

RETENTION READY ON THE GOODWILL SITE

Goodwill Central Michigan Heartland Site

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

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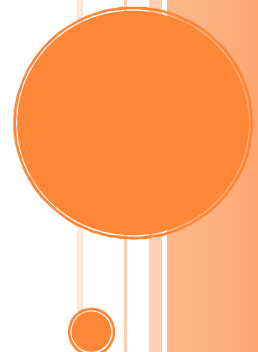


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INTRODUCTION

Although the “Retention Ready” TouchPoint was developed for the **BC Community Access** site for a specific, and somewhat different, purpose, using it to assist with GII reporting is the simplest and safest way to accomplish the goal we have for the **Goodwill Central Michigan Heartland** site.

On the **BC Community Access** site, “Retention Ready” is used to determine who is to be counted in the denominator pool for the employment rates of each Partner Agency Program. On the **Goodwill Central Michigan Heartland** site, it will be used to determine which program type (*Program Intensive* or *Job Placement Intensive*) the Participant will be placed in, in terms of GII reporting, for that calendar year. Most important, it will tell us when a Participant from a *previous* year—previously placed into Job Placement Intensive—should be placed back into Program Intensive for that succeeding year on GII’s annual statistical report.

Once a Goodwill program’s *primary goal* in working with a Participant becomes placing them in a job, then a “Retention Ready” TouchPoint should be recorded, setting the Retention Ready field to “Yes”.

When the Participant has been placed in competitive, long-term employment for a length of time that demonstrates longevity, the TouchPoint should be re-opened and the two Checklist items (“Maintained Employment for at Least 90 Days” [the number is arbitrary and meaningless] and “Goodwill Job Placement Services Complete”) check off. This will automatically change Retention Ready to “Transition from Job Placement to Program Intensive”.

Details on the TouchPoint, including a detailed description of each field and how to complete them, are given on the following pages.

RETENTION READY TOUCHPOINT

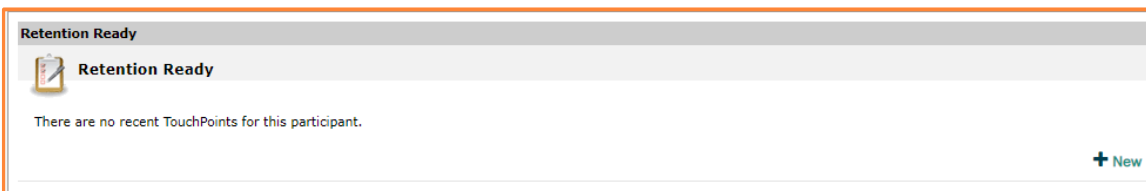
Introduction

The “Retention Ready” TouchPoint is a short and simple form with only a few fields. It’s set to allow one TouchPoint to be recorded per Participant, per ETO program, per enrollment, and can be modified without restriction to keep it up to date with the Participant’s progress. As they progress through the checklist criteria, users will not add a new TouchPoint, but will go into the existing TouchPoint and update it as applicable. The criteria for the Goodwill site will be explained later in this chapter.

Record New TouchPoint

To record a new TouchPoint, select “Retention Ready” from the TouchPoint list presented to you. The Date Taken field at the top of the TouchPoint will default to the current date, which is acceptable to use for this TouchPoint. Two other dates appear on the TouchPoint form.

The best way to view and record this TouchPoint is through the dashboard part on the Participant’s dashboard. For most Goodwill ETO programs, the **Retention Ready** dashboard part will be the second section below the dashboard menu, immediately below the **Goodwill Employment**. Any TouchPoints that have already been recorded will appear in the view table. If none has yet been recorded in the current Program, a **+New** link will appear at center-bottom of the section.



Details

The TouchPoint will automatically show the name of the ETO Program you are logged into as you record the TouchPoint. This will trigger some conditional programming to filter the list of choices in the checklist toward the bottom of the TouchPoint.

As stated previously, “Retention Ready” is used to determine the type of service being provided to the Participants for GII Annual reporting, and the key data field on the form is that status—which will appear on the view table—and the Checklist. Unlike the **BC Community Access** site, this TouchPoint will initially be recorded as soon as the primary goal for that Participant become placement in long-term employment, and the Retention Ready field should be initially start as “Yes”. Once the goal has been

achieved, and they have retained the desired employment for a reasonable time (2 to 3 months), the status should be changed to "Transition from Job Placement to Program Intensive".

