

Data Entry Protocols:

AGENCY INTAKE (IN)

IN: Add Participant
 IN: Enroll
 IN: Reliable Contacts
 IN: CWF Required Demographics
 IN: Referrals

EMPLOYMENT COUNSELING (EC)

First Session Only
 EC: Enroll
 EC: Assessments (several)
If applicable, create Employment/Education Records
 EC: Contact Summary
Subsequent Session
 RUN DETAILED OUTCOME REPORT
 Update all "open" Employment/Education Records
If applicable, create Employment/Education Records
If applicable, Referrals
 EC: Contact Summary

FINANCIAL COUNSELING (FC)

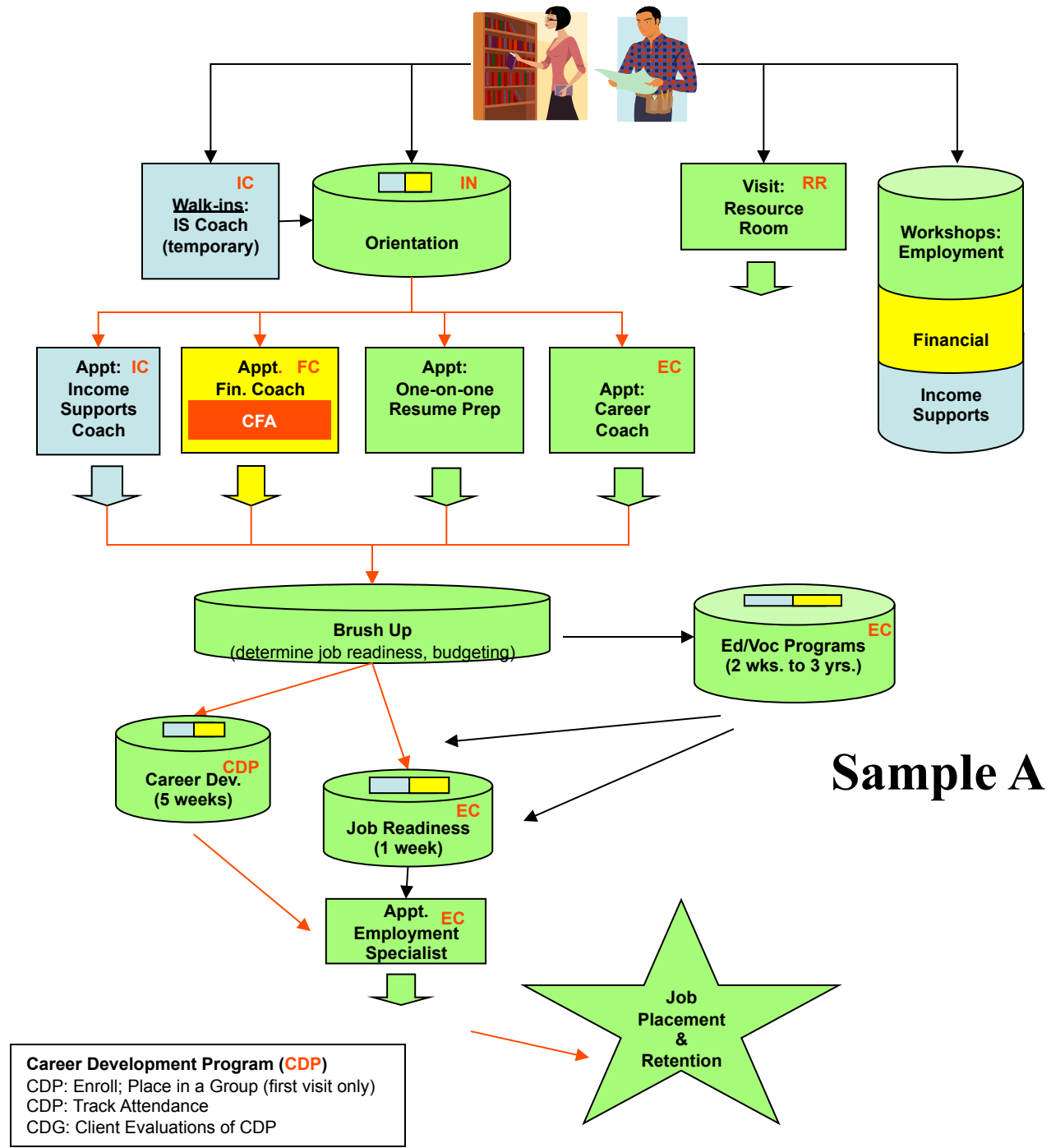
First Session
 FC: Enroll
 RUN CREDIT REPORT (release signed)
 FC: Combined Financial Assessment (CFA-TU Only)
 FC: Combined Financial Assessment (CFA-TU Plus)
If applicable, create FC: SCs
 FC: Contact Summary
Subsequent Sessions
 RUN DETAILED OUTCOME REPORT
 Update all "open" FC: SCs
If applicable, create FC: SCs;
If applicable, update FC: CFA
If applicable, Referrals
 FC: Contact Summary

INCOME SUPPORTS COUNSELING (IC)

First Session
 IC: Enroll
 IC: General Benefits Screening
If applicable, create IC: SCs
 IC: Contact Summary
Subsequent Sessions:
 RUN DETAILED OUTCOME REPORT
 Update all "open" IC: SCs
If applicable, create IC: SCs
If applicable, Referrals
 IC: Contact Summary

RESOURCE ROOM (RR) (Starting August 1)

RR: Enroll (first visit only)
 RR: Track RR Usage



Sample A

Career Development Program (CDP)
 CDP: Enroll; Place in a Group (first visit only)
 CDP: Track Attendance
 CDG: Client Evaluations of CDP