SERVICES PROVIDED TOUCHPOINT

Battle Creek Community-Wide Non-Profit Database

Prepared and managed by Goodwill Industries of Central Michigan's Heartland

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Battle Creek Community-Wide Non-Profit Database

Introduction

Part of the Core Measures for the *Connect Battle Creek* Workforce Development Consortium is the percentage of enrolled Participants that receive at least one of the key services from the Partner Agency they are enrolled with. This has been difficult to measure with the old database design, so a new TouchPoint was developed specifically to record these services for each Participant.

The "Services Provided" TouchPoint gives you a custom list of services, determined by the Provider field, showing the services your Agency provides. You can also record this TouchPoint for services given by an outside Agency.

This chapter will describe the TouchPoint in detail, including a Step-by-Step section that will describe each field in detail.

Our evaluation team will key off the Service Provided, the Date of Service, and Time Spent to determine the rate of services provided to Participants.

Services Provided TouchPoint

Introduction

The "Services Provided" TouchPoint is a relatively short form with, normally, only a few fields, but with complicated underlying programming. It's set to allow unrestricted TouchPoints to be recorded from within the Partner Agencies' ETO programs, and it's a single-form TouchPoint (no Child). It can be recorded or edited from *Financial*, *Good Systems – BC Connect*, *KCC iACT*, *KCC Follow-Up*, *Michigan Works! Southwest*, *Woman's Co-Op*, and *Work Hardening - Goodwill*.

This chapter assumes you know how to record TouchPoints, including how to search for Participants and access a list of available TouchPoints. If you are not familiar with these topics, there are other user guide chapters that explain them in detail.

Record New TouchPoint

To record a new TouchPoint, select "Services Provided" from the TouchPoint list presented to you. The Date Taken field at the top of the TouchPoint will default to the current date. In this TouchPoint, the Date of Service is a field on the TouchPoint, so the current default date is acceptable.

This TouchPoint also provides for Staff Attribution, allowing another user to record the information for the Career Coach or Program Manager and give credit to both.

Some of the fields are optional, and some are required. The Step-by-Step instructions will tell which ones are required.

Details

At the very top of the TouchPoint, ETO will show you, and record, the name of the ETO Program it's being recorded in. This will automatically set the first field, Provider, to match. The Provider field can then be overridden to indicate another provider, if necessary. This will be rare, but can be done.

The next field is a list of Services, the list set to match the Provider, from which you will select the core service the Participant received. There is also a required Time Spent field to record the amount of time taken to provide this service (or refer them to an outside provider).

Depending on the service selected from the Service Provided field, one of several sets of option groups will appear to select the detailed services provided for each type. These are non-exclusive choice fields, allowing you choose one or several of the provided choices.

Finally, there is the usual Notes and Comments box where you can record any pertinent comments regarding the provided service.

Completion

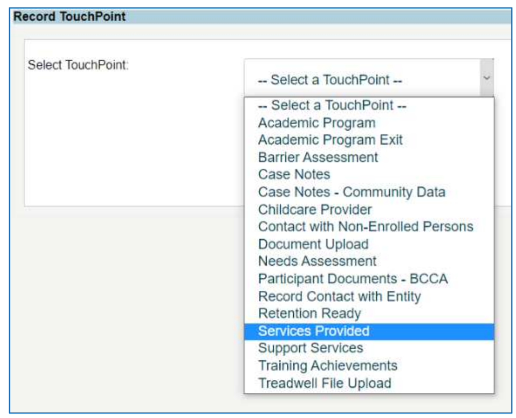
At this point, the TouchPoint is complete, and you can click “Save” at the bottom of the form to submit the TouchPoint and save it into the database. It will then appear on the Participant dashboard in the **All TouchPoints (Most Recent)** Dashboard part, as well as on the **Review TouchPoints** page.

Step-By-Step Instructions

The following instructions will describe each field in the TouchPoint including: Type of field with data requirements (text in green), purpose of the field, conditional effects, and whether it is a required field or optional (required fields are labeled as such in red text). Some of the fields in this TouchPoint are optional, but it's best practice to always be as thorough as possible and complete even the optional fields to the best of your ability.