While you can select "Transition from Job Placement to Program Intensive" with the BCCA equivalent to Goodwill programs, you will not be able to select "Maintained Employment for 90 Days" or "Goodwill Job Placement Services Complete" for the Checklist. The key field, though, is Retention Ready, so that option is available for Goodwill programs on the BCCA site, and to Goodwill only, but will not affect the other BCCA programs.

Checking the two available options, ("Maintained Employment for at Least 90 Days" and "Goodwill Job Placement Services Complete", will facilitate this be automatically setting Retention Ready when checked.

There is a date to note when the assessment process begins and another date to show when the Participant was deemed Retention Ready. On the Goodwill site, for Goodwill programs not associated with the *Connect Battle*

Creek Consortium, these should both be set for the date their goal changed.

Next is a checklist showing only the options for the ETO Program the TouchPoint is being recorded in. On the BCCA site, the checklist is used to show progress toward being Retention Ready, and help determine when they become Retention Ready. On this site, the purpose is to show that they once were a Job Placement Intensive client and now that goal has been achieved, though we continue to serve them with other, Program Intensive, needs.

Last is an optional comment field capable of recording up to 8000 characters, should the case manager need to record any notes.

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 in the Dashboard part, showing the Retention Ready status and the final date of determination when the status is "Yes".

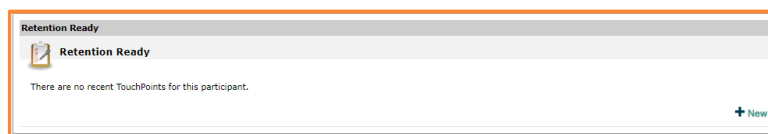
STEP-BY-STEP INSTRUCTIONS

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**). Most of the fields in this TouchPoint are required. Fields that are said to be 'optional' should not be taken to mean they are not necessary or do not need to be filled out. *For the sake of producing good reports, fill out all fields to the best of your ability; do not skip any because you don't think they are unimportant.*

Record New TouchPoint

1. You can only record or edit this TouchPoint from within specific ETO Programs on the **Goodwill Central Michigan Heartland** site, including EDGE, Financial Development - GW, Family Development - GW, Job Development - GW, and Goodwill Connects. It can be viewed but not recorded from within all other programs on the site. If you are not already in your ETO Program, switch to it first.

2. Using the process most familiar to you, access the Record TouchPoint function. However, the best way to access this TouchPoint, for any purpose, is from the **Retention Ready** Dashboard part on the *Participant's* dashboard.



To record new, click the **+New** link at the bottom-center of the section. *Note: if this TouchPoint has already been recorded for the Participant in your program, the **+New** link will not appear, and the TouchPoint will not appear in any other list of options, as it's set to allow only one "Retention Ready" TouchPoint per Participant, per Program.*

3. Complete the form as thoroughly as possible. Most of the questions are required and the details below 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

Retention Ready for Fake, Louie on 9/29/2021

will reject incorrectly formatted responses rather than resolve them.

This date will default to the current date for this TouchPoint. This date is not reported on, so leaving the default date in place is acceptable.

This is a required 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.

Program Name
Family Development - GW

Date Initiated: 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 *primary goal* for working with this Participant became placement in long-term employment. Type the date directly into the control, or use the calendar control on the right to choose the date. *This is a required field.*

Date Initiated *

mm/dd/yyyy

Retention Ready: This is an exclusive choice (can choose only one) option group with a pre-selected set of choices for the Participant's Retention Ready status, "Yes", "No", and "Transition from Job Placement to Program Intensive". Retention Ready Status is a key question and will display on the View Table. As soon as the primary goal for this Participant becomes placement in long-term employment, this is the time to initially record this TouchPoint, and you should select "Yes" at that time. If they at any point experience setbacks that make them no longer Retention Ready, select "No". Once the goal has been reached, and the Participant has secured, and demonstrates an ability and willingness to retain, long-term employment, "Transition from Job Placement to Program Intensive" should be checked (selecting both items in the Checklist will automatically select this option). If "Yes" is selected, a new field: Date Final Determination Made, will appear. Click to select the radio button next to the appropriate choice. *This is a required field.*

Retention Ready *

☐ Yes

☐ No

☐ Transition from Job Placement to Program Intensive

Date Final Determination Made: 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 field will only appear if "Yes" or "Transition from Job Placement to

Date Final Determination Made *

mm/dd/yyyy

Program Intensive" is selected for the previous question: Retention Ready. This field was designed for use on the BCCA site, but is still required. Enter the same date you used for Date Initiated. If they have been set to "No" for Retention Ready at some point, and have regained their status to "Yes", change the date to match the new set status. Or, if they transition from "Yes" to "Transition from Job Placement to Program Intensive", update the

field to match. *Type the date directly into the control, or use the calendar control on the right to choose the date. **This is a required field.***

