Needs Assessment and Barriers Resolved

Battle Creek Community-Wide Non-Profit Database

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Introduction

There has always been a Barriers Assessment TouchPoint in ETO, with different lists of barriers for each of the Partner Agencies. The move to standardize data management and reporting in ETO led to a new, common, list of barriers, and it was decided to change the terminology from "Barriers" to "Needs" in order to better reflect the purpose of the assessment. The evaluation team determined they did not need the level of detail either the former or the current lists provided, needing only to know if barriers, or needs, existing within any of four categories. The division of the barriers into the four categories complicated the existing TouchPoint too much to keep using it, so a new TouchPoint, "Needs Assessment" was developed to replace it. "Needs Assessment" now effectively replaces the old "Barrier Assessment" TouchPoint and will be used by all Agencies and programs, along with the paper form associated with it.

The old TouchPoint also included a section to list the top three barriers the Participant identified as being most pressing needs. This functionality was available only for Michigan WORKS! staff in the old TouchPoint, but is now available for all Partner Agencies.

Also available for all, but *designed* for Michigan WORKS!, is a Child form, "Barriers Resolved", where each barrier can be shown as cleared, including the date resolved and any notes that are pertinent to that barrier.

This chapter will describe the two TouchPoints, including Step-by-Step instructions providing complete information about each field.

Needs Assessment TouchPoint

Introduction

The "Needs Assessment" TouchPoint is a relatively simple form with only a few fields. It's set to allow one TouchPoint to be recorded per Participant, per ETO program, per enrollment.

The two-part, Parent/Child, nature of this TouchPoint and the associated "Barriers Resolved" TouchPoint create a security issue allowing users to see the TouchPoint dashboard and any Child TouchPoints *only* in programs they have access to. For example, KCC users all have access to both *KCC iACT* and *KCC Follow-Up* programs, so, while logged into *KCC Follow-Up* they will be able to access the TouchPoint dashboard for these TouchPoints that are recorded in *KCC iACT*, but not for TouchPoints recorded in *Michigan Works! Southwest*.

This chapter assumes you know how to record TouchPoints, including how to search for Participants, access a list of available TouchPoints, and how to work with Parent/Child 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 "Needs Assessment" from the TouchPoint list presented to you. The Date Taken field at the top of the TouchPoint will be blank by default. In this TouchPoint use the date the Assessment was taken for this field. A line of instruction in red font appears at the top of the form to remind you what date to use.

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.

Only the Date Taken at the top, and some fields at the bottom are required.

Details

At the top of the form is another line of instruction in black font showing the paper form rev number to use with the TouchPoint. If the version is newer than the paper form you are using, please obtain and use the newest version. If the number is older, please advise the System Administrator of the change so the TouchPoint can be updated.

"Needs Assessment" is used to list the barriers—shown in this form as needs—to securing long-term employment experienced by the Participant. The needs are broken down into four categories: "Workforce and Education", “Financial”, “Work Supports”, and “Health and Wellness”. There are also three “Other Needs” options that can be selected, with associated text fields to provide a name for them.

Finally, there are three dropdown list boxes, each containing all of the needs on the form, including the three “Other Needs”, to show the most pressing needs the Participant wants to address, or the Career Coach determines to be of greatest importance.

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. The Participant dashboard will have a TouchPoint dashboard link on the view table, while the Review TouchPoints view table will include the dashboard icon in the “Take Action” column (if the user has access to the dashboard for that TouchPoint).

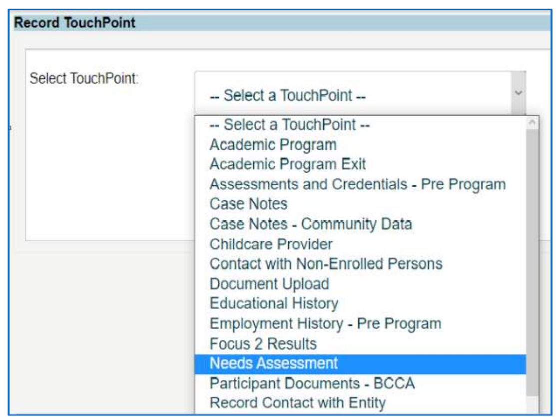
Step-By-Step Instructions

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). Only a few of the fields in this TouchPoint are required. The actual needs-lists are the key to the document, but cannot be required, so be sure all the needs identified with the Participant are transferred to the TouchPoint.