Record New TouchPoint

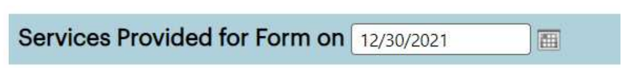
1. You can only record or edit this TouchPoint from within any of the Partner Agencies' ETO Programs, including *Financial*, *Good Systems – BC Connect*, *Michigan Works! Southwest*, *Woman's Co-Op*, and *Work Hardening – Goodwill*. It can be viewed, but not recorded, from within *Community Pre-Enrollment*, *Interest Card*, or *Employment*. If you are not already in your Agency's ETO Program, switch to it first.



2. Using the process most familiar to you, access the Record TouchPoint function. Select "Services Provided" from the list presented to you.

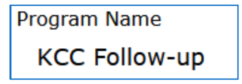
3. Complete the form as thoroughly as possible. The questions are described in detail below, and will tell which are required and which are optional.

Date Taken: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This date will default to the current date. The Date of Service appears on the TouchPoint, so it is acceptable to keep the default date. *Type the date directly into the box, use the calendar control on the right side of it to select the appropriate date, or use the default date. This is a required field*.

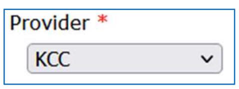


Staff Attribution (Not shown on the form by this name): This is an exclusive choice (can choose only one) dropdown list box containing a list of all ETO Users with access to the program. This field allows you to have another staff member record or edit TouchPoints for you while still giving “credit” to the person with responsibility over the Participant. You cannot select your own name, so this field cannot be required. *If recording for another staff member, or editing someone else’s TouchPoint, select their name from the list. This is an optional field*.

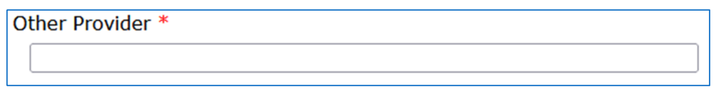
Program Name: This is a lookup field only, indicating the ETO Program the TouchPoint is being recorded in. This field will trigger the conditional programming set into the TouchPoint to activate and set up other controls.



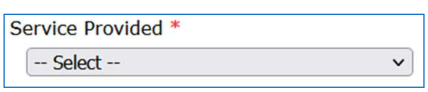
Provider: This is an exclusive choice (can choose only one) drop-down list box listing all the various Agency Programs, including “Goodwill”, “KCC”, “Michigan WORKS!”, “Woman’s Co-Op”, and “Other”. Although the it can be overridden, a default matching answer will be selected automatically by the previous field: Program Name. The answer given will select the list of service options for the next field: Service Provided. *Keep the default response or select the appropriate response from the list box. This is a required field*.



Other Provider: This is a free-text field (75 characters). This question appears only if “Other” is selected for the previous field: “Provider”. *Type in a short descriptive text for a provider that is outside the consortium. This is a required field*.

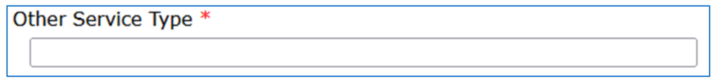


Service Provided: This is an exclusive choice (can choose only one) drop-down list box listing all the services the Partner Agency, determined by the previous questions, Provider. Including for **Goodwill:** “Assessment”, “Financial Coaching”, “Employment Pathway Plan”, “Job Search and Placement Assistance”, “Unpaid Work Experience” and “Other”; for **KCC:** “Assessment”, “Employment Pathway Plan”, “Job Search and Placement Assistance”, “Volunteer Service”, “High School Equivalency (HSE) Preparation”, “Unpaid Work Experience”, and “Other”; for **Michigan WORKS!:** “Assessment”, “Employment Pathway Plan”, Job Search and Placement Assistance” and “Other”; for **Woman’s Co-Op:** “Assessment”, “Job Search and Placement Assistance”, “Volunteer Service”, and “Other” (If “Other” is manually selected for Provider, above, then all the choices will appear

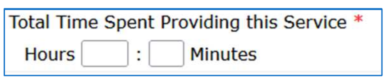


in the list). A set of core services were identified for each of the Partner Agencies and set into lists for each program. Other services may be added, or some may have been missed, and it is always possible to add to or remove from these lists as is appropriate. The response to this question will trigger other fields to appear, depending on the response. *Select the appropriate service from the list box. This is a required field*.