Checklist: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options customized for the site; for all Goodwill programs: “Maintained Same Job for 90 Days”, and “Goodwill Job Placement Services

Complete”. On this site, this field should only be updated when the Participant has reached the goal of long-term Job

Placement. *When long-term employment has been secured, select both options to indicate this and to move them out of the Job Placement Intensive category and back into the Program Intensive category. This is an optional field.*

Checklist

- ☐ Maintained Employment for at Least 90 Days
- ☐ Goodwill Job Placement Services Complete

Once both boxes in the checklist have been checked off, ETO will automatically set—or change—the Retention Ready value to “Transition from Job Placement to Program Intensive” and a message

Participant has transitioned from Job Placement Intensive Services back to Program Intensive Services

will appear stating the Participant has transitioned from one service type to another. *You should also change the Date Final Determination Made to the current date, at this point, as well.*




Comments and further observations: This is a free-text field (8000 characters). *Type any observations or comments that may be pertinent to the Participant’s journey toward long-term employment*

Comments and further observations

and their transition from one service type to another. This might include many different possible responses.

Be specific and give a complete answer that others will understand, but not with too much detail. 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 you accessed the TouchPoint from. If accessed from the Participant’s dashboard, the new TouchPoint you

Retention Ready						
Retention Ready						
Take Action	Program	Date Last Updated	Last Updated By	Attributed Staff Name	Retention Ready	Date Final Determination Made
  	Family Development - GW	2/17/2022	John Recher		Transition from Job Placement to Program Intensive	2/17/2022


just recorded should appear in the **Retention Ready Status** dashboard part.

Dashboard Part and View Table

For most ETO programs, the **Retention Ready** dashboard part will appear as the top TouchPoint section on the Participant's dashboard.

Retention Ready						
Take Action	Program	Date Last Updated	Last Updated By	Attributed Staff Name	Retention Ready	Date Final Determination Made
  	Family Development - GW	2/17/2022	John Recher		Transition from Job Placement to Program Intensive	2/17/2022

This dashboard part, or section, will show very basic information from and about the TouchPoint in a set of columns (the actual columns may vary from one program to the next). The first column, "Take Action" has a set of icons that will vary depending on the type of TouchPoint and its unique settings. Notice that for the TouchPoint in the image above the **+** icon (as well as the **+New** link) is missing from the group because one TouchPoint already exists in this program and ETO will allow only one TouchPoint to be recorded per program. From another ETO Program where only this one TouchPoint has been recorded, the single TouchPoint would still appear in the view table and the **+** icon would be in its normal place.

Take Action
  

Program
Family Development - GW

The second column lists the ETO Program the TouchPoint was recorded (or last edited) in.

The next column displays the date the TouchPoint was last updated. The creation date is not of extreme importance so it is not displayed in this view table.

Date Last Updated
9/29/2021

Last Updated By	Attributed Staff Name
John Recher	

The fourth and fifth columns show who made the last update and, if any, what other staff member was given attribution for the TouchPoint.

The sixth, and most important, column is the Retention Ready status set by this Agency for the Participant. It will state simply "Yes", "No", or "Transition from Job Placement to Program Intensive" on the Goodwill site.

Retention Ready
Transition from Job Placement to Program Intensive

The "Date Final Determination Made" field is populated from the start with Goodwill programs, so there should always be a value in this last column.

Date Final Determination Made
2/17/2022

RETENTION READY PROCESS

Goodwill Program Managers, Case Workers, and Career Coaches will track the progress of each Participant through their Program's efforts to equip them to secure and retain long-term employment. The "Retention Ready" TouchPoint is to be used to indicate—for GII reporting—when a Participant changes from one service type to another.

The checklist is not a required field for programs on the Goodwill site. On the Community Access site, is it used to show when a Participant *is* retention ready, but on the Goodwill site it is used to show when a Participant transitions beyond being retention ready.

When a Participant has achieved the goal of securing long-term, gainful employment, reopen the existing "Retention Ready" TouchPoint that should've been created when that goal first became their primary goal and check the two items on the checklist: "Maintained Employment for at Least 90 Days" and "Goodwill Job Placement Services Complete". This will automatically set the Retention Ready value to "Transition from Job Placement to Program Intensive" and display the Date Final Determination Made field. Set the appropriate date and move on to notes. Notes should be recorded in the Comments and further observations box at the bottom of the TouchPoint explaining about the goal reached and their transition from Job Placement Intensive to Program Intensive.

