

# WRPD/ClientTrack

## User Manual

WI Refugee Programs Database (WRPD)/ClientTrack

Division of Family and Economic Security

Bureau of Refugee Programs

October 2024



Wisconsin Department of  
Children and Families

**Table of Contents:**

Navigation of Workspaces ..... 4

**Find Participant ..... 5**

Finding a Participant ..... 5

Participant Dashboard ..... 6

**Completing an Intake..... 7**

Intake & Assessment Workflow ..... 7

    Participant Intake Form ..... 10

    Family Members ..... 10

    Program Eligibility / Enrollment..... 11

    Finish the Workflow..... 12

Editing a Participant Intake Record ..... 13

**Family Members Management ..... 14**

Review Family Members ..... 14

Adding a Family Member..... 15

Family History ..... 16

Adding a Participant to Another Family ..... 17

Adding a Service for All Family Members..... 18

**Completing an Enrollment ..... 19**

View Enrollments ..... 19

Completing an Enrollment via Enrollments..... 20

**Services..... 21**

Adding a Service..... 21

    Adding RSI Services (Refugee School Impact program) ..... 23

    Adding RYM Services (Refugee Youth Mentoring program)..... 23

Viewing Participant Services ..... 24

    Edit a Service..... 25

**Quick Services for Multiple Clients ..... 26**

**RSI Grade Promotion (for Refugee School Impact program only) ..... 27**

Adding Grade Promotion for One Participant/Student: ..... 27

Adding Grade Promotion for Multiple Participants/Students: ..... 27

**Case Notes ..... 29**

Adding a Case Note..... 29

Case Note Restrictions ..... 30

Viewing/Editing/Printing a Case Note ..... 31

**Document Upload ..... 32**

Uploading a Document ..... 32

Downloading a Document.....	36
<b><i>Referrals</i> .....</b>	<b>38</b>
Recording a Referral.....	38
Adding a Referral Outcome .....	40
Editing a Referral .....	40
Incoming Referrals.....	40
<b><i>Help and Issue Ticket Submission</i> .....</b>	<b>43</b>
<b><i>The Family Self-Sufficiency Plan (FSSP)</i>.....</b>	<b>45</b>
Navigation .....	45
Creating a New FSSP.....	45
FSSP Follow-Ups: 6-Month, 12-Month and Other Revisions .....	57

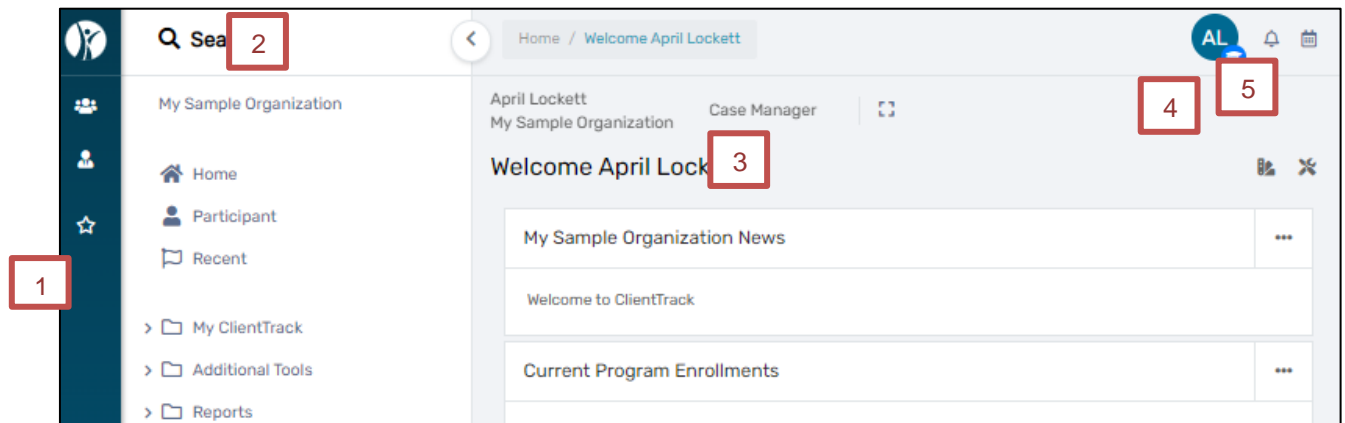
# Navigation

This functionality allows a ClientTrack user to navigate from one workspace dedicated to participants, users, reporting, and several other entities to another, according to the setup implemented for the workgroup.

## Navigation of Workspaces

When you first log in, you will be taken to the **Home Workspace**, identified in the top left of the screen.

Workspaces function similar to tabs on a web browser. Each Workspace will give you different Menu Groups and Options populated with the forms and functions relevant to the kind of work that Workspace is dedicated to. When you wish to work with Clients, including Client Intake, Assessment, etc., you will use the Client Workspace; when working with multiple Clients or running Reports, you will use the Home Workspace, and so forth.



Regardless of Workspace, the ClientTrack interface employs the following elements:

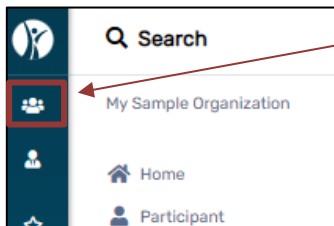
- 1. Main Menu**  
This menu allows you to access multiple tools you may need. The ClientTrack logo at the top will bring you back to your Home.
- 2. Global Search Bar**  
Searches both for data and Menu Options. Almost anything you will need can be navigated to from this search bar.
- 3. Entity Information**  
Displays information about the Workspace you're currently viewing.
- 4. User Icon**  
Selecting your User Icon will open a menu from which you can change your Workgroup, Organization, location, theme, and password.
- 5. Notifications**  
You'll be alerted to new notifications here.

# Find Participant

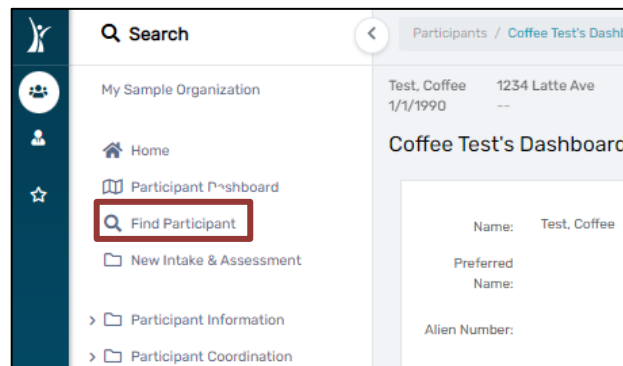
This functionality allows a ClientTrack user to search for and select participants that the user has access to according to the security model implemented for the organization.

## Finding a Participant

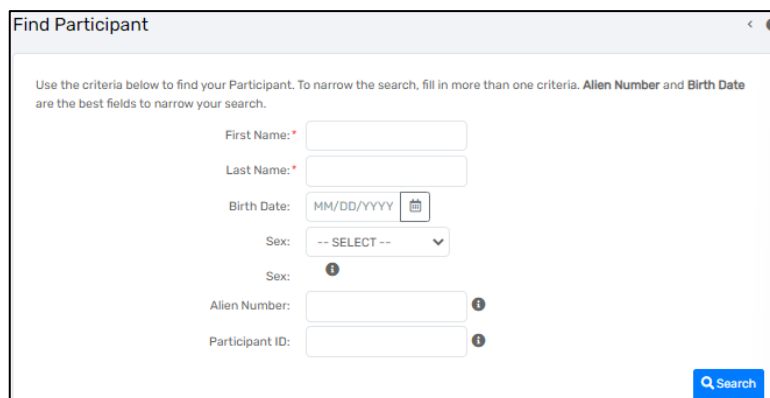
1. From the Main menu, you will click the icon for the **Participants** workspace.



2. Select **Find Participant** within the Participants menu on the left.



3. Determine the identifying information for search criteria and enter that information before selecting Search. If fields, other than first and last name, are left blank and Search is selected, a list of all participants the user is able to access will be displayed.



Find Participant

Use the criteria below to find your Participant. To narrow the search, fill in more than one criteria. **Alien Number** and **Birth Date** are the best fields to narrow your search.

First Name: \*

Last Name: \*

Birth Date: MM/DD/YYYY

Sex: -- SELECT --

Sex: ⓘ

Alien Number: ⓘ

Participant ID: ⓘ

Search

4. If several participants appear based on the search criteria, scroll through the list, and select the desired participant by clicking on any of their information on the form. The user will be directed to the selected participant's Dashboard.

3 results found.

First Name	Last Name	Middle Name	Birth Date	Sex	Date of Arrival or Status Granted	Alien Number	City	Resettlement Agency	Program (Enroll Date - Exit Date, Agency) ⓘ
Joe	Bond		01/15/2013	Male	07/01/2022		Greenfield		<ul style="list-style-type: none"> <li>* Refugee School Impact (RSI) (08/24/2022 - , Departm</li> <li>* Refugee School Impact (RSI) (08/15/2022 - , Departm</li> </ul>
Jane	Bond		12/10/1982	Female	07/01/2022		Greenfield	World Relief Fox Valley	<ul style="list-style-type: none"> <li>* Refugee School Impact (RSI) (08/24/2022 - , Departm</li> </ul>

## Participant Dashboard

1. The participant dashboard will display [Demographic](#) information for the client, their [Family Members](#), [Notifications](#), [Enrollments](#), [Services](#).
2. [Notifications](#) can be located by selecting the bell icon to the right of the client's name at the top of the screen.

**James Bond's Dashboard**

**Demographic Information:**

- Name: Bond, James
- Preferred Name:
- Alien Number:
- SSN:
- Sex: Male
- Birthdate: 1/1/1978
- Immigration Status: Ukrainian Humanitarian Parolee (UHP)
- Secondary Migrant: No
- Primary Language: Ukrainian
- Nationality: Ukraine

**Residential Address:** 789 60th St  
 Address 2:  
 City/County/State/Zip code: Greenfield, Milwaukee, WI 53220  
 County: Milwaukee

**Intake Information:**

- Intake Organization: Department of Children and Families
- Intake Date: Anwar Sallumi 07/15/2022
- Last Updated: Anwar Sallumi 08/11/2022

**Other Information:**

- PIN Number:
- CARES Case Number:
- USRAP Case Number:
- Participant ID:
- Relation to Head of Family:
- Date of Arrival in the USA:
- Date of Residency in Wisconsin:

**James's Photo**

**James's Family Members**

Name	Birthdate	Age	Sex	SSN	Alien Number	Relation to Principal Applicant
Bond, James	01/01/1978	45	Male			Principal Applicant
Bond, Jane	12/10/1982	40	Female			Spouse



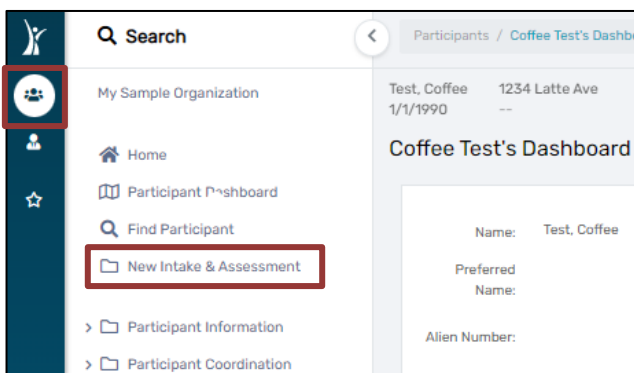
**Find a Participant:** Participant Workspace > Find a Participant > Participant Dashboard

# Completing an Intake

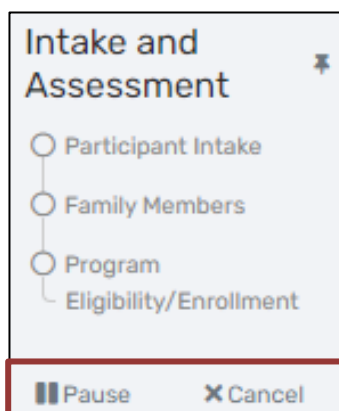
Intake functionality allows for a User to identify and add new participants to the system. An intake ensures that participants are input into the system so that demographics, enrollments, services and referrals can be attributed to the participant.

## Intake & Assessment Workflow

1. Navigate to the [Participant](#) workspace and select the [New Intake & Assessment](#) Menu Option.



2. Users should now see the [Intake & Assessment Workflow](#). There are two options beneath the workflow that will be available to users.
  - a. The first button is a [pause](#) button. The [pause](#) button will allow the user to pause the workflow, save the progress made, and return later.
  - b. The second button is a [cancel](#) button. The [cancel](#) button will allow the user to remove the progress made and exit the workflow.



3. Users will see three options for selecting a participant under the **Add New or Use Current** section: **Add a new participant**, **Use the current participant**, and **Select another participant**

to

4. Selecting the **Add a new participant** will allow the user to enter a brand-new participant

to the system.

- a. Users will be redirected to the Search Existing Participants page to search participants on **Last Name**, **First Name**, **Birthdate**, **Sex**, and/or **Alien Number**. After selecting **Next**, the system will search for potential participant record matches to avoid duplication of participants.
  - i. If no existing participants exist with the information entered, the user will be directed to the **Participant Intake** form.
  - ii. If a potential match is identified based on the search criteria, the user will have two options:
    1. Select a participant from the list of results. Users should only select a participant from the list of results when they are confident that they are the same participants based on information reflected in the record.
    2. Select **Next** to continue to the **Participant Intake** to enter a new participant.

**Please address the following:**

- Please review the list below for potential duplicates. Click **Next** if this is not a duplicate.

### Search Existing Participants

The first step in adding a new participant is to search existing participant records for possible matches to avoid duplicate entry. Enter partial identifying information on the participant, and then click **Next** to search from existing participant records.

If you are unsure of the Last Name and/or First Name, the wildcard of '%' can be entered in these required fields to allow for searching.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing participant record by clicking on that row.
- If there are no accurate matches, click **Next** again to continue to Step 2 in adding a new participant record.

Last Name: \*

First Name: \*

Birth Date:

Sex:

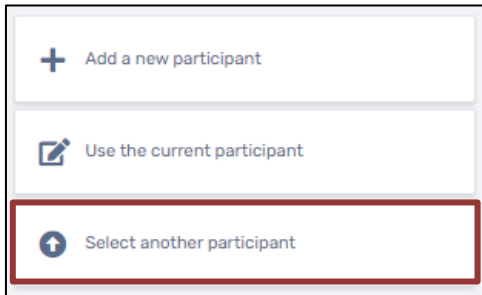
Alien Number:

2 results found.

Last Name	First Name	Birth Date	Sex	Date of Arrival or Status Granted	Alien Number	Resettlement Agency
Testerton	Testressa	04/06/1989	Female	02/07/2022	274-373-453	Ethiopian Community Development Council of Wausau



5. Selecting [Select another participant](#) will redirect the user to the [Find Participant](#) search form to search for the existing participant and link to their current record.



- a. By selecting a participant from the list of potential matches, the user will be directed to the [Participant Intake](#) form.
- b. If no potential matches appear, the user will need to cancel the workflow by selecting the x above the workflow and restarting it.

**Find Participant**

Use the criteria below to find your Participant. To narrow the search, fill in more than one criteria. **Alien Number** and **Birth Date** are the best fields to narrow your search.

Last Name: \*

First Name: \*

Birth Date:

Sex:

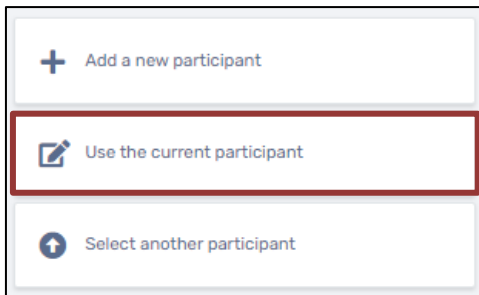
Alien Number:

Participant ID:

2 results found.

Last Name	First Name	Middle Name	Birth Date	Sex	Date of Arrival or Status Granted	Alien Number	City	Resettlement Agency	Program (Enroll Date - Exit Date, Agency)
Testerton	Testressa		04/06/1989	Female	02/07/2022	274-373-453	Wausau	Ethiopian Community Development Council of Wausau	* Refugee School Impact (RSI) (05/18/2022 -, Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 -, Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 -, Community Services Agency, Inc.) * RSS - Employment & Employability (04/18/2022 -, Multicultural Community Center)
Testerton	Tester		04/15/1988		02/07/2022	084-845-246	Wausau	Ethiopian Community Development Council of Wausau	* Refugee School Impact (RSI) (05/18/2022 -, Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 -, Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 -, Community Services Agency, Inc.) * RSS - Employment & Employability (04/18/2022 -, Multicultural Community Center)

6. Selecting [Use the current participant](#) will take the user to the [Participant Intake](#) form.



# Participant Intake Form

- 7. The [Participant Intake](#) form contains pages for [Participant Profile](#), [Family and Contact Information](#) and [Immigration & Demographics](#) pages.
  - a. Anything marked with a red asterisk will be required before the user can move forward in the [Participant Intake](#). Any fields not marked with the red asterisk are recommended and may be filled out if the information is available and applicable.
  - b. If all the required fields are filled in, the user may review, update and/or add information.
    - i. If updates or additions are required, the user may make those changes and select [Save](#) at the bottom of the page.
    - ii. If no updates or additions are required, the user may select [No Changes](#) to proceed forward in the workflow.