Record New TouchPoint

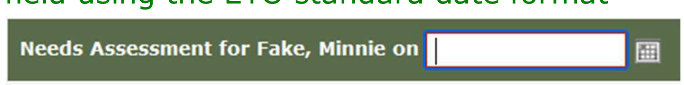
1. You can only record or edit this TouchPoint from within any of the Agencies' ETO Programs, including *Financial*, *Good Systems – BC Connect*, *Michigan Works! Southwest*, *Woman's Co-Op*, and *Work Hardening – Goodwill*. It can be viewed—if you have access to the originating program—but not recorded 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 "Needs Assessment" from the list presented to you. *Note: if this TouchPoint has already been recorded for the Participant in your program, the* ***+New*** *link will not appear on the Participant dashboard, and the TouchPoint will not appear in any other list of options, as it's set to only allow one "Needs Assessment" TouchPoint per Participant, per Program.*



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 be blank by default. Use the date the assessment was conducted. *Type the date of the assessment directly into the box or*



use the calendar control on the right side of it to select the appropriate date. This is a required field.

Paper Form Rev Number: This is a line of instructional text only. This line will identify the version of the paper form the TouchPoint is designed to work with. If the version is newer than the paper form you are using, please obtain and use the newest version. If it is older, please advise the ETO Administrator of the change so the TouchPoint can be updated.

For use with form version 1.0 (8/12/2021)

Workforce and Education: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options for this category of needs: "I don't have a good work history", "I don't have a HS Diploma or GED", "I need help with reading and/or writing", "It is hard for me to use a computer", "I need training for my job", "I need help with speaking English", "I need help with math", "I need help with my resume", "I need help with interviewing", "I need help finding a job or a better job"; "I need certain work shifts", and "I need tools, equipment, and/or uniform". Click the box beside each item to select. *Select any and all items the Participant has identified as needs presenting a barrier to long-term, gainful employment*. This field is optional.

Workforce and Education

- ☐ I don't have a good work history
- ☐ I don't have a HS Diploma or GED
- ☐ I need help with reading and/or writing
- ☐ It is hard for me to use a computer
- ☐ I need more training for my job
- ☐ I need help with speaking English
- ☐ I need help with math
- ☐ I need help with my resume
- ☐ I need help with interviewing
- ☐ I need help finding a job or a better job
- ☐ I need certain work shifts
- ☐ I need tools, equipment, and/or uniform

Financial: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options for this category of needs: "I fear losing pubic benefits (e.g. Medicaid)", "I need help paying household bills", "I need help with getting health insurance", "I need help with fines and fees", and "I need help with housing". Click the box beside each item to select. *Select any and all items the Participant has identified as needs presenting a barrier to long-term, gainful employment*. This field is optional.

Financial

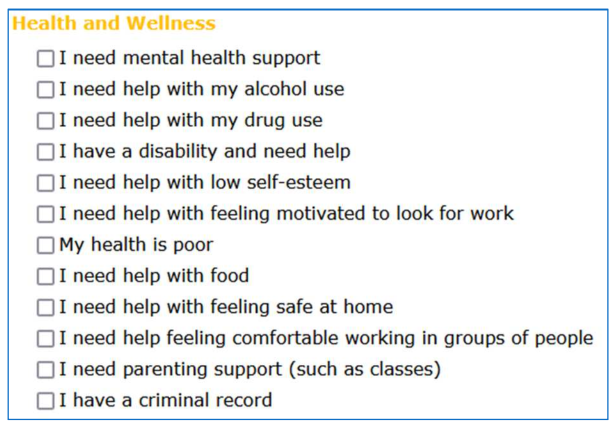
- ☐ I fear losing public benefits (e.g. Medicaid)
- ☐ I need help paying household bills
- ☐ I need help with getting health insurance
- ☐ I need help with fines and fees
- ☐ I need help with housing

Work Supports: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options for this category of needs: "I need a way to get to work or school", "I need a valid Michigan driver's license", "I need a valid Michigan State ID", "I need help with car insurance", "I don't have a birth certificate"; "I need childcare and/or family care", "I need interview clothing", "I need a phone", "I need help with the internet", and "I don't have a Social Security Card". Click the box beside each item to select. *Select any and all items the Participant has identified as needs presenting a barrier to long-term, gainful employment*. This field is optional.


