

INITIAL ASSESSMENT: DEMO SUGGESTIONS

Adding Education Details:

- **Data:** Select a customer that is currently on your caseload and add education details to the case.
- **Things to Point Out:**
 - The Education Details allows for entering and training and/or certifications that the customer has had prior to coming to Welfare Transition.
 - You can indicate the funding source that was used for previous training.

Adding Goals and Interests:

- **Data:** Select a customer that is currently on your caseload and add a goal(s) to the case. There are four different types of goals, but it is not necessary to enter information for four different types. The suggestion is to show data entry for an employment goal.
- **Things to Point Out:**
 - Users can specify whether a goal is a personal goal, an employment goal, an educational goal or an optimum health goal.
 - As goals are added, a running list will be kept at the top of the screen.
 - Users can specify whether the need/barrier should be generated to the IRP.
 - Link at the bottom of the page to Steps to Self Sufficiency.

Adding Needs and Barriers:

- **Data:** Select a customer that is currently on your caseload and add needs/barriers to the case.
 - **Things to Point Out:**
 - Users can specify whether the need/barrier should be generated to the IRP.
 - As goals are added, a running list will be kept at the top of the screen.
 - Link at the bottom of the page to Steps to Self Sufficiency.
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Adding Steps to Self Sufficiency:

- **Data:** Select a customer that is currently on your caseload and add steps to self sufficiency to the case. Try to make these steps relevant to any needs, barriers, goals or interests you have added to the customer's case.
- **Things to Point Out:**
 - The customer's list of steps will be generated to the IRP.
 - As steps are added, a running list will be kept at the top of the screen.

Adding Assessment Detail:

- **Data:** Select a customer that is currently on your caseload and schedule the customer for a TABE assessment.
- **Things to Point Out:**
 - If the assessment is being given by an external administrator, there are additional data fields to complete regarding the administrator's contact information.
 - When the status of the assessment is changed to 'Completed,' the case manager will be able to enter assessment results into a template specific to that test.

Adding/Editing an Assessment Outcome:

- **Data:** From the customer's Case Detail (used in the above example), select the link for the scheduled TABE test. Change the status of the test to 'Completed' and click 'Save' to continue to the assessment outcome template.
 - **Things to Point Out:**
 - Templates are included for the four most widely used tests (SAGE TFA, GATB, TABE, SDS)
 - For all other assessments, there is an 'Other' template used to capture scores.
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Adding a Supportive Service:

- **Data:** Select a customer that is currently on your caseload and schedule the customer for a supportive service (such as child care).

 - **Things to Point Out:**
 - The user is forced to conduct a search as the first step in adding a service in order to prevent duplicate entries into the database.

 - Once a provider is selected from the search results, a provider's information data is automatically populated to the customer's Service Detail record.
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