Family Assessment Collection Tool (FACT)

User Manual

Family Coach & Engagement Specialist

Family Assessment Collection Tool (FACT)

Introduction to FACT

What is the Purpose of FACT?

The Family Assessment Collection Tool (FACT) was created to capture, store, and retrieve the results of the Family Assessment. FACT captures the results of the:

- Strength Cards,
- Each domain in the assessment categories; and
- A participant's supports, inspirations, goals, and actions.

FACT can produce several participant specific reports, which will be discussed later in detail.

What FACT is Not Intended to Do?

FACT is not intended to be used as a participant portal to the Family Assessment. Results would be entered after the discussion with the participant. However, if conducting the Family Assessment over the phone it is recommended to enter results as the assessment is being conducted. It is best to have practice entering results into FACT before attempting to enter results while conducting the Family Assessment over the phone.

Later we will show how to create participant specific reports. These reports will provide the participant a view of their results to include a goal plan with goals and actions.

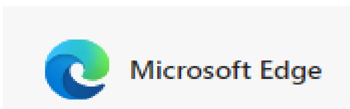
Getting Started

There are a few things a FACT user will need to do prior to using the application.

First thing is to make sure you have Microsoft Edge Chromium installed on your computer. FACT will not work with Microsoft Internet Explorer or

Firefox. Users should already have Microsoft Edge installed on their work computers. Follow these steps to ensure you are using the most up-to-date version of Edge.

- Click on the Search icon at the bottom left of your screen.
- Type in ‘Software Center’
- Open the Software Center window. In the top right type ‘Edge’ into the search box.
- If Microsoft Edge Chromium appears, click on <Install>. This will install/update Microsoft Edge to Microsoft Edge Chromium. The new icon will look like this:



User Navigation

NOTE…

If you are logging into FACT for the first time, you will need to set up your user settings before entering family assessment results. Click on your name on the top right on the Green Bar and change your default settings. See Opening User Settings.

Green Bar

The “Green Bar” is where you navigate through FACT and would be able to add, review, update results, view, and print reports, and use quick links to guides and tools. You can also maneuver to your Settings by clicking on you name.

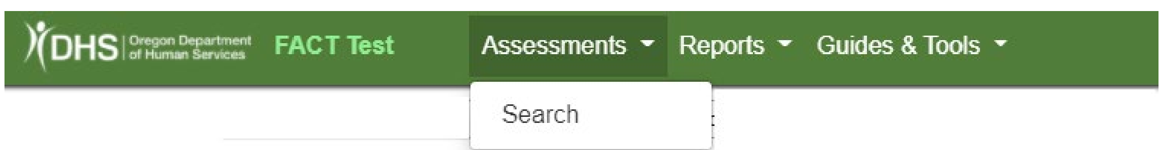
Family Assessment Collection Tool (FACT)

Home

Family Coaches and Engagement Specialists have their own dashboards. To get to your dashboard click on the DHS logo on the left-hand side of the Green Bar.

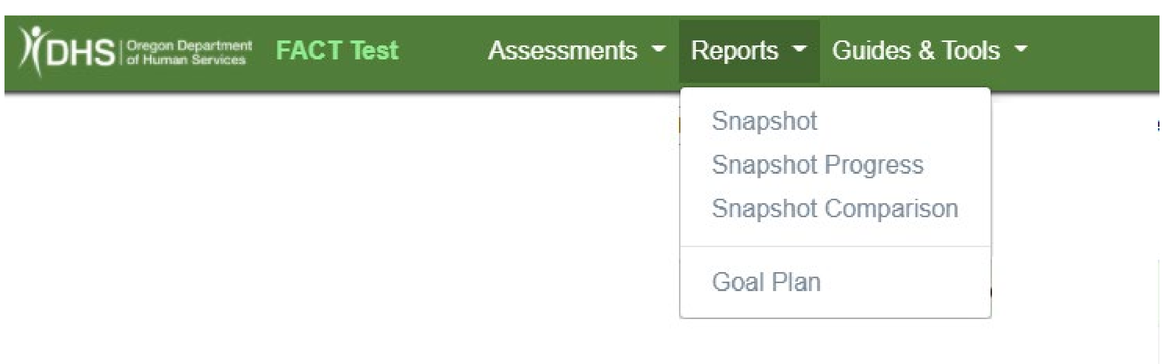
Assessments

When you click on the <Assessments> dropdown you will see the 'Search' selection. Clicking on <Search> will open the search function in FACT.



Reports

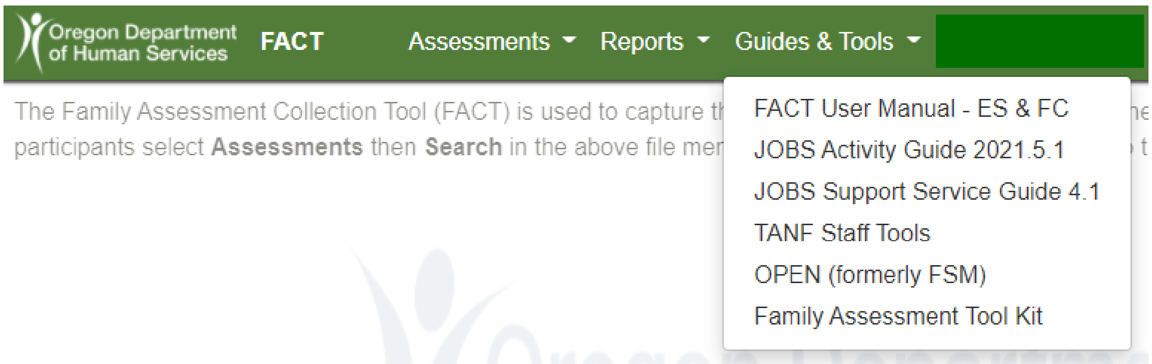
Once the results of a Family Assessment have been entered, you will have the opportunity to produce several reports and a goal plan for your participant. We will cover each of these three reports and the Goal Plan later in the manual.