Work Supports

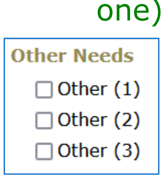
- ☐ I need a way to get to work or school
- ☐ I need a valid Michigan driver's license
- ☐ I need a valid Michigan State ID
- ☐ I need help with car insurance
- ☐ I don't have a birth certificate
- ☐ I need childcare and/or family care
- ☐ I need interview clothing
- ☐ I need a phone
- ☐ I need help with the internet
- ☐ I don't have a Social Security card

Health and Wellness: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options for this category of needs: "I need mental health support", "I need help with my alcohol use", "I need help with my drug use", "I have a disability and need help", "I need help with low self-esteem"; "I need help with feeling motivated to look for work", "My health is poor", "I need help with food", "I need help with feeling safe at home", "I need help feeling comfortable working in groups of people"; "I need parenting support such as classes", and "I have a criminal record". Click the box beside each item to select. *Select any and all items the Participant has identified as needs presenting a barrier to long-term, gainful employment*. This field is optional.


Health and Wellness

- ☐ I need mental health support
- ☐ I need help with my alcohol use
- ☐ I need help with my drug use
- ☐ I have a disability and need help
- ☐ I need help with low self-esteem
- ☐ I need help with feeling motivated to look for work
- ☐ My health is poor
- ☐ I need help with food
- ☐ I need help with feeling safe at home
- ☐ I need help feeling comfortable working in groups of people
- ☐ I need parenting support (such as classes)
- ☐ I have a criminal record

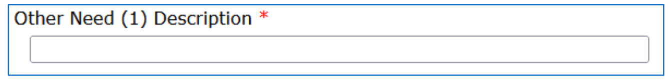
Other Needs: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options for this category of needs: "Other (1)", "Other (2)", and "Other (3)". For any needs the Participant identifies that do not match up with the available prescribed list, you have the option of selecting up to three "Other" needs. Selecting any of these options will cause new fields, Other Need (#) Description, to appear. Click the box beside


Other Needs

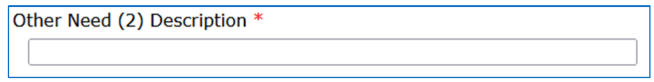
- ☐ Other (1)
- ☐ Other (2)
- ☐ Other (3)

each item to select. *Select any and all items Other Needs that are appropriate.* This field is optional.

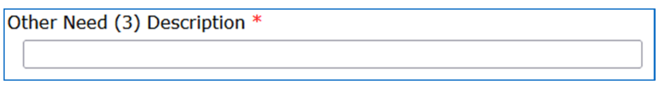
Other Need (1) Description: This is a free-text field (75 characters). This question appears only if "Other (1)" is selected for the previous field: "Other Needs". Type in a short description of any other barrier to long-term, gainful employment the participant may be experiencing. *This is a required field*.



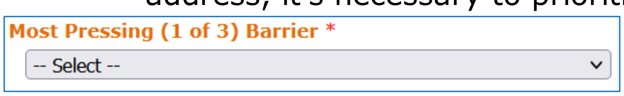
Other Need (2) Description: This is a free-text field (75 characters). This question appears only if "Other (2)" is selected for the previous field: "Other Needs". Type in a short description of any other barrier to long-term, gainful employment the participant may be experiencing. *This is a required field*.



