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, 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

Workshops: Employment
- Ed/Voc Programs (2 wks. to 3 yrs.)
  - Appt: EC (Job Readiness Specialist
    - 1 week)
  - Appt: EC (Career Coach
    - 5 weeks)
  - Appt: IC (Income Supports Coach
    - Brush Up: IS Coach (temporary)
      - Orientation)
  - CDP: Enroll; Place in a Group (first visit only)
  - CDP: Track Attendance
  - CDG: Client Evaluations of CDP

Financial
- Income Supports

Sample A

Job Placement & Retention