Participant Intake

Participant Intake ⓘ  
Complete the participant's identifying information.

Participant Profile  
GENERATING AN ALIEN NUMBER IN CLIENTTRACK IS ONLY ALLOWED IF THE PARTICIPANT HAS NOT YET BEEN ASSIGNED AN ALIEN NUMBER BY THE U.S. DEPARTMENT OF HOMELAND SECURITY. DCF WILL MONITOR ALL SYSTEM GENERATED ALIEN NUMBERS TO ENSURE THAT THIS FEATURE IS USED APPROPRIATELY.

First Name: \* James  
Last Name: \* Bond  
Middle Name:  
Preferred Name:  
Birth Date: \* 01/01/1978  
Birth Location: Not US Born  
Immigration Status: \* Ukrainian Humanitarian Parolee (UHP)  
Alien Number: ⓘ  
SSN: ⓘ  
PIN Number: ⓘ  
CARES Case Number:  
USRAP Case Number: ⓘ  
Participant Age: 45  
Organization: Department of Children and Families  
Intake Date: 07/15/2022

Family and Contact Information ⓘ

Save No Changes

# Family Members

- 8. The user will be directed to the [Family Members](#) section of the [Intake & Assessment Workflow](#). This form will display family members already associated to the participant record and allow users to review/add family members on the [Family Members](#) form.
  - a. If all family members are added and correct, select [Continue](#) to proceed.

Intake and Assessment

Bond, James 789 60th St  
1/1/1978

Participant Intake

Family Members

The members of the participant's current family are displayed below. To add a new family member, click [Add Family Member](#). To edit the family member's information, choose [Edit](#) next to the desired record.

+ Add Family Member

Name	Birthdate ⓘ	Age	Sex	SSN	Alien Number	Relation to Principal Applicant	Primary Language
------	-------------	-----	-----	-----	--------------	---------------------------------	------------------

# Program Eligibility / Enrollment

9. The user will be directed to [Program Eligibility/Enrollment](#) section of the [Intake & Assessment Workflow](#). This form will display programs that are available to enroll the participant into.

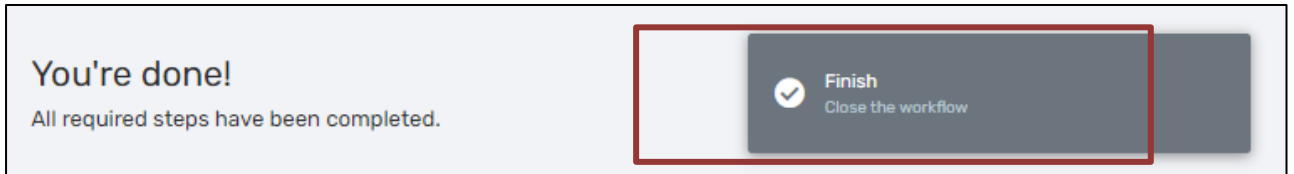
- a. The programs that have eligibility criteria will display as separate rows on the form. Each program should have an [Eligibility Result](#) available based on the information entered on the previous forms of the [Intake & Assessment Workflow](#)
- b. The checkbox at the top of the form will filter out programs that have no eligibility criteria.
- c. Users can select the [Eligibility Result](#) to see a pop-up window containing information regarding the eligibility criteria for the program.

- 10. If the participant should be enrolled into one of the programs, the user may select the [Arrow](#) in the row of the program the participant should be enrolled into.
  - a. The user will be redirected to the [Program Enrollment](#) form. Here, the user will be prompted to select the [Head of the Enrollment](#), [Enrollment Date](#), and select which family members to enroll.

11. Once the Program Enrollment fields are complete, select Save. Users will then be redirected back to the program eligibility screen to complete another enrollment.

## Finish the Workflow

12. If the participant should not be enrolled into one of the programs, the user may select Next to complete the Intake and Assessment Workflow without enrolling the participant.
  - a. The user should see the [Intake and Assessment](#) workflow have green checkmarks next to all the completed steps. The user may select [Finish](#) to close out of the [Intake and Assessment](#) workflow and return to the [Participant Dashboard](#).



**Completing an Intake:** *Participant Workspace > New Intake & Assessment Workflow > Add new participant / Use current participant / Find another participant > Family Members / Program Eligibility / Finish Workflow*

## Editing a Participant Intake Record

1. Find and select the desired participant using ClientTrack search functionality through the [Find Participant](#) menu option.
2. Once the correct participant is selected and appears in the Entity toolbar at the top of the page, select the [Participant Information](#) menu option. This opens a data entry form that allows the participant's data to be changed.
3. Add/update any participant data fields, as necessary.
4. Select [Save](#) to save the newly edited participant record.

Testerton, Testressa  
4/6/1989

Participant Intake

Participant Intake

Complete the participant's identifying information.

Participant Profile

GENERATING AN ALIEN NUMBER IN CLIENTTRACK IS ONLY ALLOWED IF THE PARTICIPANT HAS NOT YET BEEN ASSIGNED AN ALIEN NUMBER BY THE U.S. DEPARTMENT OF HOMELAND SECURITY. DCF WILL MONITOR ALL SYSTEM GENERATED ALIEN NUMBERS TO ENSURE THAT THIS FEATURE IS USED APPROPRIATELY.

Last Name: \* Testerton  
First Name: \* Testressa  
Middle Name:  
Preferred Name:  
Birth Date: \* 04/06/1989  
Birth Location: Not US Born  
Alien Number: \* 274-373-453  
SSN:  
PIN Number:  
CARES Case Number:  
USRAP Case Number: HB124235  
Participant Age: 33  
Organization: Multicultural Community Center

Save Cancel

**Edit a**



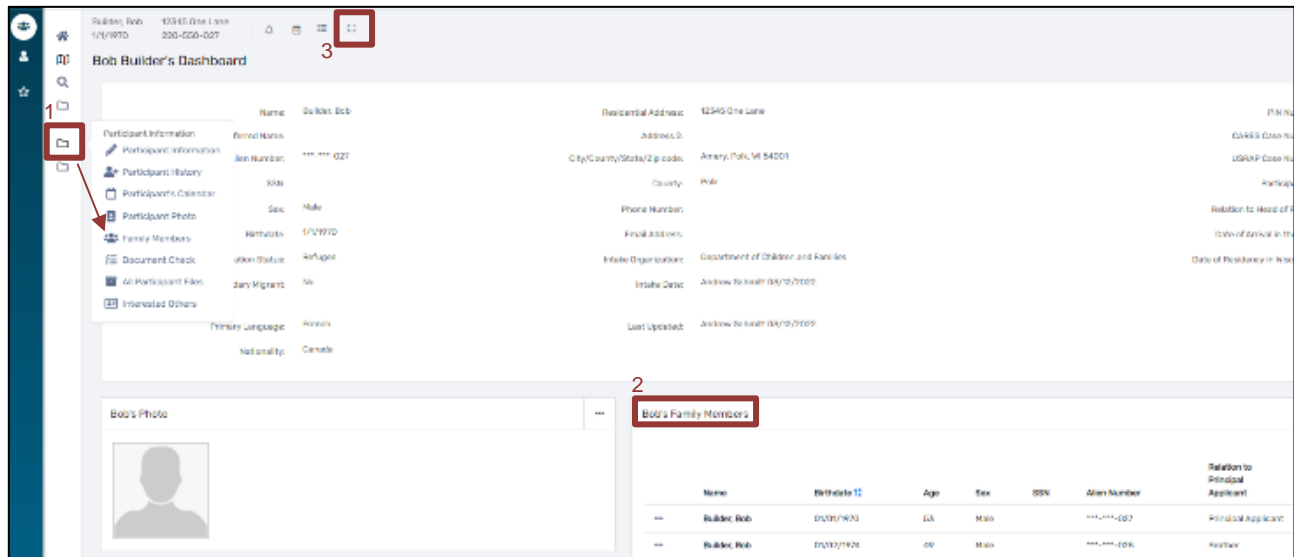
**Participant Intake Record:** Participant Workspace > Participant Dashboard > Participant Information

# Family Members Management

Family Members functionality allows for a User to view and add Family Members to the selected participant's current family. A Family is defined as any group of one participant or more.

## Review Family Members

[Family Members](#) can be reviewed and edited in various places through the system. All options will require the user to be in the [Participant Workspace](#), and the [Participant](#) to be in focus first.



### Option 1:

1. Navigate to the [Participant](#) workspace and select the [Participant Information](#) Menu Group, followed by the [Family Members](#) Menu Option.
2. This will redirect users to the [Family Members](#) screen where users will have multiple options to Add New, Select the participant, and/or Edit.

### Option 2:

1. Navigate to the [Participant](#) workspace and select the [Participant Dashboard](#) followed by the [Participants Family Members](#) dashboard section.
2. This will redirect users to the [Family Members](#) screen where users will have multiple options to Add New, Select the participant, and/or Edit.

### Option 3:

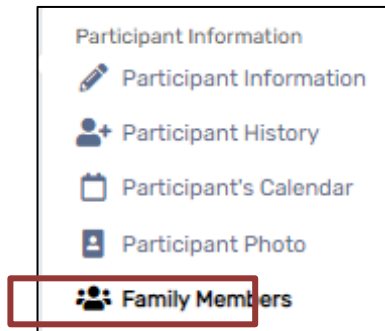
1. Navigate to the [Participant](#) workspace and select the [Expand](#) button on the Client's dashboard to the right of the participants name at the top left of the screen.
2. This will display each member of the [Family](#) and allow the user to select the name of each participant to be redirected to their [Participant Dashboard](#).

- a) Additionally, users will see options for adding [Case Notes](#), [Services](#), and viewing the participants' [Calendar](#). These options act as shortcuts to navigate to those forms for each client in the family.



## Adding a Family Member

1. Navigate to the [Participant](#) workspace and select the [Participant Information](#) Menu Group, followed by the [Family Members](#) Menu Option.



2. After navigating to the [Family Members](#) menu option, find the “Add Family Member” button at the top right of the page, above the existing family members.

The members of the participant's current family are displayed below. To add a new family member, click **Add Family Member**. To edit the family member's information, choose **Edit** next to the desired record.

+ Add Family Member

Name ▲	Birthdate ▲	Age ▲	Sex ▲	SSN	Alien Number	Relation to Principal Applicant ▲	Primary Language ▲
➤ Testerton, Tester	04/15/1988	34	Male		***-***-246	Self	Dari
➤ Testerton, Testressa	04/06/1989	33	Male		***-***-453	Spouse	Albanian, Gheg

3. Enter the [First Name](#), [Last Name](#) and [Birth Date](#) of the new family member. The system will alert users to potential matches. If there is a potential match, users may select that row which will open the existing participant record. If the system finds no potential matches, users will be taken to the next page.

**Family Member Information**

Search Existing Participants

The first step in adding a new family member is to search existing participant records for possible matches to avoid duplicate entry. Enter partial identifying information on the family member, and then click **Next** to search from existing participant records.

If you are unsure of the Last Name and/or First Name, the wildcard of '%' can be entered in these required fields to allow for searching.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing participant record by clicking on that row.
- If there are no accurate matches, click **Next** again to continue to Step 2 in adding a new participant record.

First Name: \*

Last Name: \*

Birth Date: MM/DD/YYYY

Sex: Female, Male, Transgender, Questioning, Data not collected

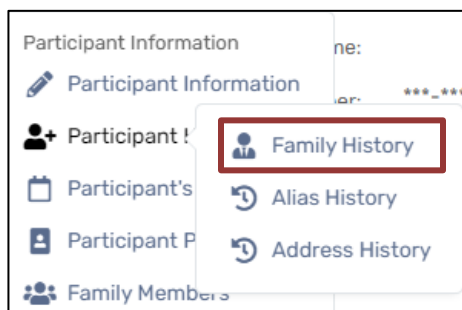
Alien Number:

4. Add/update data fields on the [Family and Contact Information](#) and [Immigration & Demographics](#) pages.
5. Select [Save](#) in the lower right-hand corner. The User will return to the Family Members form.

## Family History

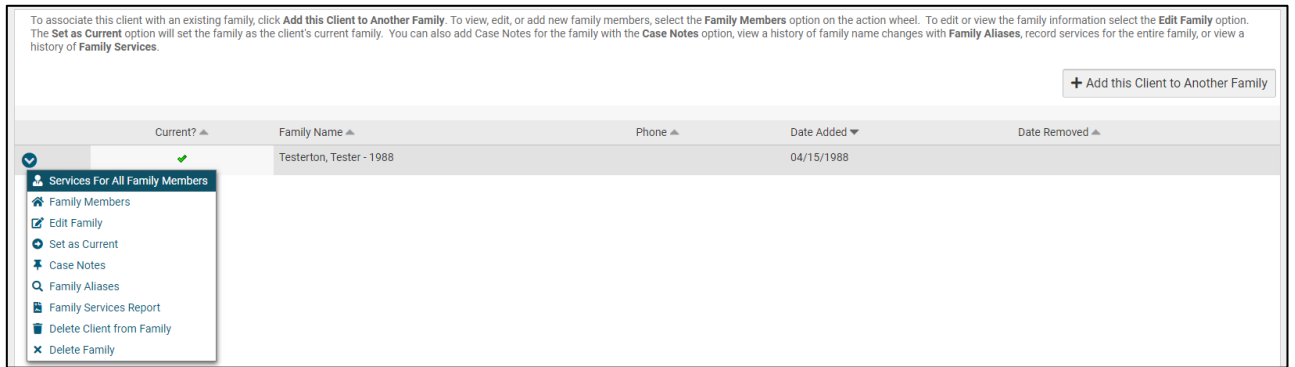
This functionality allows a User to view the selected participant's history of families they have been a part of. The Family History form also contains a button that allows the User to add the selected participant to another family.

1. From the [Participant Dashboard](#), find [Participant History](#) in the [Participant Information](#) menu group and navigate to the [Family History](#) option.



2. Users will see a row for each historical value the family member has. There is also an action button for each row that will provide the user an array of options.

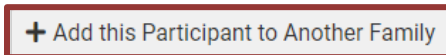




## Adding a Participant to Another Family

This functionality would be used when locating an individual who is entered separately, as their own family, but needs to be tied to an existing family.

1. From the **Family History** form, select **Add this Participant to Another Household** button, the user will be redirected to a data entry form.



2. Enter in the family name and select the **Lookup** icon (the magnifying glass to the right of the Family Name) and on the new form, find and select the household where the selected participant needs to be added.

Identify the client's family by clicking the **Lookup** icon. A new family can also be added by clicking the **Lookup** icon, then clicking the **Add New Family** button. After you've identified the family, verify that the contact information is correct. If it is not correct, please correct it below. Clicking **Set as Current Family** will tag this as the current family in family summary. Clicking **Remove Client from All Other Families** will remove the client from any other family.

Family Name: \*

Family Address:

Family Zip Code:

Family Home Phone:

Date Added: 05/18/2022

Relationship To Head of Household: \* --SELECT--

Relationship Type: --SELECT--

Set as Current Family:

3. Select the **Relationship To Head of Household** and, if applicable enter the **Relationship Type** and check the **Set as Current Family**.
4. Setting as **Current Family** will create this family as the primary family for the participant.
5. If you select **Set as Current Family**, you will see an additional question

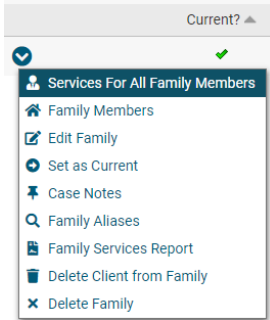
Set as Current Family:

**Remove Participant from all Other Families:**

6. Removing the participant from all other families will remove the participant from any other family and integrate the participants' record into the new family.

# Adding a Service for All Family Members

1. From the [Family History](#) form, select the Action Button to the left of the household that needs services added, followed by [Services For All Family Members](#).



2. The user will be redirected to the [Quick Services for All Family Members](#) form.

Use this form to assign a single service to multiple members of an enrollment case. Note that the only services you'll be able to assign are related to the program for the enrollment that you choose so therefore you must choose the enrollment first and then the service drop down list will be populated from your selection. Also note that the enrollment drop down list only shows enrollments that are associated to programs that have services that can be assigned.

Enrollment: \* Refugee School Impact (RSI) 05/18/2022 -  
Service: \* Tuition Assistance

2 results found.

<input type="checkbox"/>	Name ▲	Begin Date ▲	Comments ▲
<input type="checkbox"/>	Testerton, Tester	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Testerton, Testressa	<input type="text"/>	<input type="text"/>

3. Choose the [Enrollment](#) first, followed by the desired [Service](#).
4. Select [Search](#) to the right. This will search the selected enrollment for other enrolled Family Members.
5. Users may select the [Family Members](#) to apply the service to, enter the date and any comments.
6. Select [Save & Close](#) button, the user will be redirected to previous menu option.