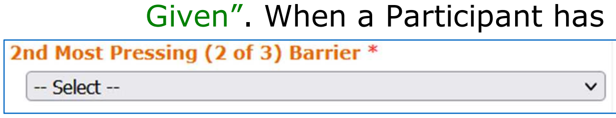
Other Need (3) Description: This is a free-text field (75 characters). This question appears only if "Other (3)" is selected for the previous field: "Other Needs". Type in a short description of any other barrier to long-term, gainful employment the participant may be experiencing. *This is a required field*.



Most Pressing (1 of 3) Barrier: This is an exclusive choice (can choose only one) drop-down list box listing all the needs from the above categories, including the "Other (#) Needs" options and "No Answer Given". When a Participant has an overwhelming number of needs to address, it's necessary to prioritize them and begin with a very short list of the most immediate needs. These last three fields allow you to do this and record the three most pressing barriers in the TouchPoint so other Program Managers can see and assist with these priority needs. If the Participant declines to make this selection, you can select "No Answer Given" from the top of the list. *Select the appropriate response from the list box, being careful to select only a need that was checked in the lists above. This is a required field*.



Most Pressing (2 of 3) Barrier: This is an exclusive choice (can choose only one) drop-down list box listing all the needs from the above categories, including the "Other (#) Needs" options and "No Answer Given". When a Participant has an overwhelming number of needs to address, it's necessary to prioritize them and begin with a very short list



of the most immediate needs. These last three fields allow you to do this and record the three most pressing barriers in the TouchPoint so other Program Managers can see and assist with these priority needs. If the Participant declines to make this selection, you can select "No Answer Given" from the top of the list. *Select the appropriate response from the list box, being careful to select only a need that was checked in the lists above. This is a required field*.

Most Pressing (3 of 3) Barrier: This is an exclusive choice (can choose only one) drop-down list box listing all the needs from the above categories, including the "Other (#) Needs" options and "No Answer Given". When a Participant has an overwhelming number of needs to address, it's necessary to prioritize them and begin with a very short list of the most immediate needs. These last three fields allow you to do this and record the three most pressing barriers in the TouchPoint so other Program Managers can see and assist with these priority needs. If the Participant declines to make this selection, you can select "No Answer Given" from the top of the list. *Select the appropriate response from the list box, being careful to select only a need that was checked in the lists above. This is a required 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.

Barriers Resolved (Child) TouchPoint

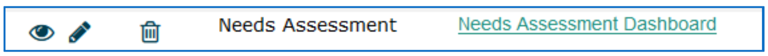
Introduction

The old "Barriers Assessment" TouchPoint did not include a mechanism for showing the barriers resolved. To do so, one could only edit the existing TouchPoint, un-checking the previously selected barriers as they were resolved. There was no field to leave a note or comment explaining when and how the barrier was resolved, forcing users to also record a Case Note TouchPoint (which could not be linked to the "Barriers Assessment").

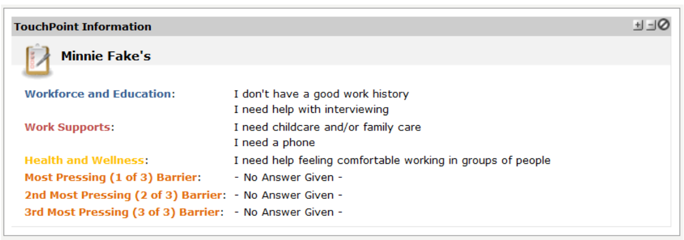
The new "Needs Assessment" TouchPoint includes a mechanism for recording this information through a Child form. As with all Parent/Child TouchPoints, you can only access to View, Add, or Edit the Child forms on the Parent's TouchPoint dashboard. This chapter assumes you know how to use the Parent/Child TouchPoints and how to access the TouchPoint dashboard.

Record New TouchPoint

To record a new Child TouchPoint, click the TouchPoint dashboard link from

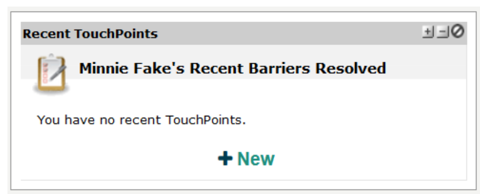


the Participant dashboard, or the dashboard icon from the "Take Action" column on the **Review TouchPoints** page.

