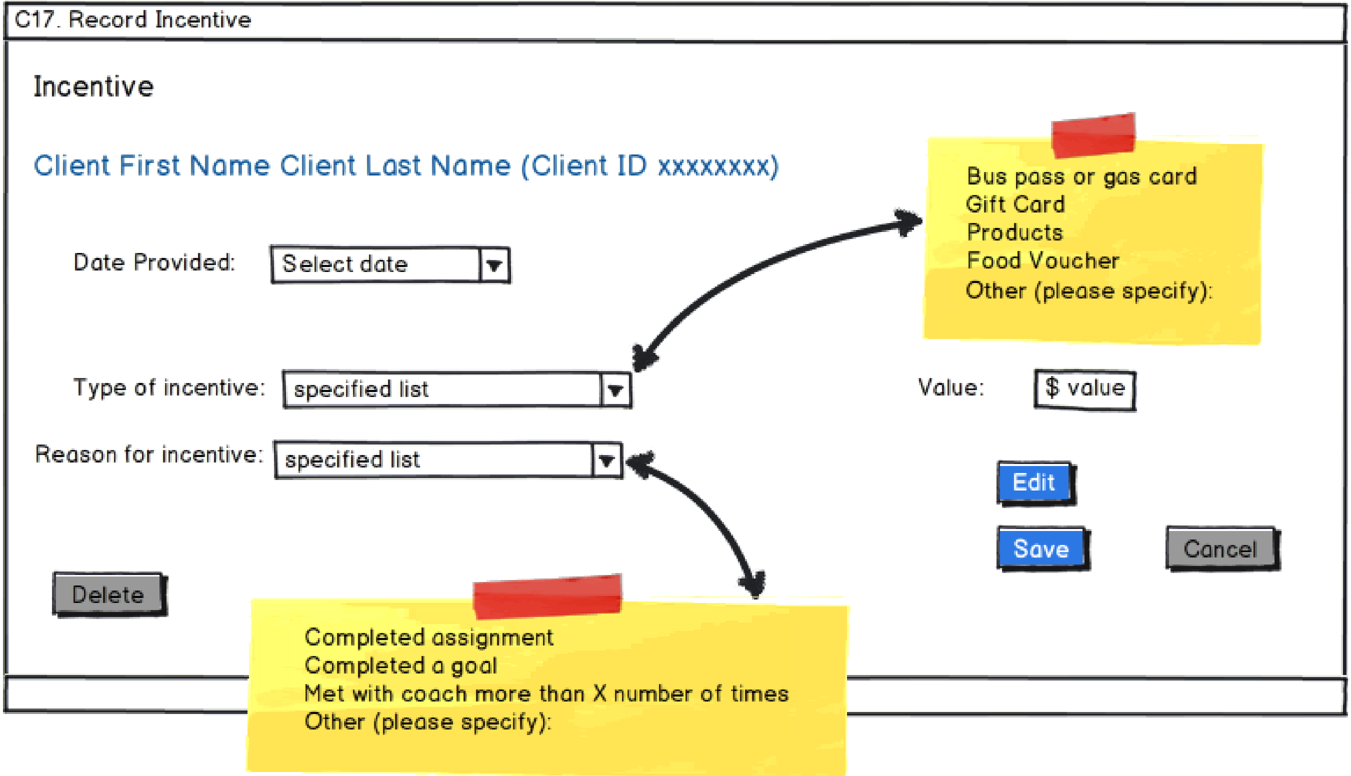
Did the case manager contact the agency to which the client was referred? ○ Yes ○ No

Choose the type of referral that was made to the client Select referral ▾

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

Cancel Save



C17. Record Incentive
Incentive
Client First Name Client Last Name (Client ID xxxxxxxx)
Date Provided:
Select date
Type of incentive:
specified list
Reason for incentive:
specified list
Bus pass or gas card
Gift Card
Products
Food Voucher
Other (please specify):
Value:
$ value
Edit
Save
Cancel
Delete
Completed assignment
Completed a goal
Met with coach more than X number of times
Other (please specify):

C18. Record Employment/Work Experience

Help
Contact Us

Clients | Group Activities | Reports | Settings | Help

Client First Name Client Last Name (Client ID xxxxxxxx)

Work Experience

Work Experience

Select	Start Date	EndDate	Employer	Position
O	4/15/13		Walgreens	Stock Clerk
O	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: O Yes O No

Employment subsidy amount: $ amount

Unit: Select...