# Completing an Enrollment

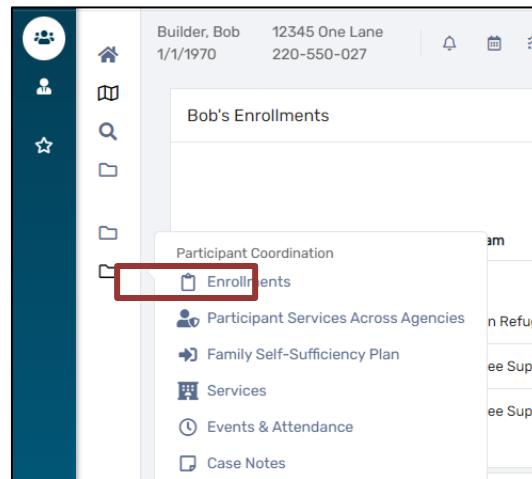
The Enrollment functionality allows for a user to enroll and associate a participant and family members to a specific program. A participant may have multiple enrollments over time where they may receive services and referrals.

## View Enrollments

1. Navigate to the [Participant](#) workspace and bring the correct participant into focus.
2. [Enrollments](#) can be viewed in two different ways:

Head of the Enrollment	Program	Approval Status	Members	Enroll Date	Exit Date	Exit Reason	Enrolling Agency	Enrolled By
Builder, Bob	Afghan Refugee Health Promotion (ARHP)	Approved	2	04/14/2023			Department of Children and Families	April Lockett
Builder, Bob	Refugee Support Services (RSS) - Other Services	Approved	2	08/12/2022			Department of Children and Families	Andrew Schmitt
Builder, Bob	Refugee Support Services (RSS) - ESL	Approved	2	08/12/2022			Department of Children and Families	Andrew Schmitt

- a) First, users may navigate to the [Participant Dashboard](#), locate the [Participants' Enrollments](#) and Click on the [Participant's Enrollments](#) header.
- b) Second, users may navigate to the [Participant Coordination](#) menu group and select the [Enrollments](#) menu option.



3. Both options will direct users to the [Enrollments](#) history form where users can View, Edit, or Add a New Enrollment.

## Completing an Enrollment via Enrollments

1. After navigating to the [Enrollments](#) form, the user will see a row representing each of the participants' previous and current enrollments.
2. Select [Add New Enrollment](#).

All client enrollments display below with current enrollments listed at the top. To add a new enrollment for the client, select [Add New Enrollment](#). Note that editing, reentering or deleting an enrollment will not affect the other members of the case. Enrollment changes need to be made for each case member individually.

[+ Add New Enrollment](#)

2 results found.

Head of the Enrollment ▲	Program ▲	Approval Status ▲	Members ▲	Enroll Date ▼	Exit Date ▲	Exit Reason ▲	Enrolling Agency ▲	Enrolled By ▲	Primary Case Manager ▲
Current									
Testerton, Tester	Refugee School Impact (RSI)	Approved	2	05/18/2022			Community Services Agency, Inc.	Jessica Fleming	Jessica Fleming
Testerton, Tester	Refugee School Impact (RSI)	Approved	2	05/18/2022			Community Services Agency, Inc.	Jessica Fleming	Jessica Fleming

3. The user will be redirected to the [Program Enrollment](#) page.

Please select the program to enroll the members of this case into. Choose one family member as the Head of the Enrollment and then select the other family members that will be included in the enrollment.

Program: Refugee School Impact (RSI) ▼

Head of the Enrollment: Testerton, Tester ▼


Enrollment Date: 05/18/2022 📅

### Case Members

Identify which family members are included in this case below.

<input type="checkbox"/>	Participant Name ▲	Age ▲	Eligibility Status	Participant ID ▲	Case Manager* ▲
<input checked="" type="checkbox"/>	Testerton, Tester	34	✓ Passed	72	<span style="border: 1px solid gray; padding: 2px;">Jessica Fleming 🔍</span>
<input checked="" type="checkbox"/>	Testerton, Testressa	33	✓ Passed	73	<span style="border: 1px solid gray; padding: 2px;">Jessica Fleming 🔍</span>

# of Case Members: 2 ⓘ


  
Save Cancel

4. From the Program Enrollment form, users should select the [Program](#), [Head of the Enrollment](#), [Enrollment Date](#) and the [Family Members](#) that should be included in the enrollment.
  - a. When the program is selected, the user should see the [eligibility status](#) in the [Case Member](#) table will update based on the participants eligibility for each family member.
5. Select [Save](#) and the user will be redirected back to the [Participant](#) Dashboard and the participants Enrollments should now be visible.



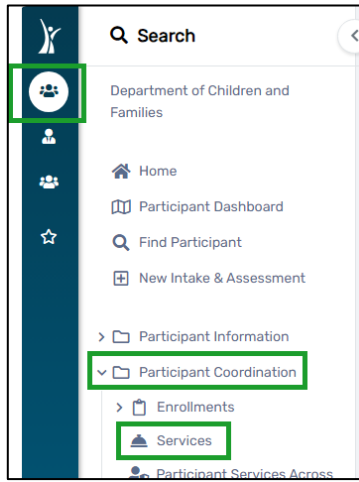
**Completing an Enrollment:** *Participant Workspace > Participant Coordination > Enrollments > Add a New Enrollment*

# Services

Services functionality allows for a user to record and add services that were provided to the participant during their enrollment and participation in the program.

## Adding a Service

1. Navigate to the [Participant](#) workspace, find the [Participant Coordination](#) menu group, and select the [Services](#) menu option.



2. Click the [Add New Service](#) button in the right-hand corner to proceed.

[+ Add New Service](#)



The **"Add New Service"** form will open:

Add New Service

Enter the information about the service provided to the participant/client below. For the **Program Enrollment** field, only the programs that the participant client is enrolled in will appear.

**NOTE:** To quickly and easily add a service to multiple participants/clients at the same time, navigate to the "Home" workspace and select the "Quick Services - Multiple Clients" menu item.


Add the "Service Date" below first to proceed:


Service Date: \* 09/04/2024  

Program Enrollment: \* -- SELECT --

Service: \* -- SELECT --

Staff Provided the Service: \* Anwar Sallumi


Associated Goal: \* -- SELECT -- 

Associated Barrier: \* -- SELECT -- 

Comment/Case Note Requirement

Certain services require a comment or case note to verify and explain the service provided. Please refer to the most recent Policy Manual or relevant Operations Memo for a list of services that require a comment or case note.



Comments:





3. In the **Service Date** field, add the actual date when the service was provided. A future date is unallowable. If you do not add a date, both the **Program Enrollment** and **Service** fields will be invisible/unavailable in the form, and you will not be able to add a service.
4. It is required to select a **Program Enrollment** and **Service** from the drop-down lists. If no Program Enrollment is listed, that means the participant/client is not enrolled in any programs, and they need to be enrolled prior to adding the Service.
5. The **Staff Provided the Service** field shows the name of the user/staff who logged in the system by default. Some agencies may have a data entry staff who is dedicated to complete and enter all data in the system on behalf of other staff. So, this name may not be the correct name of the actual staff who provided/delivered the service to the participant/client. If needed, choose from the drop-down list the name of the actual staff who provided the service.
6. If applicable and needed, select the corresponding **Associated Goal** and **Associated Barrier** from the drop-down lists. As with the Program Enrollment list, missing Goals and Barriers will need to be added prior to adding the Service, they are not required though.
7. It is required to add a **Comment** or a **Case Note** for a number of services. If the user selects one of the services that require adding a Comment or Case Note (like the one in the example below), the **Comment** box becomes a required field, and the Comments/Case Note Requirement text will be changed to give more info. In such case, the form will not be saved before adding a comment. If the user prefers to add a Case Note, they should write "**See Case Note**" in the **Comment** box (for more information about how to add a case note, check the section "**Case Notes**").


**Add New Service**



Enter the information about the service provided to the participant/client below. For the **Program Enrollment** field, only the programs that the participant client is enrolled in will appear.  
**NOTE:** To quickly and easily add a service to multiple participants/clients at the same time, navigate to the "**Home**" workspace and select the "**Quick Services - Multiple Clients**" menu item.



Service Date: \* 07/10/2024  

Program Enrollment: \* 07/18/2023 - 08/30/2024 - Refugee Support Services (RSS) - Other Services 

Service: \* RSS-OS: Case Management (Referral) 

Staff Provided the Service: \* Anwar Sallumi 


Associated Goal: -- SELECT --  

Associated Barrier: -- SELECT --  

**Comments/Case Note Requirement**

This service requires a service comment or a case note. The "**Comments**" box below is now required. If you prefer to write a case note instead of a service comment, please write "**See Case Note**" in the Comments box. You must then visit the "**Case Notes**" area for this client and add a new case note as required for this service.

Comments: \*



8. Click **Save**.

- Once the service has been added, it will display on the Services history form, where additional options may be available like editing or deleting the service.

Client Services

The participant's service history displays below. To record a service, click **Add New Service**. To edit or view an existing service, click **Edit Service** next to the record.

**+ Add New Service**

1 result found.

Date	Service	Units	Associated Enrollment	Agency
September 2022 (1 Services)				
09/22/2022	RSS OS - Child Care	1.00	Refugee Support Services (RSS) - Other Services	Department of Children and Families

## Adding RSI Services (Refugee School Impact program)

To add a new RSI service, the user follows the same steps of “**Adding a Service**” above. The only one minor difference is that once the user selects any Service of the **Refugee School Impact (RSI)** program, the required field **RSI Service Provided By** appears, and the user should select an option from the drop-down list. The user should complete the other fields and save the form.

Service Date: \* 07/10/2024

Program Enrollment: \* 08/01/2022 - Refugee School Impact (RSI)

Service: \* RSI - Orientation

RSI Service Provided By: \* -- SELECT --



Staff Provided the Service: \* -- SELECT --


Associated Goal: Elementary School (Grades K-5) Middle School (Grades 6-8) High School (Grades 9-12) Community Based Organization Literacy Agency


Associated Barrier:


## Adding RYM Services (Refugee Youth Mentoring program)

To add a new RYM service, the user follows the same steps of “**Adding a Service**” above. The only one minor difference is that once the user selects any Service of the **Refugee Youth Mentoring (RYM)** program, the required field **RYM Service Provided By** appears, and the user should select an option from the drop-down list. The user should complete the other fields and save the form.



Service Date: \* 07/10/2022  

Program Enrollment: \* 05/16/2022 - 08/25/2022 - Refugee Youth Mentoring (RYM) 

Service: \* RYM - Orientation 

RYM Service Provided By: \* -- SELECT -- 

Staff Provided the Service: \* -- SELECT --

Associated Goal: Elementary School (Grades K-5)  





Associated Barrier: Middle School (Grades 6-8)  
High School (Grades 9-12)  
Community Based Organization  
Literacy Agency

## Viewing Participant Services

Services can be viewed and edited in various places in the system.

### 1. Participant Dashboard:

- a. In the [Participant](#) workspace, locate/select the participant into focus and navigate to the [Participant Dashboard](#).
- b. Services that have been entered for the participant will display in the [Services](#) section of the dashboard.
- c. Users can also select the [Participant Services](#) header where they will be redirected to the [Services](#) history form.

Bob's Services					
1 result found.					
Date 	Service	Units	Associated Enrollment	Agency	
 September 2022 (1 Services)					
 	09/22/2022	RSS OS - Child Care	1.00	Refugee Support Services (RSS) - Other Services	Department of Children and Families
			1.00		

### 2. Services History Form

- a. Users can also view the existing services by navigating to the [Participants](#) workspace, the [Participant Coordination](#) menu group, and [Service](#) menu option. This will direct the user to the [Services](#) history form.

### 3. Participant Services Across Agencies

- a. With the appropriate participant in focus, navigate to the [Participant Coordination](#) menu group and select [Participant Services Across Agencies](#).
- b. The user's agency may determine which services are available to be seen.



## Participant Services Across Agencies

Displays services a participant has received from all agencies.

Date of Service Between:  and

Service:

Agency:

19 results found.

Program Name	Date of Service	Service	Agency
Refugee Support Services (RSS) - Other Services	12/14/2023	RSS ESL - ESL	Lutheran Social Services of Wisconsin & Upper Michigan Inc (Milwaukee)
Refugee Medical Screening (RMS)	10/05/2023	RMS - Interpretation/Translation	International Institute of Wisconsin

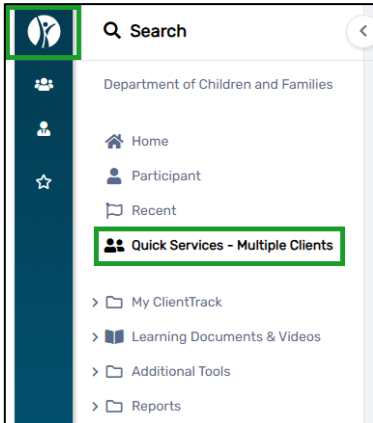
## Edit a Service

1. Select the [Edit](#) option from the Action button on the row of the Service the user would like to edit.
2. Selecting [Edit](#) will direct the user to the appropriate Service where appropriate information may be updated or changed.
3. Select [Save](#).
4. The updated information will reflect on the appropriate [Services](#) history form.

# Quick Services for Multiple Clients

The user can quickly add one Service to multiple clients using **Quick Services for Multiple Clients**.

1. Navigate to the [Home](#) workspace and select the [Quick Services - Multiple Clients](#) menu item.



2. The user gets the same form **Add New Service** mentioned above but has an additional lower section that lists participants' information.
3. In the [Service Date](#) field, add the actual date when the service was provided. A future date is unallowable. If you do not add a date, both the [Program Enrollment](#) and [Service](#) fields will be invisible/unavailable in the form, and you will not be able to add a service.
4. Select a program from the drop-down list to pre-populate rows with participants who are already enrolled and active in the selected program.
5. Select a specific service from the drop-down list and complete the other required fields.
6. The [Staff Provided the Service](#) field should list the name of the actual staff who provided the service to the participant/client. Choose from the drop-down list the correct name of the staff if needed.
7. Check the box next to each participant who you want to record and add the service to.
8. Select [RSI](#) or [RYM Service Provided By](#) if RSI or RYM programs were selected.
9. Select [Associated Goal](#) or [Associated Barrier](#) as needed from the dropdown lists.
10. Click [Save](#) or [Save & Close](#).

The screenshot below shows the lower section of the **Quick Services for Multiple Clients** form where participants who are enrolled in the selected program will be listed.

<input type="checkbox"/>	Client*	RSI Service Provided By*	RYM Service Provided By*	Enrollment*
<input checked="" type="checkbox"/>	Bond, Joe			02/14/2024 - Refugee Support Services (RSS) - Other Services
<input type="checkbox"/>	Bond, Liz			02/14/2024 - Refugee Support Services (RSS) - Other Services
<input checked="" type="checkbox"/>	Fus, Ru			06/03/2024 - Refugee Support Services (RSS) - Other Services
<input checked="" type="checkbox"/>	Hamad, Fatimah			04/06/2022 - Refugee Support Services (RSS) - Other Services
<input checked="" type="checkbox"/>	Hamad, Jamal Bin			06/24/2022 - Refugee Support Services (RSS) - Other Services
<input type="checkbox"/>	Hamad, kamal			04/06/2022 - Refugee Support Services (RSS) - Other Services

# RSI Grade Promotion

(for Refugee School Impact program only)

**Grade Promotion** should be reported/added for **Refugee School Impact (RSI)** participants/students only. There are two methods to add and report RSI Grade Promotion, one method is for one participant/student only, while the other method is for multiple participants/students at the same time.

## Adding Grade Promotion for One Participant/Student:

1. Navigate to the [Participant](#) workspace, find the [Participant Coordination](#) menu group, and click on the [RSI Grade Promotion](#) menu option.
2. For the “**Program Enrollment**” field, choose “**Refugee School Impact (RSI)**” from the dropdown list.
3. For the “**Grade Promotion**” field, choose “**RSI – Grade Promotion**” from the dropdown list.
4. For the “**Grade Promotion Date**” field, add the date when the participant/student’s grade got promoted.
5. For the “**RSI Provided By**” field, choose from the dropdown list the agency type for the RSI provider.
6. Add a comment as needed.
7. Click “**Save**” button.

Department of Children and Families

Bond, Joe 789 60th St  
1/15/2013 --

RSI Grade Promotion

Enter the information about the RSI Grade Promotion to this participant/student. For the **Program Enrollment** field, choo

**NOTE:** To quickly and easily add RSI Grade Promotion to multiple participants/students at the same time, navigate to the **Students** menu item.

