

Bridges to Career Opportunities: Data Entry Checklist

	<i>FFT Intake</i>	<i>FFT Employment Counseling</i>	<i>FFT Financial Counseling</i>	<i>FFT Income Supports Counseling</i>
<i>Intake</i>	<ul style="list-style-type: none"> ✓ Search for a participant ✓ Add a new participant ✓ Enter demographics ✓ Add household members ✓ Submit Intake and add Case Record details <ul style="list-style-type: none"> ○ Group(s) for Reporting: Citi Bridges 	<ul style="list-style-type: none"> ✓ Add Test Assessment(s) ✓ Add Entities ✓ Add an Employment Record (at program entry, as applicable) ✓ Add an Education/Training Program Record (at program entry, as applicable) ✓ Add a Degree/Certificate/License Record (at program entry, as applicable) 		
<i>First Session</i>		<ul style="list-style-type: none"> ✓ Record a Service Entry ✓ Add an Education/Training Program Record ✓ Record Work/Education Supports, as applicable 	<ul style="list-style-type: none"> ✓ Record Assessments: <ul style="list-style-type: none"> ○ Financial Health ○ Credit Report ○ Budget ○ Balance Sheet ✓ Create an Action Plan ✓ Record a Service Entry 	<ul style="list-style-type: none"> ✓ Record a Service Entry – General Benefits Screening
Add an Outbound Referral, as applicable				
<i>Subsequent Sessions</i>		<ul style="list-style-type: none"> ✓ Record a new Service Entry ✓ Add Entities ✓ Add/update an Education/Training Program Record ✓ Add a Degree/Certificate/License Record ✓ Add/update an Employment Record ✓ Record Work/Education Supports, as applicable 	<ul style="list-style-type: none"> ✓ Take new assessments to record changes: <ul style="list-style-type: none"> ○ Financial Health ○ Credit Report ○ Budget ○ Balance Sheet ✓ Update Action Plan ✓ Record a new Service Entries 	<ul style="list-style-type: none"> ✓ Record a new Service Entry ✓ Make sure a new Budget and/or Balance Sheet Assessment is recorded, as applicable
Add/update an Outbound Referral, as applicable				