Per hour
Per day
Per week

Hours per week:

Pay from employer:

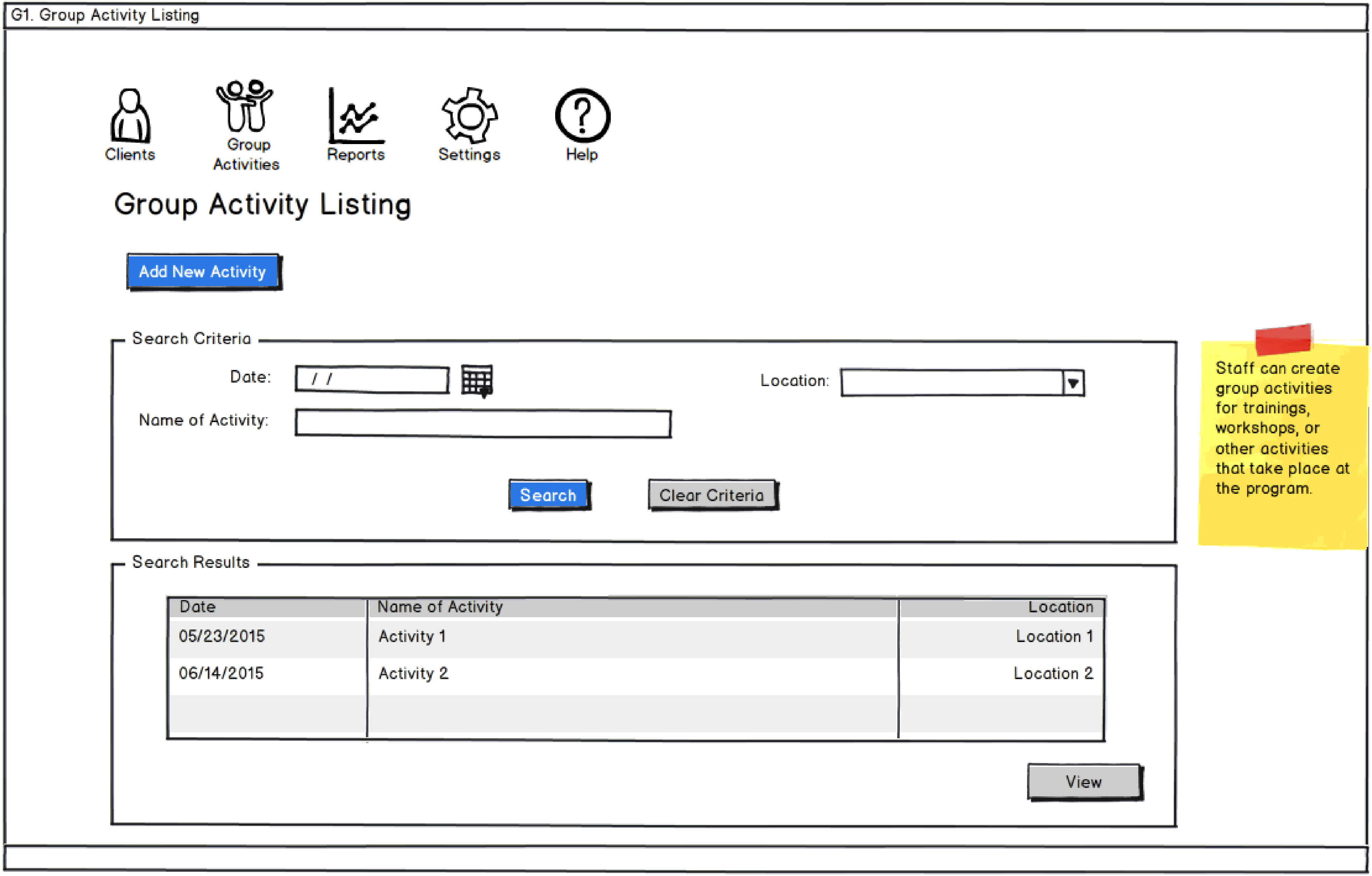
Start Date: / /

End Date: / /

Reason employment ended:

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

Cancel   Save


G1. Group Activity Listing
Clients
Group Activities
Reports
Settings
Help
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

G2. Record Group Activity

Clients | Group Activities | Reports | Settings | Help

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 All | De-Select All

Select	Last Name	First Name.MI	Client ID
☐	Adams	Lurch.X	1234
☐	Bunker	Archie	3517
☐	Fonzarelli	Arthur.Y	2245