2 Program Enrollment: \* 08/24/2022 - Refugee School Impact (RSI)

3 Grade Promotion: \* RSI - Grade Promotion

4 Grade Promotion Date: \* 06/12/2024

5 RSI Provided By: \* -- SELECT --

Comments: -- SELECT --  
Elementary School (Grades K-5)  
Middle School (Grades 6-8)  
High School (Grades 9-12)  
Community Based Organization  
Literacy Agency

1 ↑ RSI Grade Promotion

## Adding Grade Promotion for Multiple Participants/Students:

1. Navigate to the [Home](#) workspace, find click the [RSI Grade Promotion for Multiple Students](#) menu option. Once you open this form, your agency’s RSI active participants/students will be listed. If you did not find this list, click on the “**Search**” blue button on the right side.
2. For the “**Grade Promotion Date**” field, add the date when the participants/students’ grade got promoted.

3. For the **“RSI Provided By”** field, choose from the dropdown list the agency type for the RSI provider.
4. Add a comment as needed.
5. Check the small box in front of each participant/student who you want to report their RSI Grade Promotion. Leave others’ boxes unchecked if you do not want to report RSI Grade Promotion for them. Make sure that **“Refugee School Impact (RSI)”** is listed in the **“Enrollment”** field, if not then you can click on the dropdown list and choose it.
6. Click **“Save”** button.

Milwaukee Public Schools

Anwar Sallumi  
Milwaukee Public Schools DCF Administrator

### RSI Grade Promotion for Multiple Students

This form may be used to quickly add RSI Grade Promotion to multiple students. Simply check the box next to each client who you want to record and add the RSI Grade Promotion to. Click "Save" or "Save & Close".

Grade Promotion Date: 06/12/2024

RSI Provided By: -- SELECT --

Comments: -- SELECT --  
 Elementary School (Grades K-5)  
 Middle School (Grades 6-8)  
 High School (Grades 9-12)  
 Community Based Organization  
 Literacy Agency

**Select Clients**

Clients with a current enrollment in the program you selected above should appear below. Select any/all clients to record the above service. All details above will be recorded for each client you select.

15 results found.

Client	Enrollment
<input checked="" type="checkbox"/> Bond, Liz	02/08/2024 - Refugee School Impact (RSI)
<input type="checkbox"/> [Name obscured]	06/05/2022 - Refugee School Impact (RSI)
<input checked="" type="checkbox"/> HaleetTest, Amir	10/11/2021 - Refugee School Impact (RSI)
<input checked="" type="checkbox"/> HaleetTest, Baraa	10/11/2021 - Refugee School Impact (RSI)
<input checked="" type="checkbox"/> Hamad, kamal	09/12/2023 - Refugee School Impact (RSI)
<input type="checkbox"/> Hamad, kamal	09/12/2023 - Refugee School Impact (RSI)

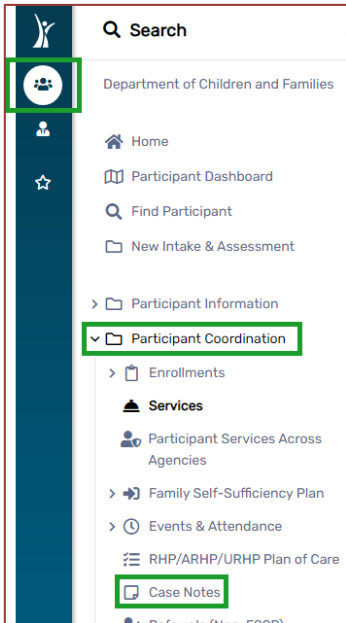
Save Save & Close Cancel

# Case Notes

Case Note functionality allows a user to add a case note to document and give more information and details on service provision, participants' engagement in programs, and progress over time.

## Adding a Case Note

- 1- Navigate to the [Participant](#) workspace, find the [Participant Coordination](#) menu group, and select the [Case Notes](#) menu option.



- 2- A list of the participant/client's case notes history appears.

Participant Case Notes

The participant's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click the blue arrow to the left of the record, then click **Edit Case Note** from the list that appears next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.

[+ Add New Case Note](#) [Print Selected](#)

4 results found.

Date	Regarding	User	Updated Last By	Last Updated Date	Organization	Print
04/06/2023	transportation			04/06/2023 1:24PM		<input type="checkbox"/>
03/31/2023	translation			03/31/2023 6:03PM		<input type="checkbox"/>
03/31/2023	Transportation			03/31/2023 5:27PM		<input type="checkbox"/>
03/28/2023	Transportation			03/28/2023 2:14PM		<input type="checkbox"/>

- 3- Click the [Add New Case Note](#) button in the right-hand corner to proceed. The “**Add New Case Note**” form will open:

', 'Restriction:  Restrict To Organization', ' Restrict To User', and ' Restrict to MOU/Info Release'."/>

- 4- The [Staff Initiated the Case Note](#) field shows the name of the user/staff who logged in the system by default. Some agencies may have a data entry staff who is dedicated to complete and enter all data in the system on behalf of other staff. So, this name may not be the correct name of the actual staff who would add/write the Case Note to the participant/client. If needed, choose from the drop-down list the name of the actual staff.
- 5- Complete all other required fields and click the [Save](#) button.

## Case Note Restrictions

The Case Note form has options for restrictions and to make a case note more appropriate for confidential purposes:

' and 'Restriction:  Restrict To Organization', ' Restrict To User', and ' Restrict to MOU/Info Release'."/>

- If the check box [Read Only](#) is checked, no one can edit the case note.

- The Restriction radio buttons allow the user to select one of the three restriction options:
  - [Restrict To Organization](#) makes the case note available and viewable only by the organization/agency's staff, none from other organizations/agencies can view and read the case note.
  - [Restrict To User](#) makes the case note available and viewable only by the user/staff who add the case note, and no other users/staff from the same organization/agency can view and read the case notes.
  - [Restrict to MOU/Info Release](#) makes the case note available and viewable only by the users/staff of the organizations/agencies that share a Memorandum of Understanding (MOU) or Release of Information agreement that allows sharing the data/info of this specific participant/client (or all participants/clients) among other organizations/agencies that have signed the MOU or agreement.

## Viewing/Editing/Printing a Case Note

- 1- Navigate to the [Participant](#) workspace, find the [Participant Coordination](#) menu group, and select the [Case Notes](#) menu option.
- 2- The list of the participant/client's case notes history appears.

The participant's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click the blue arrow to the left of the record, then click **Edit Case Note** from the list that appears next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.

**The Action button to view or edit the case note**

**4 results found.**

Actions for transportation	Date	Regarding	User	Updated Last By	Last Updated Date	Organization	Print
...	04/06/2023	transportation			04/06/2023 1:24PM		<input type="checkbox"/>
...	03/31/2023	translation			03/31/2023 6:03PM		<input type="checkbox"/>
...	03/31/2023	Transportation			03/31/2023 5:27PM		<input type="checkbox"/>
...	03/28/2023	Transportation			03/28/2023 2:14PM		<input type="checkbox"/>

**Select a case note to print out**

- 3- Click the [Action](#) button (...) on the left of a case note to get options to view, edit, or delete the case note.
- 4- Check the box on the right side of a case note and click the [Print Selected](#) button to print out the case note.



**Viewing/Editing/Printing a Case Note:** *Participant Workspace > Participant Coordination > Case Notes*

# Document Upload

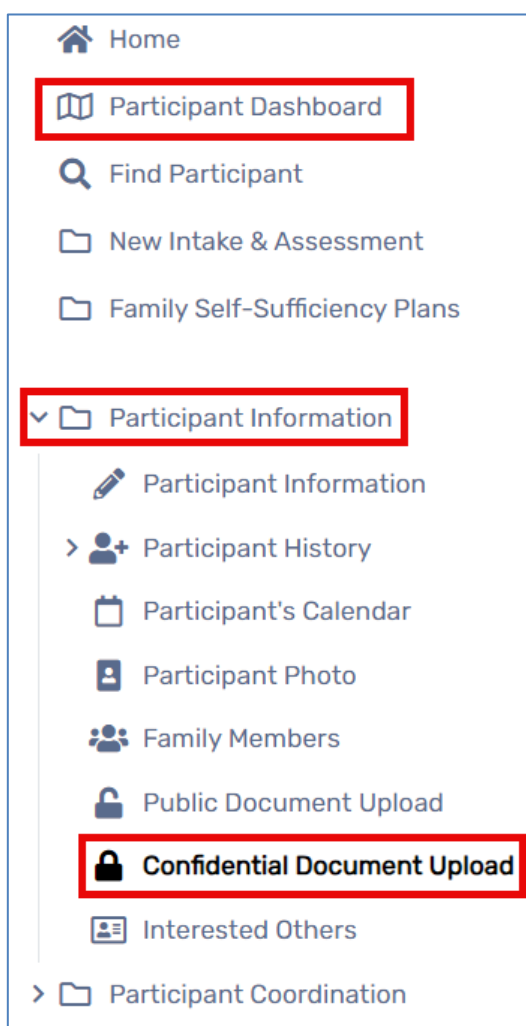
Document upload functionality allows a user to upload documents in any format and save them in the system.

## Uploading a Document

There are two types of documents to upload in the system, confidential and public documents.

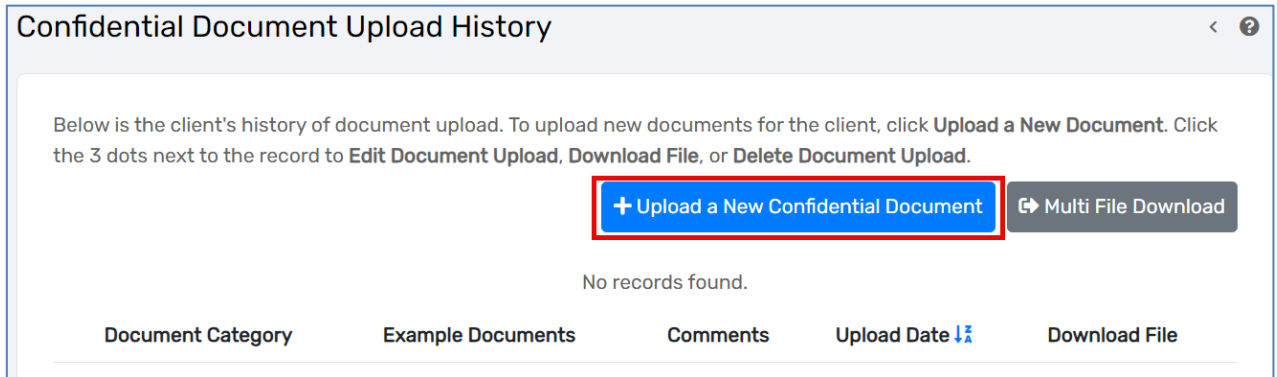
- a. **Uploading Confidential Document:** It is a private document, like medical or legal one, that an agency does not want to share with other agencies. This type of document can be seen by and available for only the agency that uploads the document. However, if the current/selected participant's record has been already shared with any other agency(s) using **Information Release Exceptions** function, the other agency(s) can also see and download the uploaded confidential documents. To upload a confidential document:

1. Navigate to the [Participant](#) workspace, find the [Participant Information](#) menu group, and select the [Confidential Document Upload](#) menu option.

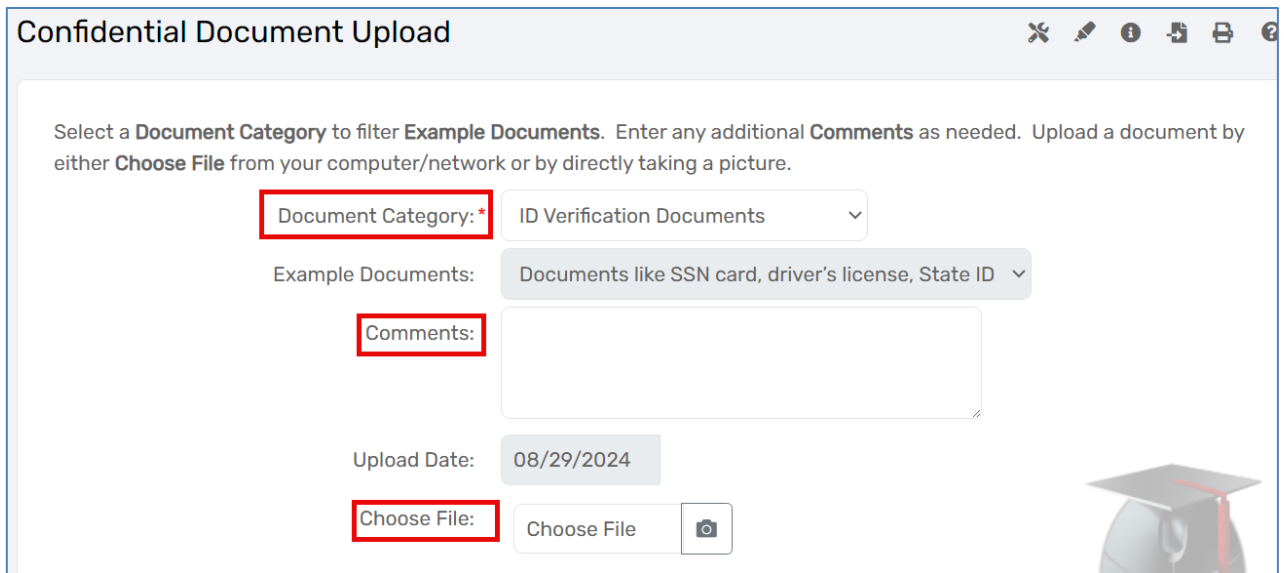




2. Click on [Upload a New Confidential Document](#) button.



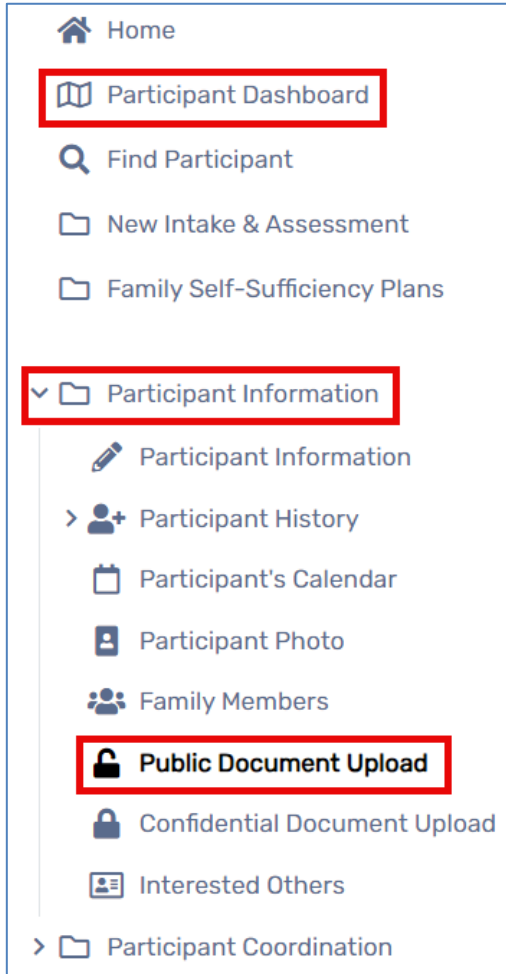
3. Select an option from the [Document Category](#) drop-down list to filter the [Example Documents](#) field. Each option in the [Document Category](#) drop-down list automatically populates the [Example Documents](#) field and gives examples of documents for upload. Add a comment if necessary to give more details on the uploaded document.



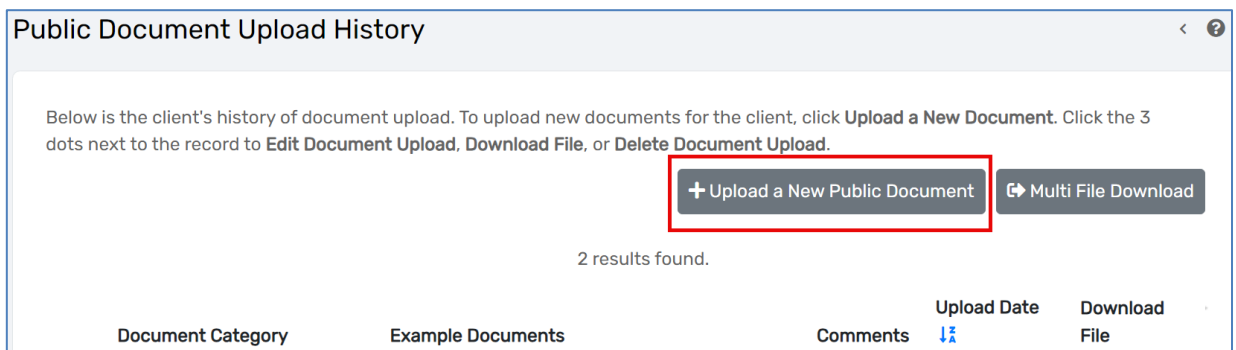
4. Click on [Choose File](#) to upload a document from your device. You can also click on the camera icon to take a photo for the document you want to upload, this works using a computer camera, a mobile phone, or a tablet.
5. Click [Save](#) after uploading the document.

**b. Uploading Public Document:** This type of document can be seen by and available for all agencies:

1. Navigate to the [Participant](#) workspace, find the [Participant Information](#) menu group, and select the [Public Document Upload](#) menu option.