Other Service Type: This is a free-text field (75 characters). This question appears only if "Other" is selected for the previous field: "Service Provided". *Type in a short descriptive text for any service not in the included list*. *This is a required field*.

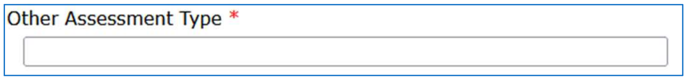


Total Time Spent Providing this Service: This is a time field formatted to accept hours and minutes. *Type the number of hours in the box marked "Hours" and/or the number of minutes in the box marked "Minutes"*. This will help to track the amount of time spent on the behalf of each participant. *Do not put only the time spent speaking with the participant, but consider all the time spent on their behalf as a result of this session, including the time spent completing the TouchPoint*. *This is a required field*.



Assessment Type: This is an exclusive choice (can choose only one) drop-down list box listing all the assessments taken by the Partner Agency, determined by the previous question, Provider. Including, for **Goodwill:** "Life Domain/Social Capital Inventory", "Needs Assessment Checklist", and "Other"; for **KCC:** "ACCUPLACER", "Needs Assessment Checklist", and "Other"; for **Michigan WORKS!:** "Needs Assessment Checklist" and "Other"; for **Woman's Co-Op:** "Arizona Self-Sufficiency Matrix", "Needs Assessment Checklist", and "Other". A set of assessments was identified for each of the Partner Agencies and set into lists for each program. Other assessments may be added, or some may have been missed, and it is always possible to add to or remove from these lists as is appropriate. Selecting "Other" will cause a new field, Other Assessment Type, to appear. *Select the appropriate assessment from the list box. This is a required field*.

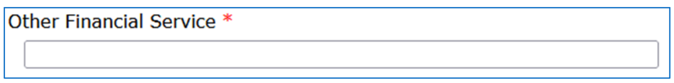
Other Assessment Type: This is a free-text field (75 characters). This question appears only if "Other" is selected for the previous field:



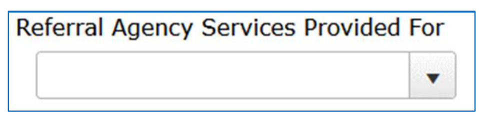
Assessment Type. *Type in a short descriptive text for any service not in the included list*. *This is a required field*.

Financial Service(s) Provided: This is a nonexclusive choice (can choose more than one) option group with a preselected list of options: "Credit Counseling", "Budgeting", "Financial Planning", "Vehicle Search", "Tax Advice and Prep", "ITIN Application Assistance", and "Other". This question appears only if "Financial Coaching" is selected for the previous field: "Service Provided". Selecting "Other" will also trigger another new field to appear: Other Financial Service. *Select any and all services that apply to this session with the Participant*. *This is a required field*.

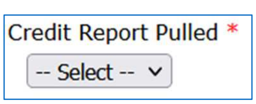
Other Financial Service: This is a free-text field (75 characters). This question appears only if "Other" is selected for the previous field: Financial Service(s) Provided. *Type in a short descriptive text for any service not in the included list*. *This is a required field*.



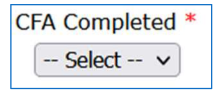
Referral Agency Services Provided For: This is an exclusive choice (can choose only one) drop-down list box with choices taken directly from the Entities table, having the Type of "Referral Source" and Sub-Type of "Financial Partner" assigned. This question appears only if "Financial Coaching" is selected for the previous field: "Service Provided". ETO will show the short list of all Referral Entities/Financial Partners assigned to your program in the database, as well as those who are set as "Enterprise Level" Entities. If the referral agency does not appear in the selection list, please notify the ETO Administrator and request the agency be added. *Select the Financial Partner making the referral for this service. This is an optional field.*



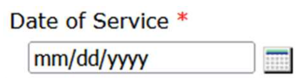
Credit Report Pulled: This is a Yes/No dropdown list box field. This question appears only if "Financial Coaching" is selected for the previous field: "Service Provided". *If you pulled a credit report for, or as a result of, this service, select "Yes" from the dropdown list. If not, select "No"*. *This is a required field*.