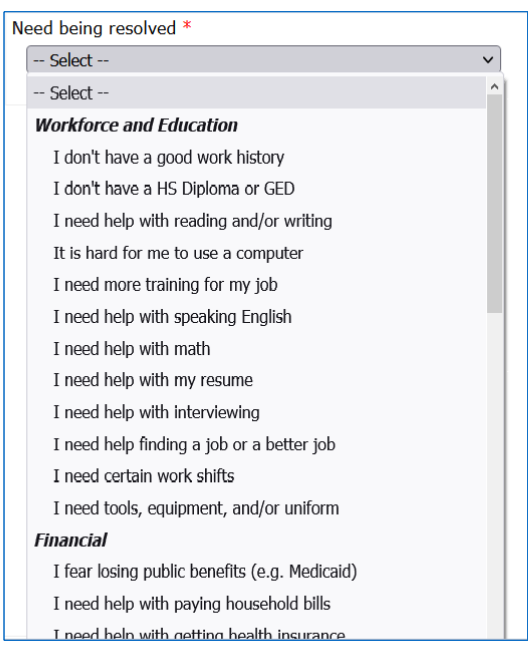


The TouchPoint dashboard will show a summary of all the fields answered on the Parent TouchPoint in the left pane, or dashboard part.

The right pane shows any Child TouchPoints completed. If no TouchPoint has been recorded, this pane will say "You have no recent TouchPoints". There should always be a **+New** link at the bottom center of this dashboard part. Click **+New** to Add a new "Barriers Resolved" Child TouchPoint.



The Date Taken field at the top of the TouchPoint default to the current date. The "Date of Resolution" is on the TouchPoint, so it's okay to use the current date for Date Taken.



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.

There are only three fields to complete on the TouchPoint form, and all three are required.

Details

"Barriers Resolved" is used to make record of barriers being resolved, including the date and means of resolution. The TouchPoint includes a summary of the barriers/needs, broken down by category, listed on the Parent TouchPoint as a reference. The first field on the TouchPoint is the need being resolved. This is a dropdown list box with all of the needs listed (including needs not selected in the Parent TouchPoint).

You can record a TouchPoint for a barrier/need that you are working on but is not yet completely resolved, as well. An option group appears after the Need Being Resolved field that can be set to "In-Progress" or "Complete". The Date of Resolution appears only when "Complete" is selected for this field.

There is also a Date of Resolution and a free-text box to record details and comments regarding the resolved need. All three of these fields are required.

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 TouchPoint dashboard in the **Recent TouchPoints** Dashboard part.

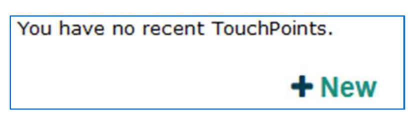
STEP-BY-STEP INSTRUCTIONS

Record New TouchPoint

1. You can only record or edit this TouchPoint from within any of the Agency's ETO Programs, including *Financial*, *Good Systems – BC Connect*, *Michigan Works! Southwest*, *Woman's Co-Op*, and *Work Hardening – Goodwill*. It can only be viewed (the TouchPoint dashboard can only be accessed from programs you have access to), 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. Access a "Needs Assessment" view table by the most convenient method you are familiar with. From the **Review TouchPoints** page, click on the dashboard icon in the last column of the TouchPoint listing or, from the Participant Dashboard, click on the dashboard link from the **Recent TouchPoints** dashboard part.

3. On the TouchPoint dashboard, click the **+New** link at the bottom-center of the **Recent TouchPoints** dashboard part.



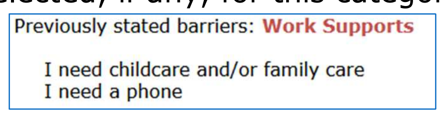
4. Complete the form as thoroughly as possible. The questions are described in detail below.

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 defaults to the current date, which is acceptable to use for this TouchPoint. *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*.