2. Click on [Upload a New Confidential Document](#) button.



3. Select "Yes" from the drop-down list if you are certain and would like to upload a document that will be seen and downloaded by all agencies.

Public Document Upload

**IMPORTANT: You are about to upload a document that will be seen and downloaded by all other agencies.**

Would you like to Proceed Uploading a Public Document?: -- SELECT --

- SELECT --
- Yes
- No

4. If you select "Yes", you can proceed to upload a document.
5. Select an option from the [Document Category](#) drop-down list to filter the [Example Documents](#) field. Each option in the [Document Category](#) drop-down list automatically populates the [Example Documents](#) field and gives examples of documents for upload. Add a comment if necessary to give more details on the uploaded document.
6. Click on [Choose File](#) to upload a document from your device. You can also click on the camera icon to take a photo for the document you want to upload, this works using a computer camera, a mobile phone, or a tablet.

Confidential Document Upload


Select a **Document Category** to filter **Example Documents**. Enter any additional **Comments** as needed. Upload a document by either **Choose File** from your computer/network or by directly taking a picture.


**Document Category:** ID Verification Documents

**Example Documents:** Documents like SSN card, driver's license, State ID

**Comments:**

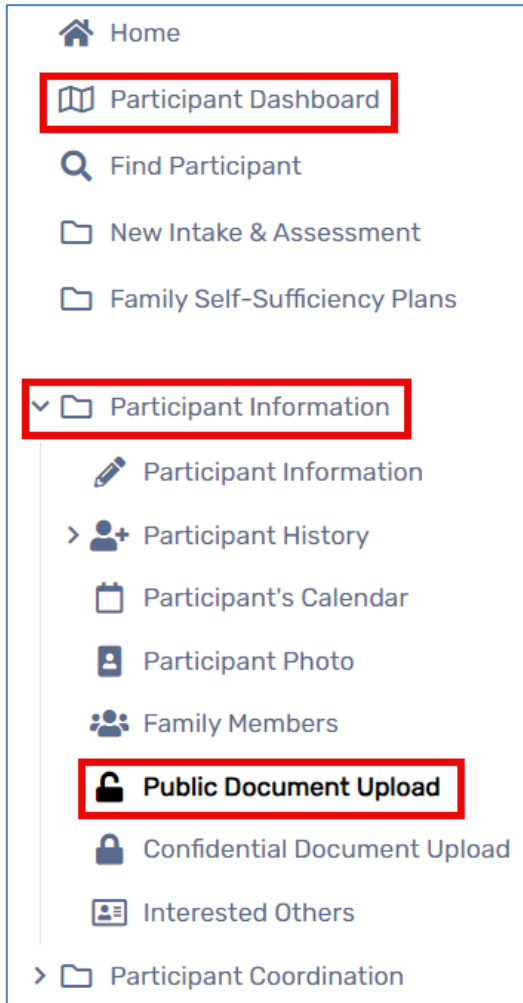
**Upload Date:** 08/29/2024

**Choose File:** Choose File 



## Downloading a Document

1. Navigate to the [Participant](#) workspace, find the [Participant Information](#) menu group, and select the [Public Document Upload](#) menu option.



2. You will get a list of all uploaded documents for the selected participant. There are two ways to download documents from the list:
  - a. Either to download one specific document by clicking the action button (the 3 dots), and then select "Download File". The file/document will be saved in your device.

+ Upload a New Public Document
Multi File Download

6 results found.

Document Category	Example Documents	Comments	Upload Date	Download File
*** Immigration-Related Documents Edit Document Upload Download File	Documents like I-94, passport with eligible stamps, EAD		12/14/2023	<input checked="" type="checkbox"/>
	Documents like SSN card, driver's license, State ID	Uploading the client's Green Card.	05/03/2023	<input checked="" type="checkbox"/>
*** Immigration-Related Documents	Documents like I-94, passport with eligible stamps, EAD		05/03/2023	<input checked="" type="checkbox"/>
*** DCF Published Forms	Forms like RCA, RMA, FSSP IEP, ROI, W-2 and Related Programs Registration/"Doc 1"		04/27/2023	<input type="checkbox"/>
*** Paycheck Stubs	Pay Stub		06/28/2022	<input type="checkbox"/>

b. Or to download a number of documents one time by checking the boxes of the documents, and then to click the "Multi File Download" button. The files/documents will be saved in your device.

+ Upload a New Public Document
Multi File Download

6 results found.

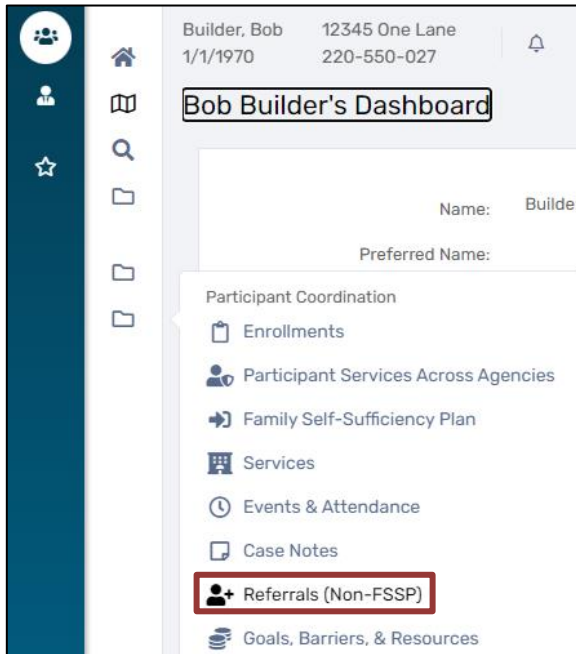
Document Category	Example Documents	Comments	Upload Date	Download File
*** Immigration-Related Documents	Documents like I-94, passport with eligible stamps, EAD		12/14/2023	<input checked="" type="checkbox"/>
*** ID Verification Documents	Documents like SSN card, driver's license, State ID	Uploading the client's Green Card.	05/03/2023	<input checked="" type="checkbox"/>
*** Immigration-Related Documents	Documents like I-94, passport with eligible stamps, EAD		05/03/2023	<input checked="" type="checkbox"/>
*** DCF Published Forms	Forms like RCA, RMA, FSSP IEP, ROI, W-2 and Related Programs Registration/"Doc 1"		04/27/2023	<input type="checkbox"/>
*** Paycheck Stubs	Pay Stub		06/28/2022	<input type="checkbox"/>

# Referrals

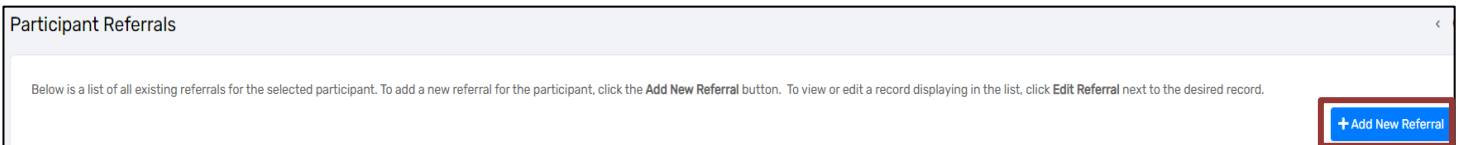
Referrals allows for a user to record referrals that were made to or received from a provider during the participants participation with the program.

## Recording a Referral

1. Navigate to the [Participant](#) workspace, find the Participant Coordination menu group, and select the [Referrals \(Non-FSSP\)](#) Menu Option.



2. Select [Add New Referral](#) in the right-hand corner to proceed.



3. Users are required to select a [Referral Date](#) and [Referral Service](#) to proceed because the following section is dependent on the type of Referral Service.

- Use the search function via the magnifying glass to locate the appropriate **Provider**. This list will be tailored to only providers who offer the **Referral Service** selected above.

Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider: \*

Provider Contact:

Contact Phone Number:

- The Referral Source section will automatically fill in information from the user and the associated provider agency. The user may then adjust the **Status**, leave a **Comment** and if applicable, add an **Associated Need/Barrier**.

Referral Source

Select the agency referral source as the Refer from Provider.

Refer from Provider: \*

Refer from User:

Location:

Status: \*

Comments:

Associated Need/Barrier:

- The final section is available for the user to select if the Participant has authorized that his/her information can be released to the selected provider by selecting one or all of the check boxes.

#### Information Release

If the Client has authorized that his/her information can be released to the selected provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this provider with information regarding the referral.

Email Authorized:

Authorize Information Release:

Resend Email:



- Select **Next** to navigate to the **Referral Outcome** section.

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged:

Appointment Date:   AM

Result Date:

Result:

Comments:

- If the referral has an outcome at that point, the user may record the fields available on the **Referral Outcome** section. If the referral does not yet have an outcome, the user may select **Finish** and return to add the outcome at a later time.
- Once the referral has been entered, it will display on the **Participant Referrals** form, where additional options may be available.

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record.

[+ Add New Referral](#)

1 result found.

Date	From Provider	To Provider	Service	Status	Result
06/15/2022	Community Services Agency, Inc (COMSA)	Community Services Agency, Inc (COMSA)	RSI - After-School Programs	Referral Made	

- [Edit Referral](#)
- [Referral Outcome](#)
- [Delete Referral](#)

- From the [Participant Referrals](#) form, the action button the left of the referral will have three options: [Edit Referral](#), [Referral Outcome](#), and [Delete Referral](#).

## Adding a Referral Outcome

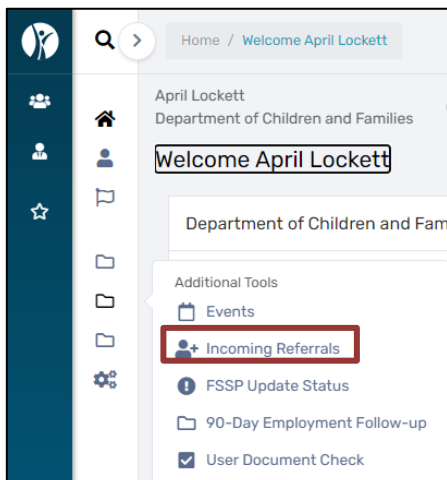
- To add a referral outcome for a referral that does not have an outcome, select the [Referral Outcome](#) option from the action button.
- The user will be directed to the second page of the [Referral](#) form to enter the appropriate information.
- Once the [Referral Outcome](#) is entered, select [Finish](#).
- The updated information will now reflect on the [Participant Referral](#) form.

## Editing a Referral

- To make edits to a referral, select the [Edit Referral](#) option from the action button.
- The user will then be directed to the [Referral](#) form where they may update any of the information to be correct.
- Once the [Referral](#) and/or [Referral Outcome](#) information is updated, select [Finish](#).
- The updated information will now reflect on the [Participant Referral](#) form.

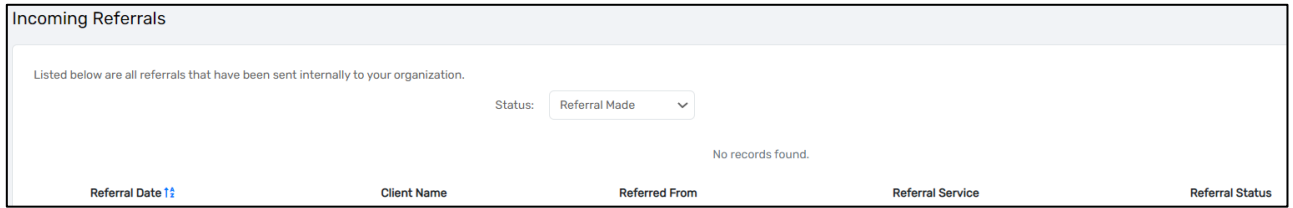
## Incoming Referrals

- Navigate to the [Home](#) workspace, find the Additional Tools menu group, and select the [Incoming Referrals](#) Menu Option.

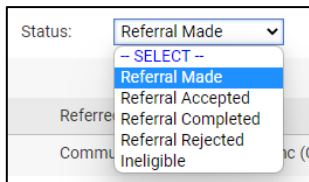




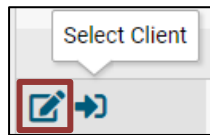
- The [Incoming Referrals](#) form will display all incoming referrals that have been sent to the organization you are logged in as.



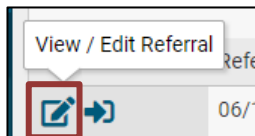
- Users can filter the results based on the current [Status](#) of the referral.



- Once the correct set of referrals is in focus, the user should locate the correct participant and select one of the two action buttons to the left.
  - Selecting the [Select Client](#) button will redirect the user to the [Participant Dashboard](#) in the [Participant Workspace](#).



- Selecting [View / Edit Referral](#) will open the referral details that outline the details of the referral that was made.
  - From the [Referral](#) form, the user may edit the [Referral Status](#), add [Comments](#), and enter the [Referral Outcome](#) information.






- The Referral Source section will automatically fill in information from the user and the associated provider agency. The user may then adjust the [Status](#), leave a [Comment](#) and if applicable, add an [Associated Need/Barrier](#).


[Referral Outcome](#) ⓘ

### Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged:  

Appointment Date:     AM

Result Date:  

Result:

Comments:

6. If the referral has an outcome at that point, the user may record the fields available on the [Referral Outcome](#) section. If the referral does not yet have an outcome, the user may select [Finish](#) and return to add the outcome at a later time.



**Recording Referrals:** *Home Workspace > Additional Tools > Incoming Referrals*

# Help and Issue Ticket Submission

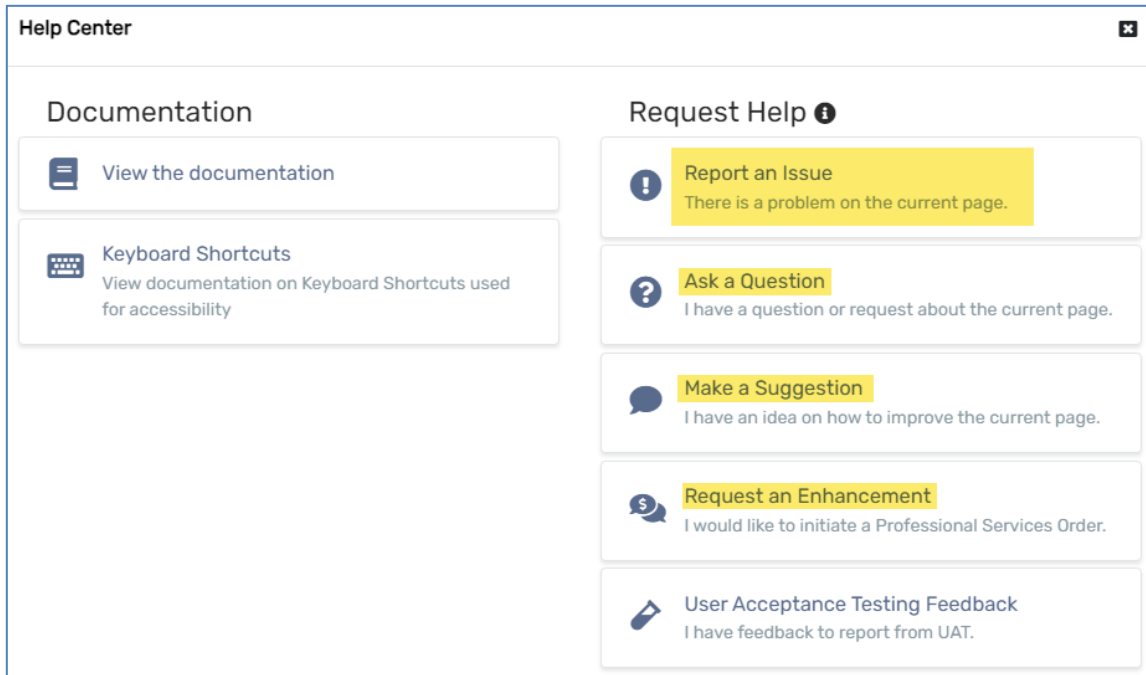
The **Help Center** tool is useful to submit an issue ticket in WRPD/ClientTrack system.

- 1- Make sure you open the record/dashboard of the participant for whom you faced an issue.
- 2- Make sure you open the exact same form/page where you have an issue or question.

For example, the screenshot below shows that I opened and selected the participant “**James Bond**”, and I navigated to the form/page where I had an issue that the “**Program**” field does not give me options to choose from (highlighted in yellow below).

The screenshot displays the ClientTrack interface for an Enrollment Case. The breadcrumb trail at the top reads: Participants / James Bond's Dashboard / Bond, James / Enrollment Case. The participant information shows Bond, James, 789 60th St, 1/1/1978. The form fields include: Name: Bond, James; Program: \* Option not in the list (highlighted in yellow); Eligibility Status: \* -- SELECT -- Option not in the list; Head of the Enrollment: \* Bond, James; Enrollment Date: \* 05/30/2024; Program Case Manager: \* Anwar Sallumi. A red arrow points to a question mark icon in the bottom left corner of the interface.