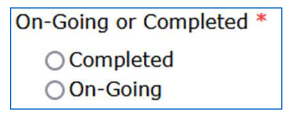
CFA Completed: This is a Yes/No dropdown list box field. This question appears only if "Financial Coaching" is selected for the previous field: "Service Provided". *If you completed, or will complete, a "Combined Financial Assessment (CFA)" as a result of this service, select "Yes" from the dropdown list. If not, select "No". This is a required field.*



Date of Service: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. *Type the date the service was provide directly into the date control, or use the calendar tool to select the correct date. This is a required field.*



On-Going or Completed: This is an exclusive choice (can choose only one) option group with two pre-selected choices, "Completed" and "On-Going". This question appears only if "Financial Coaching" is selected for the previous field: "Service Provided". The evaluation team needs to know whether financial services are completed or on-going, so this control only appears for financial services. If "Completed" is selected, another new field, Completion Date, will appear. *Click the radio button next to the appropriate choice to select. This is a required field.*

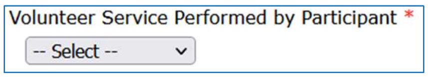


Completion Date: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This question appears only if Completed" is selected for the previous field: "On-Going or Completed". *Type the date the financial services for this Participant was completed directly into the date control, or use the calendar tool to select the correct date. This is a required field.*

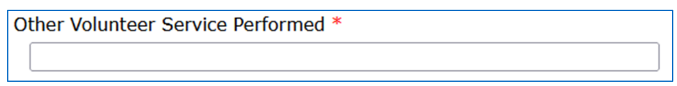
Job Search Assistance Types: This is a nonexclusive choice (can choose more than one) option group with a preselected list of options: "Resume Writing", "Interview Coaching", "Job Search Coaching", "Online Application Assistance", "Job Placement", "Online Coaching", "Job Qualification Assessments", and "Other". This question appears only if "Job Search and Placement Assistance" is selected for the previous field: "Service Provided". Selecting "Other" will also trigger another new field to appear: Other

Job Search Assistance. *Select any and all services that apply to this session with the Participant*. *This is a required field*.

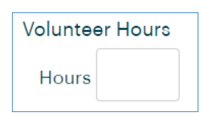
Volunteer Service Performed by Participant: This is an exclusive choice (can choose only one) drop-down list box listing all the Volunteer Assistance accepted by the Partner Agency. Including "Porch Drop", "Laundry", "Rides", "Day Care", "Food Boxes", "Donation Closet", "Janitorial Help", "Work in Co-Op Store", "Tutor", "Welcome Center", and "Other". This question appears only if "Volunteer Service" is selected for the previous field: "Service Provided". A set of volunteer service opportunities was identified for the Partner Agencies that offer these opportunities, and set into lists for each program. Others may be added, or some may have been missed, and it is always possible to add to or remove from these lists as is appropriate. Selecting "Other" will cause a new field, Other Volunteer Service Performed, to appear. *Select the appropriate service from the list box. This is a required field*.



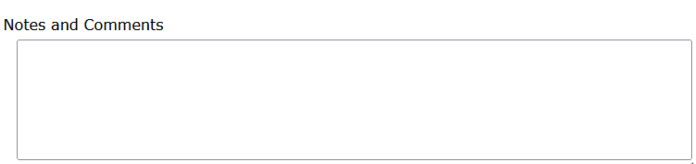
Other Volunteer Service Performed: This is a free-text field (75 characters). This question appears only if "Other" is selected for the previous field: Volunteer Service Performed by Participant. *Type in a short descriptive text for any service not in the included list*. *This is a required field*.



Volunteer Hours: This is a time field formatted to accept hours only. *Type the number of hours in the box marked "Hours" (will not accept anything but whole hours—no decimals or fractions)*. This field will only appear when "Volunteer Service" is selected for a previous field: Service Provided. This will track the amount of volunteer time spent by each participant. *Enter the number of hours spent in this volunteer activity by the Participant. This is an optional field .*



Notes and Comments: This is a free-text field (8000 characters). *Type in a short descriptive text for any notes or comments you need to attach to the record*. *This is an optional field*.



4. Click the “Save” button at the bottom of the form to submit the TouchPoint to the database and save the form in completed status. ETO should return to the page from which you accessed the TouchPoint.