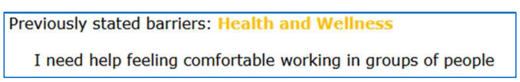
Previously stated barriers: **Workforce and Education**: This is a lookup field only. This section will show the needs selected, if any, for this category on the Parent TouchPoint, and is for reference only.

Previously stated barriers: **Financial**: This is a lookup field only. This section will show the needs selected, if any, for this category on the Parent TouchPoint, and is for reference only.

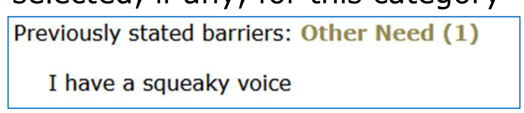
Previously stated barriers: **Work Supports**: This is a lookup field only. This section will show the needs selected, if any, for this category on the Parent TouchPoint, and is for reference only.



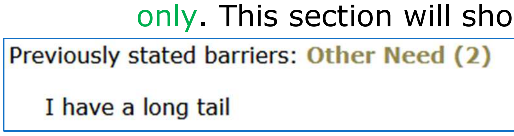
Previously stated barriers: **Health and Wellness**: This is a lookup field only. This section will show the needs selected, if any, for this category on the Parent TouchPoint, and is for reference only.



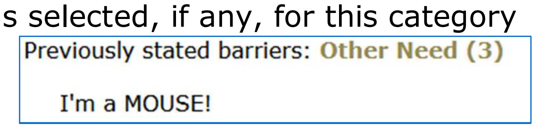
Previously stated barriers: **Other Need (1)**: This is a lookup field only. This section will show the needs selected, if any, for this category on the Parent TouchPoint, and is for reference only.

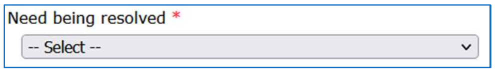


Previously stated barriers: **Other Need (2)**: This is a lookup field only. This section will show the needs selected, if any, for this category on the Parent TouchPoint, and is for reference only.

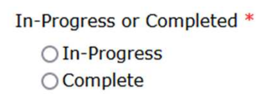


Previously stated barriers: **Other Need (3)**: This is a lookup field only. This section will show the needs selected, if any, for this category on the Parent TouchPoint, and is for reference only.

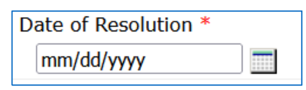




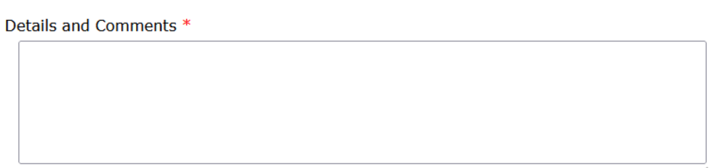
Need being resolved: This is an exclusive choice (can choose only one) drop-down list box with a list all the barriers listed on the "Needs Assessment" TouchPoint, broken into the categories. It is not a requirement that the need selected here as being resolved match a need from the Parent form, though it is best practice to keep the TouchPoints consistent. *Select the need being resolved from the list. This is a required field.*



In-Progress or Complete: This is an exclusive choice (can choose only one) option group with a pre-selected set of choices for the status of this barrier resolution, "In-Progress", and "Complete". This field allows you to make note of barriers—for yourself and for others to follow—that you've begun to work with but are not yet completely resolved. Select In-Progress if this is the case, and update it to "Complete" once the barrier/need is resolved. Selecting "Complete" for this field will cause another field, "Date of Resolution", to appear. *Click the radio button next to the appropriate choice to select. This is a required field*.



Date of Resolution: 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 when "Complete" is selected for the previous field, "In-Progress or Complete". This is the date you cleared the barrier for, or with, the Participant by whatever means. *Type the date directly into the box or use the calendar control on the right side of it to select the appropriate date. This is a required field*.



Details and Comments: This is a free-text field (2000 characters). *Type a brief explanation of the means by which this barrier/need was resolved, including what steps you or associates took to clear the barrier.* This might include any of a long list of possibilities. Be specific and give a complete answer that others will understand, but not with too much detail. *This is a required field*.

5. 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.