- 3- Click on the question mark icon on the left lower corner of the screen (where the red arrow is pointing to in the screenshot above).
- 4- You get the Help Center window where you mainly can **Report and Issue/Problem** on the current page. You can also **Ask a Question**, **Make a Suggestion**, or **Request an Enhancement**.



- 5- Click on **Report an Issue** tile to submit an issue ticket. Complete the Summary, Description, Email, and Phone fields. You may attach a file or a screenshot as needed.

The screenshot shows the 'Report an Issue' form. It includes a text area for a summary, a rich text editor for the description, and fields for email and phone number. A red arrow points to the text 'Click here to attach a file or drag-and-drop'.

Report an Issue

Enter a summary of your issue \*

The summary helps to quickly identify your issue when you're referring back to it later.

Please describe the issue

Please enter any details that might help describe the issue or might help in solving it.

[Click here to attach a file or drag-and-drop](#) [View Debug Information](#)

How can we reach you?

Email Address \*

Phone Number \*

[Notify additional people](#)

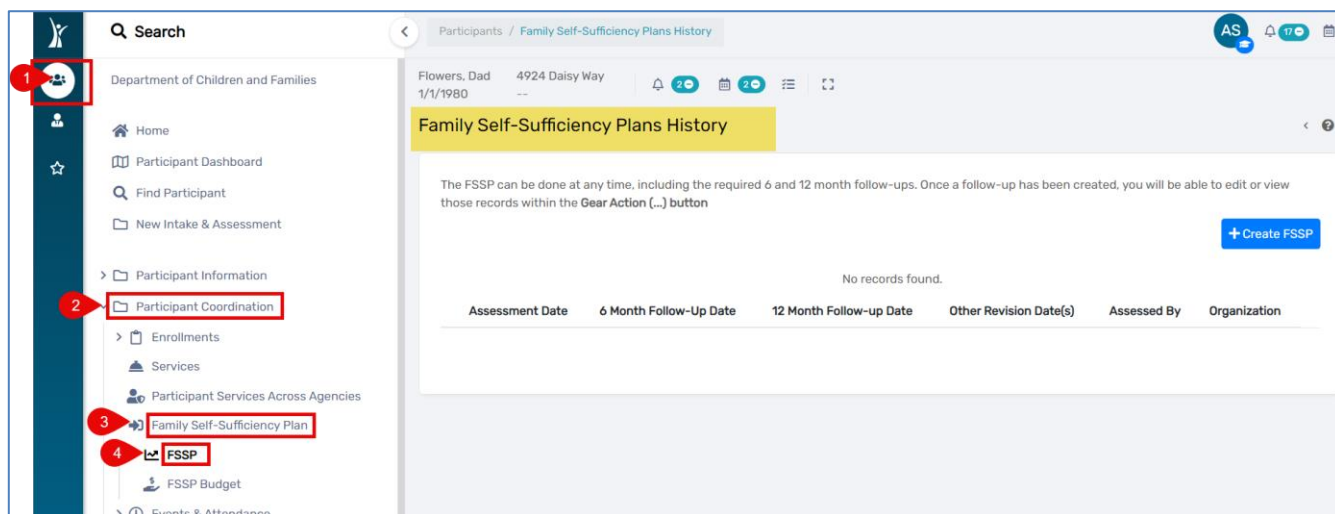
# The Family Self-Sufficiency Plan (FSSP)

Please note: Screenshots within this guide does not show actual participants' data, and no PII is displayed herein.

The purpose of this section is to inform users on the overall process of managing and how to navigate the Family Self-Sufficiency Plan (FSSP) in WRPD/ClientTrack system.

## Navigation

FSSPs are accessed/managed from **Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP**. The **Family Self-Sufficiency Plans History** screen/form opens. Almost all tasks related to FSSPs will be conducted from this screen/form.



## Creating a New FSSP

One Family Self-Sufficiency Plan (FSSP) needs to be created for each one family/case. This one FSSP will include all family/case members. Duplicated open/active FSSPs for the same participant or family is not allowable. To create a new FSSP:

- Navigate to the dashboard of the Head of the Household/Principal Applicant (PA) of the case/family.
- Make sure that this participant has at least one enrollment in any program (NOT necessary to be enrolled in the RSS program).
- Navigate to the **Family Self-Sufficiency Plans History** screen/form (from **Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP**).
- Click the **Create FSSP** button. This will launch the FSSP workflow.
- Add the **FSSP Assessment Date** (make sure to put the actual date of the new FSSP).
- The fields **6-Month Follow-up Date**, **12-Month Follow-up Date** and **Assessment Type** will be populated automatically according to the 'FSSP Assessment Date' field.
- For the **Associated Enrollment** field, select a program enrollment from the drop-down list. If there are no program enrollments listed, that means the participant does not have any enrollments in any programs. In this case, you need to **Pause** the FSSP workflow, navigate to the **Program Enrollment**, and add an appropriated program enrollment to this participant. Then you can resume/return to the FSSP workflow and add the newly added program enrollment from the **Associated Enrollment** drop-down list. (Learn more about how to Pause and Resume the FSSP workflow in the section after **Family Members**).
- Scroll down to the **Family Members** section in the same screen/from.


**Family Self-Sufficiency Plan**

Enter information for the FSSP here. The Associated Enrollment in this section relates to the FSSP in whole, while each family member can have their own separate associated enrollment selected at the bottom of this page.

For the FSSP's Associated Enrollment, select the current RSS Employment and Employability enrollment for the member of the family enrolled in that program, if one exists.


If no RSS Employment and Employability enrollment exists, select any current enrollment.


If no current enrollment exists for any family member, please exit this FSSP workflow and create a current enrollment.


FSSP Assessment Date: \* 10/01/2024 

6-Month Follow-up Date: 04/01/2025

12-Month Follow-up Date: 10/01/2025


Assessment Type: \* Initial 

**Associated Enrollment: \* 09/29/2023 - RSS - Employment & Employability - Flowers, Dad **

Assessed By: Anwar Sallumi 

Organization: Department of Children and Families

Comments:



## Family Members

All family members associated with the selected participant will display in this section. If any family members are missing, [Pause](#) the FSSP workflow and navigate to **Participant Information > Family Members**, and add family members as needed. This may require completing new [Intakes](#) for the family members if they are not already recorded in WRPD/ClientTrack. After adding the missing family member(s), resume the FSSP workflow.

To complete the Family Members section in the FSSP workflow:

- Identify which family members to include in this FSSP. The default value will display 'Yes' under '[Included in FSSP?](#)' for all current family members. In most cases, all members of the family will be included in the FSSP\*.
- Select a program enrollment for each family members from the [Associated Enrollment](#) drop-down list. It is not required for all family members other than the PA to have their own program enrollments. If a family member does not have their own program enrollments, select the same enrollment that was already selected above next to "[Associated Enrollment](#)" for the Head of the Household/PA.

### Choosing **NOT** to Include a Family Member(s) in the FSSP:

By changing the value in the '[Included in FSSP?](#)' field to 'No', you will need to select one of the following options from the corresponding '[Additional Info](#)' field. Select the option that most appropriately reflects the circumstances.

Reasons for Excluding a Family Member in the FSSP include:

1. Declines All Services – Case Note Required
2. Not Able to be Contacted – Case Note Required
3. FSSP Already Recorded Separately\*

Family Members

Identify which family members to include in this FSSP. Select each family member's enrollment associated with this FSSP. If a family member has no enrollments of their own, select the same enrollment as selected above, next to "Associated Enrollment". If you do not see any of the family members, you should pause and add the missing family member to the case.

Participant Name	Included In FSSP?	Additional Info	Age	Case Manager*	Associated Enrollment
Flowers, Dad	Yes		44	Anwar Sallumi	09/29/2023 - RSS - Employment & Employability - Flowers, Dad
Flowers, Mom	Yes		42	Anwar Sallumi	09/29/2023 - RSS - Employment & Employability - Flowers, Dad
Flowers, Suzy	No	-- SELECT --	14	Anwar Sallumi	-- SELECT --

Options for -- SELECT --:

- Declines All Services - Case Note Required
- Not Able to be Contacted - Case Note Required
- FSSP Already Recorded Separately

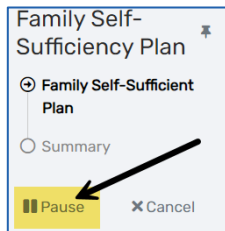
\* It is expected that all members of the same family are included in the same FSSP, and it is very rare that a user should select "FSSP Already Recorded Separately". Please contact BRP for instruction on when and why it may be allowable for a person to be on a separate FSSP from the rest of their family.

- Once all fields have been completed, click 'Next' to proceed to next step of this FSSP workflow "Participant Goals Associated with this FSSP".

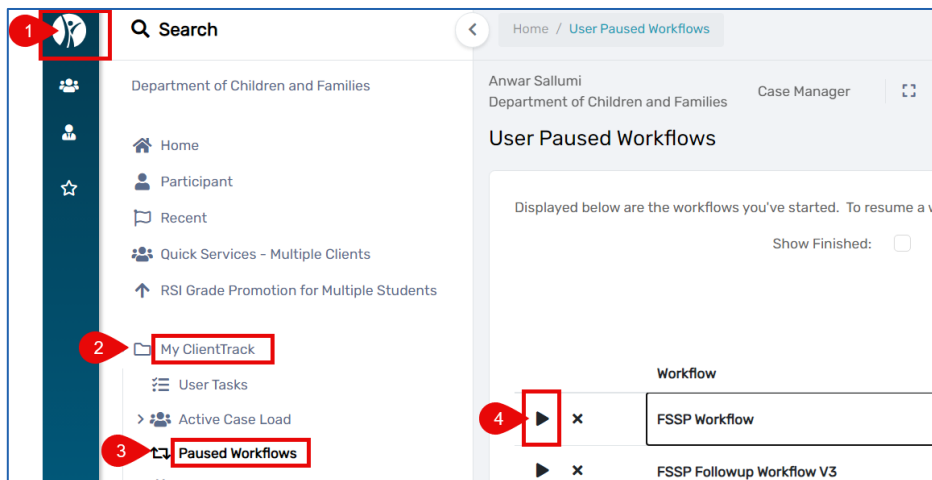
## How to Pause and Resume Workflows

Working on workflows, like the FSSP one, may have several steps and may take time to complete and save. In some situations, you may need to stop and do something else, but of course you do not want to lose your work and the info/data that you have already entered in the workflow. In this case you can use the **Pause** tool to save your work and resume any time or day later.

To pause the FSSP workflow, click on **Pause** on the left side. This will close the workflow.



To resume your work from where you left in the workflow, navigate to **Home > My ClientTrack > Paused Workflows** and click the workflow that you want to resume.



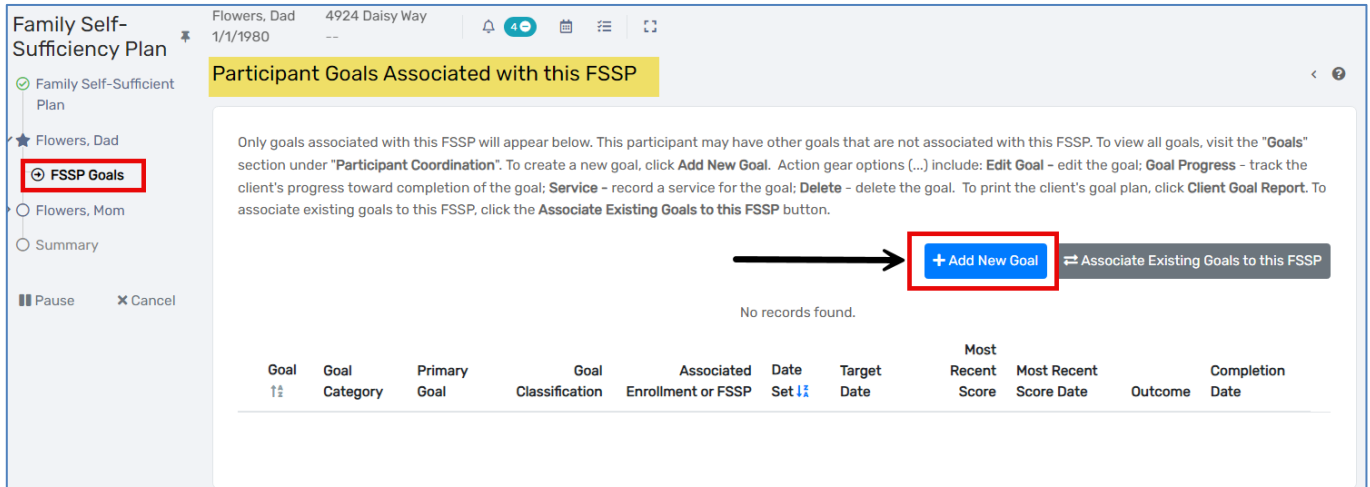
## Participant Goals Associated with this FSSP

After clicking 'Next' in the previous step, the **FSSP Goals** step/screen will open for the first family member. By default, only goals associated with this FSSP will appear on this step/screen for each family member.

### Adding a New FSSP Goal

To add a new goal to the list of goals associated with this FSSP:

- Click the 'Add New Goal' button in the upper right corner of the screen.



- This opens a data entry form wherein the information related to the specific goal will be entered.
- Add the **Goal Start Date** and the **Target Date** for completion of the goal.

### Goal

Identify the information on the Participant's individual goal.

Participant Name: Flowers, Dad

Goal Start Date: \* 10/22/2024

Target Date: \* 03/31/2025

- From the 'Individual or Family Goal Classification' drop-down list, select either 'Family Goal' or 'Individual Goal'.

*Goals can be created one person at a time, or for multiple members at the same time. Family goals can later be updated through any family member with that goal, and all of the other family members with same goal will receive the same update(s). If you want to record family members' goal updates separately (at different times, etc.) then you need to create separate Individual Goals for each family member.*

Individual or Family Goal Classification: \*

Goal Comments:

- Family Goal
- Individual Goal



- If 'Family Goal' is selected, the new field 'Family Members for this Goal' will be added automatically to the form, and you can select which member(s) of the family the goal applies to. Family Goals can later be updated through any family member with that goal.

Individual or Family Goal Classification: \* Family Goal ▼ ⓘ

Family Members for this Goal: ✓ Flowers, Dad ✓ Flowers, Mom Flowers, Suzy ✓

- Select an option from the 'Goal Category' drop-down list.
- From the 'Goal' drop-down list, select one of the options that are related to the 'Goal Category' that you select earlier.

Goal Category: \* Transportation ▼

Goal: \* -- SELECT -- ▼

- SELECT --
- Get Driver's Permit/License
- Organize Carpool
- Organize Transportation to Work/School
- Other
- Use Public Transportation

- In the 'Strengths' box, describe any current strengths the participant owns that would help them complete their goal. Strengths might include experiences, knowledge, skills, social connections, or access to resources that support the participant to achieve this goal.
- In the 'Barriers' box, describe any barriers that, if unaddressed, would keep the client from completing this goal.
- Keep the default option 'Open' for the 'Status' field. Keeping the status 'Open' means the participant is still working on an outcome. Changing the Status to 'Closed' means that the participant has finished or is no longer working towards this goal.

Status: \* -- SELECT -- ▼ ⓘ

- SELECT --
- Open
- Closed

## Goal Scoring

- Add the 'Score Date' and select appropriate value to assign to the 'Goal Score':

0 - **In Crisis**: Few or no resources available. Needs assistance as soon as possible.

1 - **At Risk**: Few to some resources. Needs to be linked to additional resources.

2 - **Moderately Stable**: Some resources. Able to function moderately independently but needs supplementary resources.

3 - **Thriving**: Self-sufficient and able to function independently OR not applicable.

**Goal Scoring**

Please record updated scoring information.

**In Crisis:** Few or no resources available. Needs assistance as soon as possible.  
**At Risk:** Few to some resources. Needs to be linked to additional resources.  
**Moderately Stable:** Some resources. Able to function moderately independently but needs supplementary resources.  
**Thriving:** Self-sufficient and able to function independently OR not applicable.

No records found (+2).

	Score Date		Goal Score* <span style="font-size: 0.8em;">?</span>
<input checked="" type="checkbox"/>	10/22/2024 <span style="font-size: 0.8em;">📅</span>	<input type="checkbox"/>	<input type="radio"/> 0 - In Crisis <input type="radio"/> 1 - At Risk <input checked="" type="radio"/> 2 - Moderately Stable <input type="radio"/> 3 - Thriving

## Action Steps

- Add the 'Action Steps' that need to be completed to attain the goal detailed above. At least one Action Step must be completed per Goal.

**Action Steps**

Please record the steps that need to be completed to attain the goal detailed above. At least one Action Step must be completed per Goal.

No records found (+2).