Add Selected Clients

Clients in this activity | Select All | De-Select All

Select	Last Name	First Name.MI	Client ID
☐	Jones	Mary	3645
☐	Watson	Bill	4785

Remove Selected Clients

Return without saving

Save

U1. Users

Clients

Group Activities

Reports

Settings

Help

Site: Select Site ▾

Sub-site: Select Sub-site ▾

Users

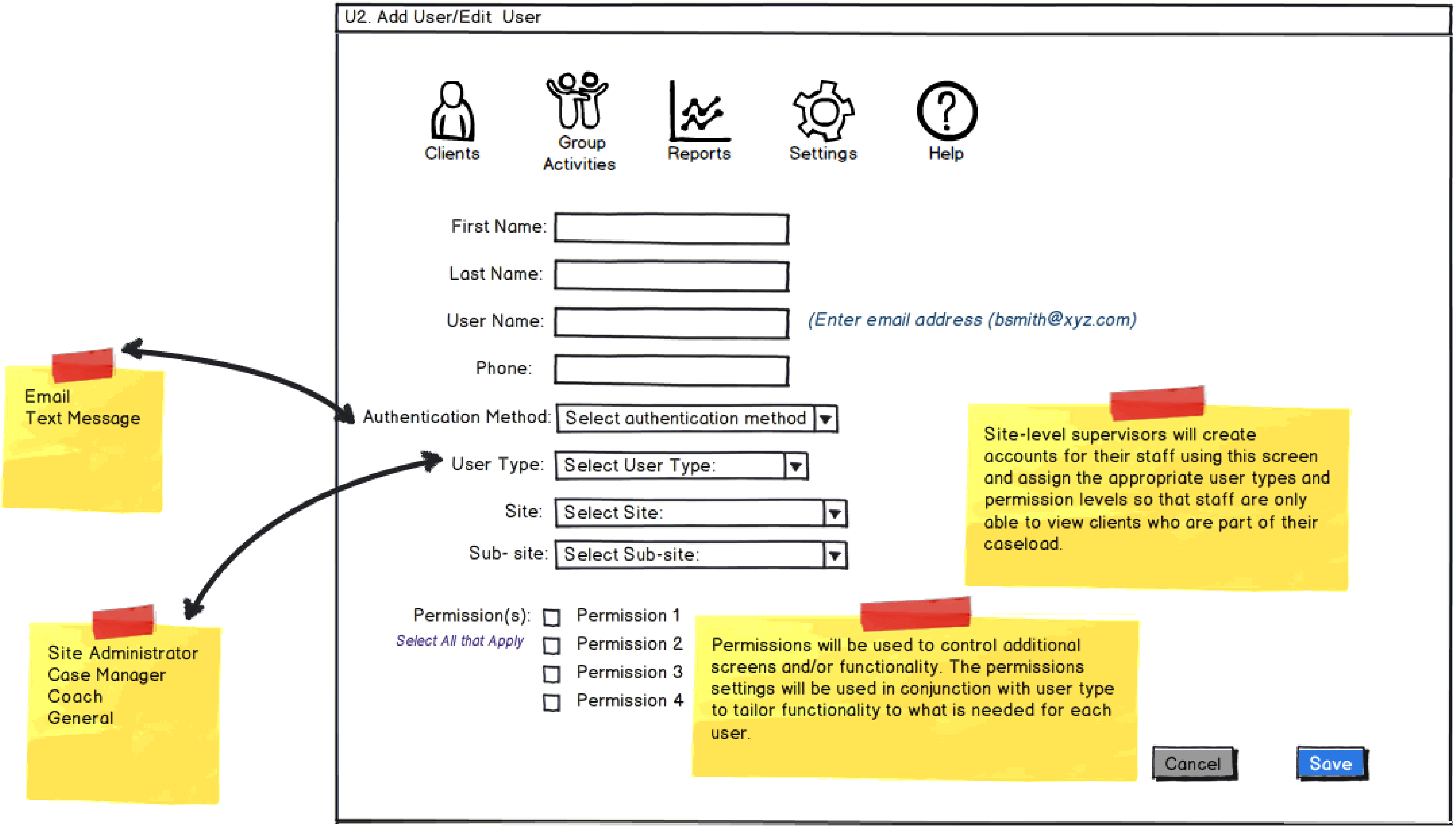
Add User

Items per page 10 ▾

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

1 2 3 >>

x Record(s)


U2. Add User/Edit User
Clients
Group Activities
Reports
Settings
Help
First Name:
Last Name:
User Name:
(Enter email address (bsmith@xyz.com)
Phone:
Authentication Method:
Select authentication method
User Type:
Select User Type:
Site:
Select Site:
Sub- site:
Select Sub-site:
Permission(s):
Select All that Apply
Permission 1
Permission 2
Permission 3
Permission 4
Email
Text Message
Site Administrator
Case Manager
Coach
General
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.
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.
Cancel
Save

