Description of iCare Templates:

The TEQ LIP (Toronto East Quadrant Local Immigration Partnership) is comprised of 40 different organizations. These organizations use over 15 different data management systems to input and store their data. At the end of every month, each organization exports their data from their data management system in the form of one or more iCare template. These templates are then submitted to the government and are necessary for the organization to receive funding.

Depending on what part of the process newcomers are in and what kind of service they are receiving, their information is displayed in the corresponding iCare template. We have shared all of these templates with you and will go further to provide a short explanation about when these templates are used.

In order to receive support services, newcomers must go through a certain standardized process.
This process can be split into two categories:

1. Initial Visit(s) - This process includes intake of newcomers basic information and referring newcomers to the services they need
2. Subsequent Visit(s) - This process includes providing newcomers support services

Below we describe this process in more detail and explain which templates are used at what times

Initial Visit(s)

1. **Client Profile Bulk Template:** This template displays information that is filled out by a front desk staff/receptionist when a client first seeks settlement services. The client's basic information is recorded and they are referred to a settlement worker. A clients information is displayed in this template a maximum of 1 time.
2. **Needs Assesment & Referral Service (NARS) Template:** This template displays information that is filled out by a settlement worker. The client's basic information is recorded alongside referrals for settlement services that suits the clients needs best. A clients information is displayed in this template a maximum of 1 time.

A client has two options: They can either go to a receptionist who refers them to a settlement worker OR they can skip the receptionist and go straight to the settlement worker. In the latter scenario, the client would not have any "Client Profile Bulk" template filled out for them.

Subsequent Visit(s)

After their initial visit(s), clients have the option of receiving services from the organizations they have been referred to.
There are a total of 4 different settlement service funding streams that are offered: Language Training services, Employment services, Community Connection services

and Information & Orientation services. Each funding stream has many different programs and services that fall under that funding category.
Some organizations offer only 1 of these 4 services, whereas other organizations offer multiple services.
Depending on what services the client is receiving, the client's information is displayed in the corresponding iCare template.

Here is a list of services offered and their corresponding templates:

1. Employment Related Services
   - **Employment Related Services Template**
2. Community Connections Services
   - **Community Connections Template**
3. Information & Orientation Services
   - **Information & Orientation Template**
4. Language Training Services
   - **Client Enrollment Template**
   - **Course Setup Template**
   - **Client Exit Template**

Example Scenarios:

1. An organization offers only employment-related service and a client comes in seeking that service. In this scenario, that clients information would be displayed in the employment-related services template.
2. An organization offers employment-related services, community connection services and information & orientation services. A client comes in seeking employment-related services and community connection services. In this scenario, the client's information would be displayed in both the employment-related services template and community connection services template (so that a client has a file, or row, in both templates).

At the end of every month, each organization submits their filled out templates to the iCare system. At the 1st of every month, the organizations start filling out a new template that doesn't have any prior clients information on it.
Each client can only have 1 file (or row) in each months iCare template. So if a client receives employment-related services from an organization twice in a certain month, the organization can only attribute 1 row in that template for their information. Some templates allow for the number of hours a client spends receiving services from that organization to be updated throughout the month while others do not.
However, if a client comes in once in a certain month and once again in the next month, then that client has a file (or row) in the iCare templates for both months (1 time in each).

We hope this information helps with your process of designing the software. If you have any questions about user capability, the kinds of reports we are looking for, further description of the data or anything else please stop by during our office hours.

We would also like to stress that as we proceed through the beginning stages of this project, we are continuously learning more about the user's skill set, the user's needs and the way they collect data - so it would be beneficial to stop by office hours throughout the semester to see what updates there are.