	Action Step Title*	Start Date*	Expected Action Step End Date* <span style="font-size: 0.8em;">!</span>	Assigned To*	Status*
<input checked="" type="checkbox"/>	Pass the permit exam	10/22/2024 <span style="font-size: 0.8em;">📅</span>	01/31/2025 <span style="font-size: 0.8em;">📅</span>	Flowers, Dad <span style="font-size: 0.8em;">▼</span>	New/Pending <span style="font-size: 0.8em;">▼</span>
<input checked="" type="checkbox"/>	Pass the road exam	02/03/2025 <span style="font-size: 0.8em;">📅</span>	03/31/2025 <span style="font-size: 0.8em;">📅</span>	Flowers, Dad <span style="font-size: 0.8em;">▼</span>	New/Pending <span style="font-size: 0.8em;">▼</span>
<input type="checkbox"/>	<input type="text"/>	MM/DD/YYYY <span style="font-size: 0.8em;">📅</span>	MM/DD/YYYY <span style="font-size: 0.8em;">📅</span>	-- SELECT -- <span style="font-size: 0.8em;">▼</span>	-- SELECT -- <span style="font-size: 0.8em;">▼</span>

- Click the 'Save' button at the bottom right of the screen to save the goal and return to the 'FSSP Goals' step/screen. The goal you just created will be listed.

Family Self-Sufficiency Plan | Flowers, Dad | 4924 Daisy Way | 1/1/1980

### Participant Goals Associated with this FSSP

Only goals associated with this FSSP will appear below. This participant may have other goals that are not associated with this FSSP. To view all goals, visit the "Goals" section under "Participant Coordination". To create a new goal, click **Add New Goal**. Action gear options (...) include: **Edit Goal** - edit the goal; **Goal Progress** - track the client's progress toward completion of the goal; **Service** - record a service for the goal; **Delete** - delete the goal. To print the client's goal plan, click **Client Goal Report**. To associate existing goals to this FSSP, click the **Associate Existing Goals to this FSSP** button.

**+ Add New Goal**   **Associate Existing Goals to this FSSP**

1 result found.

Goal ↑	Goal Category	Primary Goal	Goal Classification	Associated Enrollment or FSSP	Date Set	Target Date	Most Recent Score	Most Recent Score Date	Outcome	Completion Date
*** Get Driver's Permit/License	Transportation	No	Family Goal	10/22/2025 - Family Self-Sufficiency Plan	10/22/2024	03/31/2025	2 - Moderately Stable	10/22/2024		

**Continue**

- Click the 'Continue' button at the bottom right of the screen to move to other family members where you can add new goals if needed, until you reach the 'Summary' last step/screen.

## Associate Existing Goals to the FSSP

A participant may have other existing goals that were created and added in the system in the past for purposes other than the FSSP. Below where to add non-FSSP goals.

Home | Participant Dashboard | Find Participant | New Intake & Assessment

Participant Information | **Participant Coordination** | Enrollments | Services | Participant Services Across Agencies

Family Self-Sufficiency Plan | Events & Attendance | RHP/ARHP/URHP Plan of Care | RSI Grade Promotion | Case Notes | **Goals, Barriers, & Resources** | Goals | Barriers | Resources | Employment

Flowers, Dad | 4924 Daisy Way | 1/1/1980

### Participant Goals

All of the participant's goals display below, including those associated with an FSSP. To create a new goal, click **Add New Goal**. Action gear options (...) include: **Edit Goal** - edit the goal; **Goal Progress** - track the client's progress toward completion of the goal; **Service** - record a service for the goal; **Delete** - delete the goal. To print the client's goal plan, click **Client Goal Report**.

**+ Add New Goal**

1 result found.

Goal ↑	Goal Category	Primary Goal	Goal Classification	Associated Enrollment or FSSP	Date Set	Target Date	Most Recent Score	Most Recent Score Date	Outcome	Completion Date
*** Find an Educational Program	Education	No	Individual Goal	10/22/2025 - Family Self-Sufficiency Plan	08/05/2024	09/30/2025	2 - Moderately Stable	08/05/2024		

- Click the 'Associate Existing Goals to this FSSP' button to associate existing goals to this FSSP instead of adding a completely new goal(s).

### Participant Goals Associated with this FSSP

Opens a list of all goals that have been associated with the selected participant.

Only goals associated with this FSSP will appear below. This participant may have other goals that are not associated with this FSSP. To view all goals, visit the "Goals" section under "Participant Coordination". To create a new goal, click **Add New Goal**. Action gear options (...) include: **Edit Goal** - edit the goal; **Goal Progress** - track the client's progress toward completion of the goal; **Service** - record a service for the goal; **Delete** - delete the goal. To print the client's goal plan, click **Client Goal Report**. To associate existing goals to this FSSP, click the **Associate Existing Goals to this FSSP** button.

+ Add New Goal   Associate Existing Goals to this FSSP

1 result found.

Goal ↑	Goal Category	Primary Goal	Goal Classification	Associated Enrollment or FSSP	Date Set ↓	Target Date	Most Recent Score	Most Recent Score Date	Outcome	Completion Date
--------	---------------	--------------	---------------------	-------------------------------	------------	-------------	-------------------	------------------------	---------	-----------------

All goals for the participant will appear here except for any goals already associated with another FSSP. Goals that are already associated to *this* FSSP will already be selected and cannot be deselected.

### Associate Goals to this FSSP

All goals for the client will appear below. Chose which goals you want to associate with this FSSP and press **Save & Close**. Goals that are already associated to this FSSP will already be selected, can't be deselected, and appears with a \*.

Goals that are already associated with another FSSP will not appear here.

2 results found.

Goals that are already associated to this FSSP will already be selected, cannot be deselected, and appear with an astrisk \*

<input type="checkbox"/>	Goal ↑	Goal Category	Primary Goal	Goal Classification	Associated Enrollment or FSSP	Date Set ↓	Target Date	Most Recent Score	Most Recent Score Date	Outcome	Completion Date
<input checked="" type="checkbox"/>	Get Driver's Permit/License	Transportation	No	Family Goal	10/22/2024 - 10/22/2025 - Family Self-Sufficiency Plan	10/22/2024	03/31/2025	2 - Moderately Stable	10/22/2024		
<input type="checkbox"/>	Find an Educational Program	Education	No	Individual Goal	10/22/2024 - 10/22/2025 - Family Self-Sufficiency	08/05/2024	09/30/2025	2 - Moderately Stable	08/05/2024		

Check the box next to the goal you wish to associate with this FSSP.

Save & Close   Cancel

- Check the box next to the goal you wish to associate with this FSSP and click 'Save & Close' button to return to the FSSP Goals screen where it shows both goals are listed.

Family Self-Sufficiency Plan | Flowers, Dad | 4924 Daisy Way | 1/1/1980

### Participant Goals Associated with this FSSP

Only goals associated with this FSSP will appear below. This participant may have other goals that are not associated with this FSSP. To view all goals, visit the "Goals" section under "Participant Coordination". To create a new goal, click **Add New Goal**. Action gear options (...) include: **Edit Goal** - edit the goal; **Goal Progress** - track the client's progress toward completion of the goal; **Service** - record a service for the goal; **Delete** - delete the goal. To print the client's goal plan, click **Client Goal Report**. To associate existing goals to this FSSP, click the **Associate Existing Goals to this FSSP** button.

**+ Add New Goal** **⇌ Associate Existing Goals to this FSSP**

2 results found.

Goal	Goal Category	Primary Goal	Goal Classification	Associated Enrollment or FSSP	Date Set	Target Date	Most Recent Score	Most Recent Score Date	Completion Date
Get Driver's Permit/License	Transportation	No	Family Goal		10/22/2024	03/31/2025	2 - Moderately Stable	10/22/2024	
Find an Educational Program	Education	No	Individual Goal		08/05/2024	09/30/2025	2 - Moderately Stable	08/05/2024	

- Click the 'Continue' button to proceed to the next step that shows the other family member's goal(s) screen. Add new goals or associate existing goals as needed for each other family member(s).
- Click the **action (...)** button next to the specified goal to view, edit, or update an FSSP goal. Users may also delete a goal from this same action button.

- Once all goals for all family member(s) have been added for the FSSP, click the 'Continue' button to proceed to the 'Summary' step/screen.

## FSSP Summary

The last step/screen in the FSSP workflow is the **Summary** screen. If this process was for creating the FSSP (i.e. not for editing the FSSP record), the user will set the **Initial Primary Goal** and **Program Referral for Initial Primary Goal** in this 'Summary' step/screen. These two fields will no longer be editable once the record is saved. It is important to know that:

1. The **Initial Primary Goal** is the most important goal that each participant would like to complete, as self-reported at the time that the FSSP is first written. Initial Primary Goals are reported to ORR and **must be followed-up on 6 and 12 months after the first FSSP assessment date**. In order to comply with these federal reporting requirements, **an Initial Primary Goal cannot be edited once it is saved**, except by written request to the Bureau of Refugee Programs (BRP). Participants can have unlimited number of additional FSSP goals, and additional goals can be recorded in the FSSP at any time. Individuals who are enrolled in the RSS E&E program are required to have "**Employment**" as a Primary Goal.

- The **Program Referral for the Initial Primary Goal** is the program that the individual will be referred to in order to help them achieve their Initial Primary Goal. This can be a BRP-funded program that your agency delivers to the participant, a non-BRP-funded program that your agency delivers, or an outside program that you refer the participant to enroll in with another agency.

To complete the 'Summary' step:

- Select a goal for each family member from the 'Identify Initial Primary Goal' drop-down list.

Name	Birthdate	Identify Initial Primary Goal* <span>?</span>
Flowers, Mom	01/01/1982	-- SELECT --
Flowers, Dad	01/01/1980	<div style="border: 2px solid red; padding: 5px;">           -- SELECT --            -- SELECT --            Education - Find an Educational Program            Transportation - Get Driver's Permit/License         </div>

- Select a program for each family member from the 'Program Referral for Initial Primary Goal' drop-down list.
- Complete the 'Describe how the Referral for the Selected Program will be completed' field for each family member.
- Answer and select an option for the question 'FSSP Interpretation Provided?' if needed.

Family Self-Sufficiency Plan | Flowers, Dad | 4924 Daisy Way | 1/1/1980

**Summary**

In order to comply with these federal reporting requirements, **both the "Initial Primary Goal" and Program Referral for Initial Primary Goal" cannot be edited once it is saved** except by written request to the Bureau of Refugee Programs (BRP). However, participants can have unlimited number of additional goals, and additional goals can be recorded in the FSSP at any time.

If the FSSP is not editable and you believe it should be edited, please contact the organization listed on the first page of the FSSP.

**IMPORTANT**  
You cannot edit the information once you click "Save & Print", "Save", or "Save & Close" button below.

2 results found.

Name	Birthdate	Identify Initial Primary Goal* <span>?</span>	Program Referral for Initial Primary Goal* <span>?</span>
Flowers, Mom	01/01/1982	Transportation - Get Driver's Permit/License	RSS_Other Services (ORR-funded)
Flowers, Dad	01/01/1980	Transportation - Get Driver's Permit/License	RSS_Other Services (ORR-funded)

Save & Print
Save
Save & Close

- Click 'Save & Print' button to save and print the whole FSSP or click 'Save & Close' to save and finish the FSSP workflow.

## The FSSP Action Button

Once an FSSP has been created, users can perform different tasks by using the [options](#) listed under the [action \(...\)](#) button:

**Family Self-Sufficiency Plans History**

The FSSP can be done at any time, including the required 6 and 12 month follow-ups. Once a follow-up has been created, those records within the **Gear Action (...)** button

3 results found.

Assessment Date	6 Month Follow-Up Date	12 Month Follow-up Date	Other Revision Date(s)	Assessed By
02/21/2024	08/21/2024	02/21/2025		Ashley Smith
		12/20/2022		Debi Fluckiger
		Actual Date: 3/5/2024		Debi

A red arrow points to the gear icon (three dots) next to the first row. A dropdown menu is open, listing five actions:

1. Edit/View Initial FSSP
2. Create/Edit/View FSSP Follow-up
3. View Decommissioned Initial FSSP Scores
4. Print FSSP
5. Delete FSSP

### 1- Edit/View Initial FSSP

Edit the initial FSSP including:

- a. [Add/Edit FSSP Goals](#) (with the exception of the Initial Primary Goal, which cannot be altered after the initial record creation)
  - Track progress towards the [FSSP Goals](#)
  - [Print FSSP Goals](#)
- b. [Add/Remove Family Members to the FSSP](#)

### 2- Create/Edit/View FSSP Follow-Up

If selected, the user will be redirected to the [FSSP Follow-Up screen](#) where they will be able to complete the appropriate follow-up based on existing records. Select the appropriate follow up type from the '[FSSP Follow-Up or Revision Type](#)' field then proceed to complete the assessment.

FSSP Follow-Up or Revision Type: \* -- SELECT --

FSSP Follow-up or Revision Date: \* -- SELECT --

6-Month Follow-up Date: 6 Month Follow-up  
12 Month Follow-up  
Other Revision 1

### 3- View Decommissioned Initial FSSP Scores

Option will display in the action button menu if participant has FSSPs that were created/completed prior to 10/22/2024

### 4- Print FSSP

Allows user to print FSSP for sharing with the participant.

### 5- Delete FSSP

Delete the FSSP (user permission required).

## Check for Existing FSSPs

It is important to note that each Participant should only have ONE active open FSSP within 12 months of the FSSP Assessment Date (the date when the FSSP was created).

To check whether a participant has an FSSP, with the participant selected, navigate to the ['Family Self-Sufficiency Plans History'](#) screen/form from **Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP**. This will bring up all FSSPs that have been created for the selected participant.

If a participant has an existing FSSP\*, it will display here. Click the [action button \(...\)](#) to view or edit an existing FSSP or create a follow-up. If a participant has an active FSSP, you will not be able to create an FSSP because participants can only have one active FSSP at any given time.

Assessment Date	6 Month Follow-Up Date	12 Month Follow-up Date	Other Revision Date(s)	Assessed By	Organization
01/17/2024	07/17/2024	07/15/2025		Sierra Hartman	Department of Children and Families

*\* For FSSPs with 'Assessment Date' prior to 10/22/2024, the action button menu will populate with the **OLD VERSIONS** of the Initial FSSP, 6-Month and 12-Month Follow-Ups. Proceed to select the appropriate option and complete the forms accordingly.*



	Assessment Date	6 Month Follow-Up Date	12 Month Follow-up Date
...	02/21/2024	08/21/2024	02/21/2025
...	12/20/2021	06/20/2022 Actual Date: 1/5/2022	12/20/2022 Actual Date: 3/5/2024
...	11/15/2021	05/15/2022	11/15/2022

- Edit/View Initial Plan (OLD VERSION)
- Edit/View 6-Month Follow-Up (OLD VERSION)
- Edit/View 12-Month Follow-Up (OLD VERSION)
- View Decommissioned Initial FSSP Scores
- Print FSSP
- Delete FSSP

## FSSP Follow-Ups: 6-Month, 12-Month and Other Revisions

Once an initial FSSP has been created, it will display for the selected participant under the 'Family Self-Sufficiency Plans History' form/screen which can be opened from **Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP**. The system auto assigns 6-month and 12-month follow up dates based on the date of the initial FSSP assessment. Those dates will display in the respective follow up date columns on the **FSSP History** screen.

- Home
- Participant Dashboard
- Find Participant
- New Intake & Assessment
- Participant Information
- Participant Coordination
- Enrollments
- Services
- Participant Services Across Agencies
- Family Self-Sufficiency Plan
- FSSP
- FSSP Budget
- Events & Attendance

### Family Self-Sufficiency Plans History

The FSSP can be done at any time, including the required 6 and 12 month follow-ups. Once a follow-up has been created, you will be able to edit or view those records within the Gear Action (...) button

1 result found.

	Assessment Date	6 Month Follow-Up Date	12 Month Follow-up Date	Other Revision Date(s)	Assessed By	Organization
...	10/22/2024	04/22/2025	10/22/2025		Anwar Sallumi	Department of Children and Families

## Create/Edit/View FSSP Follow-Up

To create/edit/view an FSSP follow-up, from the FSSP History screen, click on the **action (...)** button next to the associated FSSP. \*

Assessment Date	6 Month Follow-Up Date	12 Month Follow-up Date	Other Revision Date(s)
10/22/2024	04/22/2025	10/22/2025	

*\*Participants who have existing FSSPs completed prior to the FSSP redesign (i.e. 'Assessment Date is before 10/22/2024) will continue to use the OLD VERSION of FSSPs and the action button menu will look like the menu below.*

Assessment Date	6 Month Follow-Up Date	12 Month Follow-up Date	Other Revision Date(s)
07/15/2024	01/15/2025	07/15/2025	

## FSSP Follow-Up Screen

Based on the timing of the follow-up you wish to create, select the appropriate FSSP Follow-Up or Revision Type.

If there's a previously recorded FSSP Follow-up/Revision (e.g. 6 Month Follow-up, 12-Month Follow-up), then selecting it again will load data from previous Follow-up/Revision.

Other than the 6 Month & 12 Month Follow-ups, you can also add up to 10 Other Revisions to the FSSP. These are used if you need to make any other updates besides the 6 Month & 12 Month Follow-ups.