U3. On-Demand Reports Listing

Clients

Group Activities

Reports

Settings

Help

Operational Reports

(Select report)

Report #1

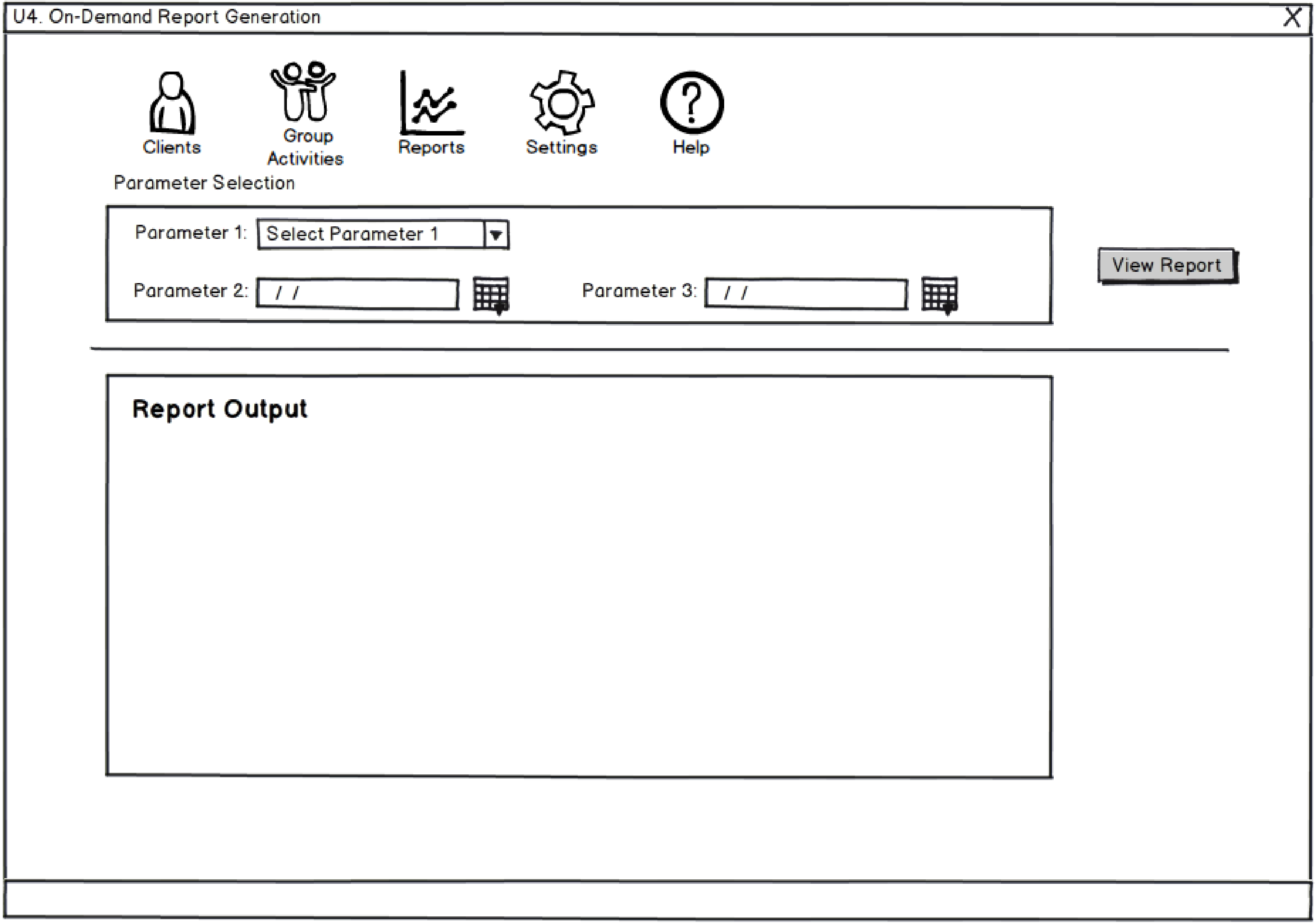
Report #2

Report #3

Report #4

Report #5

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


U4. On-Demand Report Generation
X
Clients
Group Activities
Reports
Settings
Help
Parameter Selection
Parameter 1:
Select Parameter 1
Parameter 2:
/ /
Parameter 3:
/ /
View Report
Report Output