**FSSP Follow-Up**

Any FSSP Follow-ups already recorded will appear below. If your organization wrote the initial FSSP you will only be able to enter information for new follow-ups below. If your organization did not write the initial FSSP you will only be able to view the information for previously recorded follow-ups.

FSSP Follow-Up or Revision Type: -- SELECT -- ⓘ

FSSP Follow-up or Revision Date: \* -- SELECT --

6-Month Follow-up Date: 6 Month Follow-up

12-Month Follow-up Date: 12 Month Follow-up

Other Revision 1

Assessed By: Anwar Sallumi 🔍

Organization: Department of Children and Families

## 6 Month Follow-Up

- Select '6 Month Follow-up' option from the 'FSSP Follow-up Revision Type'. Once the Revision Type has been selected, complete applicable fields related to the selected follow up.
- Pay attention to some fields that may need to be changed/updated as needed, and also to complete all required fields.
- Hover over the information icon ⓘ next to certain questions to understand what that information means, and to get more helpful information.

**FSSP Follow-Up**

Any FSSP Follow-ups already recorded will appear below. If your organization wrote the initial FSSP, you may also enter new information for new follow-ups below. If you did not write the initial FSSP you will only be able to view the information for previously recorded follow-ups.

FSSP Follow-Up or Revision Type: \* 6 Month Follow-up ⓘ

FSSP Follow-up or Revision Date: \* 10/23/2024 📅

6-Month Follow-up Date: 04/22/2025

12-Month Follow-up Date: 10/22/2025

Assessed By: Anwar Sallumi 🔍

Organization: Department of Children and Families

Associated Enrollment: \* 09/29/2023 - RSS - Employment & Employability - Flowers, Dad ▾

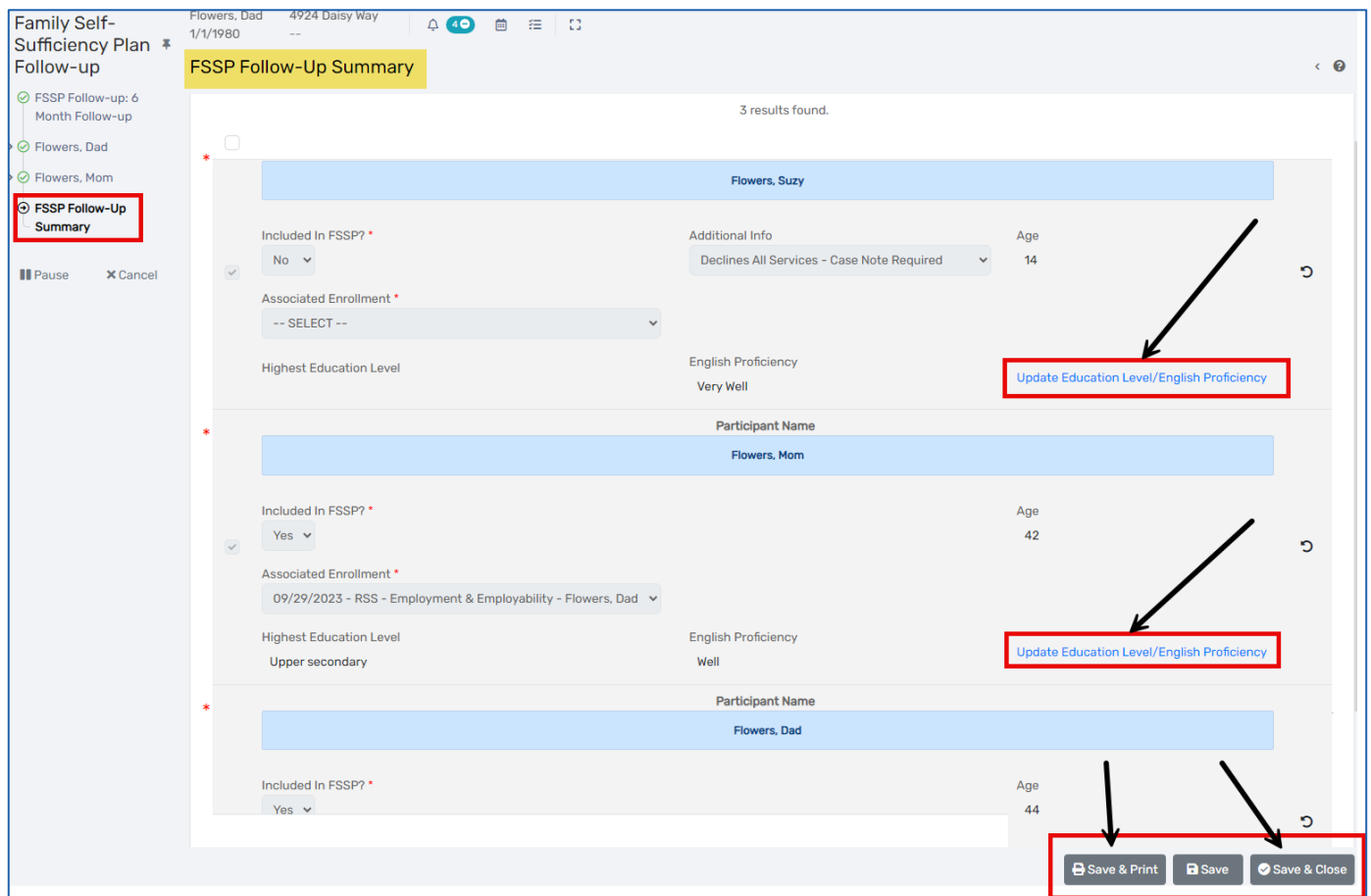
I have reviewed this individual/family's FSSP and attest that the individual is is ▾ engaged and working toward meeting their previously established goal(s) family:

Please describe any new referrals made to support the family's goal(s):

Comments:

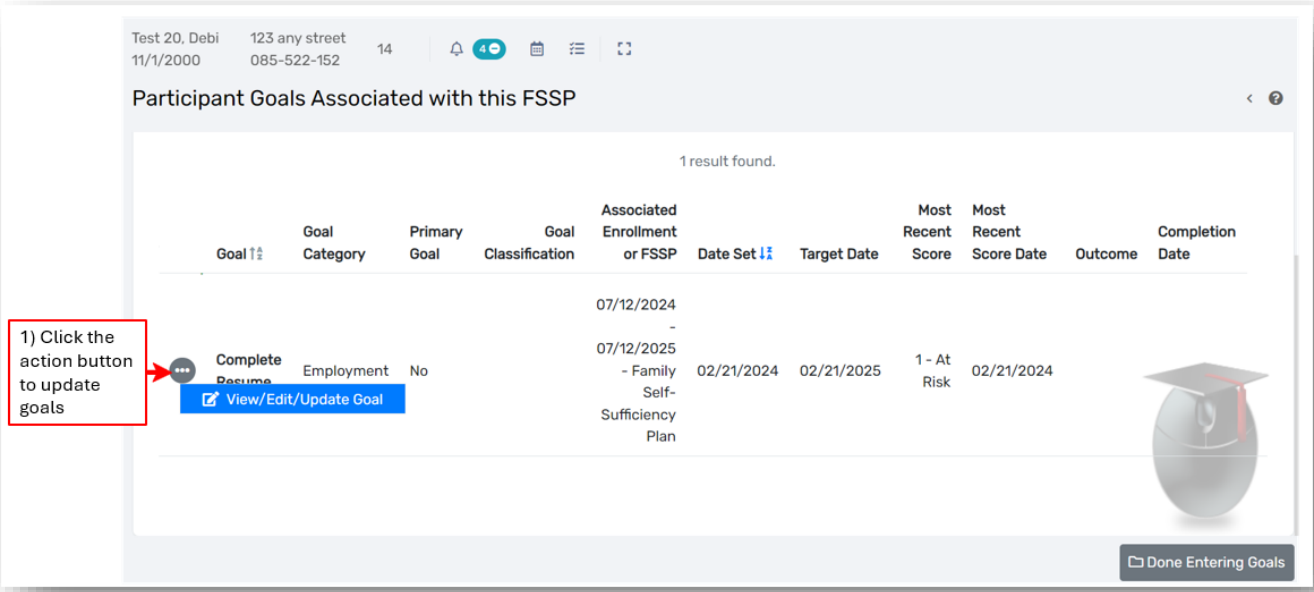
- Scroll down to the 'Family Members' section.
- Review all the prefilled information for each family member and verify that it is correct. Select each family member's enrollment associated with this FSSP. If a family member has no enrollments of their own, select the same enrollment as selected above, next to "Associated Enrollment".

- Click the 'Next' button to move to the next step which shows a family member's goals.
- Click the [action button](#) next to a goal to view, edit, or update it. A new goal can be added if needed. **IMPORTANT:** Check the **Updating FSSP Goals** section under the screenshot below to know about how to complete important steps of updating FSSP goals before moving to the following steps.
- Click the 'Done Entering Goals' button after completing the FSSP goals of the first family member to move to the other family members' goals. View, edit, update, or add goals if needed.
- Click the 'Done Entering Goals' button again to move to the 'FSSP Follow-up Summary' step/screen which is the final step in this '6 Month Follow-up' workflow.
- Review the info in the Summary fields about each family member.
- Use the available links to update information such as [Education Level and English Proficiency](#).
- Once all information related to Family Members has been verified and updated as needed, click the 'Save & Print' to save and print the Follow-up information, or click the 'Save & Close' button.

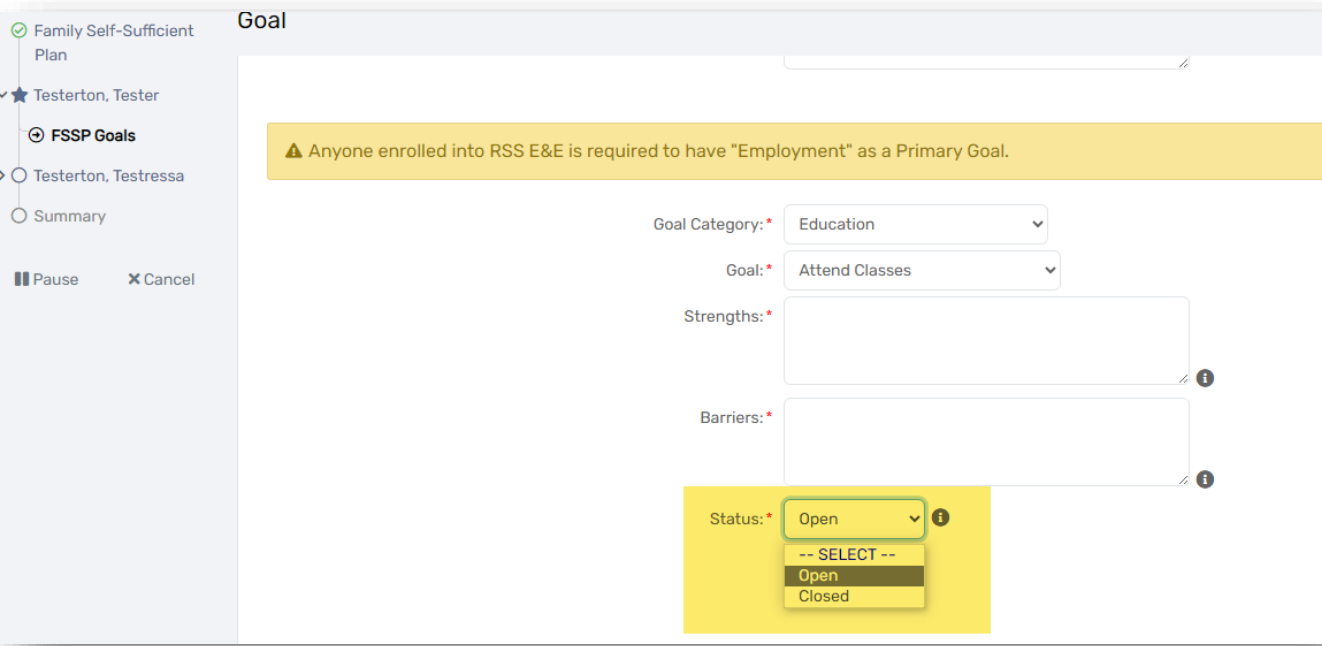


### Updating FSSP Goals

It is important to review and update the Goals associated with the current FSSP for the selected family member. Click the [action button](#) to View/Edit/Update any of the goals. It is important to track the participant's progress toward completion of the goal.



After clicking the 'View/Edit/Update Goal' from the **action button** on the FSSP goals screen, make any applicable updates including whether the goal's status is still **"Open"** or **"Closed"**:



- If the option 'Closed' is selected, new fields will be automatically added to the form.
- Add comments as needed about the closure or completion of the goal.
  - Add the goal's 'Completion Date'.
  - Select one of the options from the 'Outcome' drop-down list.

- If the option 'Goal Ended Incomplete' is selected for the 'Outcome' field, more new fields will be automatically added and should be completed.

- Update the 'Score Date' and the 'Goal Score' to reflect the current status of the 'Goal Scoring' section.
- Update the 'Status' and the 'Actual Action Step Completion Date' fields in the 'Action Steps' section.
- Once the goal is updated, click the 'Save' to return to the 'FSSP Goals' step/screen.

Repeat this process for each goal associated with the FSSP. Once you are done making updates to goals for that family member, click on 'Done Entering Goals' to proceed and repeat this process for each associated member of the family.

Participant Goals Associated with this FSSP

1 result found.

Goal ID	Goal Category	Primary Goal	Goal Classification	Associated Enrollment or FSSP	Date Set	Target Date	Most Recent Score	Most Recent Score Date	Outcome	Completion Date
Complete Resume	Employment	No		07/12/2024 - Family Self-Sufficiency Plan	02/21/2024	02/21/2025	1 - At Risk	02/21/2024		

2) Once Goals have been updated, click here to proceed → Done Entering Goals

## 12 Month Follow-Up

The 12 Month Follow-Up can be completed by following the same process for completing the 6 Month Follow-Up with more fields and questions to be completed and answered:

- Select an option/answer from the 'How was the 12 Month Follow-up data collected?' drop-down list.

Family Self-Sufficiency Plan Follow-up

Flowers, Dad 4924 Daisy Way 1/1/1980

FSSP Follow-Up

FSSP Follow-up: 12 Month Follow-up

Any FSSP Follow-ups already recorded will appear below. If your organization wrote the initial FSSP, you may also enter new information for new follow-ups. If you wrote the initial FSSP you will only be able to view the information for previously recorded follow-ups.

FSSP Follow-Up or Revision Type: \* 12 Month Follow-up

FSSP Follow-up or Revision Date: \* 10/23/2024

6-Month Follow-up Date: 04/22/2025

12-Month Follow-up Date: 10/22/2025

Assessed By: Anwar Sallumi

Organization: Department of Children and Families

Associated Enrollment: \* 09/29/2023 - RSS - Employment & Employability - Flowers, Dad

I have reviewed this individual/family's FSSP and attest that the family is engaged and working toward meeting their previously e

How was 12-month follow-up information collected? -- SELECT --

Please describe any new referrals made to support the family's goal(s):

12-month follow-up interview with client or family member  
Unable to reach client and used exit interview prior to 12 months  
Unable to reach client and used case file documentation  
Unable to reach client and unable to provide information

Comments:

- Click the 'Next' button to move to the next step which shows the first family member's FSSP Goals. Update the goals the same way as in the 6 Month Follow-Up process.

- Click the 'Done Entering Goals' button after completing the FSSP Goals of the first family member to move to the other family members' goals. View, edit, update, or add goals if needed.
- Click the 'Done Entering Goals' button again to move to the 'FSSP Follow-up Summary' step/screen which is the final step in this '12 Month Follow-up' workflow.
- Review the info in the 12 Month Follow-Up Summary fields about each family member.
- Make sure that the question 'Was the Initial Primary Goal Met?' was already answered and listed. This will be automatically populated from the 'Outcome' answer after updating the goals and making its Status as "Closed" in the previous step. If the goal and its Status were not updated and the 'Outcome' question was not answered, the warning message "Goal is still Open, please Close the goal and select and Outcome" will be listed in this field instead.
- Use the available links to update the Education Level and English Proficiency or to Add New Employment Information.
- Once all information related to Family Members has been verified and updated as needed and required, click the 'Save & Print' to save and print the Follow-up information, or click the 'Save & Close' button to save and finish the 12 Month Follow-Up workflow.

The screenshot displays the 'FSSP Follow-up Summary' interface for two participants: Flowers, Mom and Flowers, Dad. The interface includes a sidebar with navigation options and a main content area with search results. Red boxes and arrows highlight key elements:

- Flowers, Mom:**
  - A warning message: "The warning message when the goal and its status are not updated" points to the "Was the Initial Primary Goal met?" dropdown menu, which currently shows "Goal is still Open, please Close the goal and select an Outcome".
  - Links for "Add New Employment History" and "Update Education Level/English Proficiency" are highlighted.
- Flowers, Dad:**
  - A note: "The correct answer and option was automatically populated after updating the goal and its status." points to the "Was the Initial Primary Goal met?" dropdown menu, which shows "No. Client progressing within initial referral service".