Family Assessment Collection Tool (FACT)

Guides & Tools

The Guides & Tools dropdown gives you the ability to quickly connect to resources such as the JOBS Activity Guidelines, JOBS Support Services Guide, Oregon Programs Eligibility Notebook (OPEN), and other useful locations.



User Settings

Opening User Settings

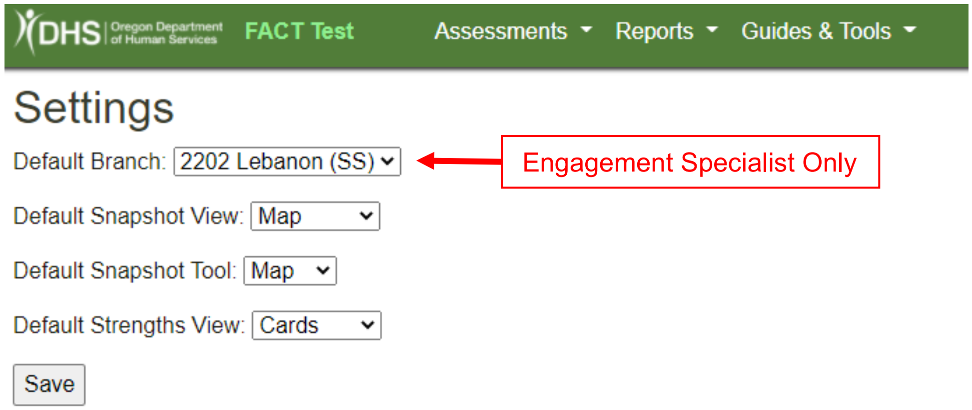
If you are logging into FACT for the first time, you will need to set up your user settings. Click on your name at the top right on the Green Bar to change your default settings.

FACT users can choose settings, which would be most used when conducting a Family Assessment and are most comfortable when using. For Engagement Specialists there is an option to set the branch where they spend the most time.

'Default' settings include:

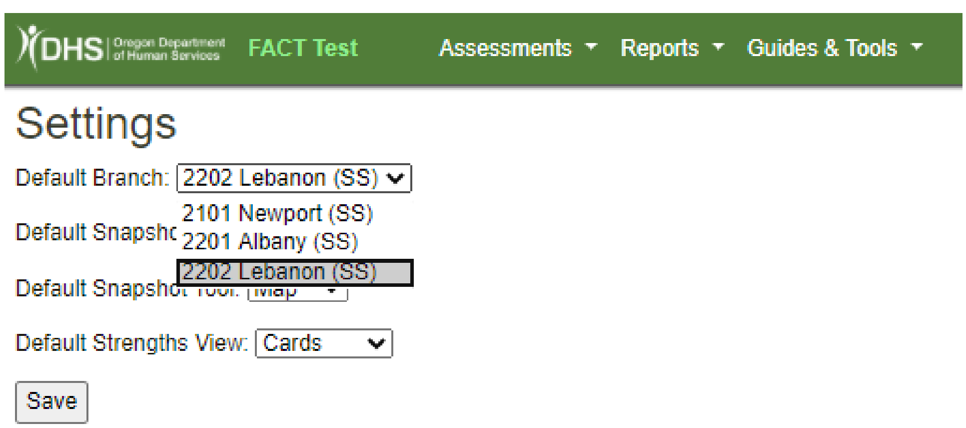
- Branch (Engagement Specialists only),
- Snapshot View,
- Snapshot Tool, and
- Strengths View.

The default selection can be changed at any time.



Default Branch (Engagement Specialist only)

Many Engagement Specialist (ES) cover multiple branches in a District. The 'Default Branch' allows the ES to choose the branch where they spend the majority of the time. As seen below the ES is choosing Branch 2202 Lebanon (SS) as the default. Choose the Branch from the dropdown and click on <Save>. Regardless of the Branch they choose, ES's will have access to any Branch within the District.

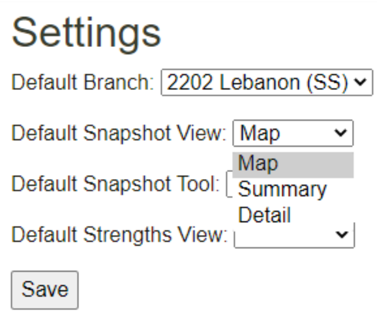


Family Assessment Collection Tool (FACT)

Default Snapshot View

There are three choices for Snapshot View. They include:

- Map,
- Summary, and
- Detail.



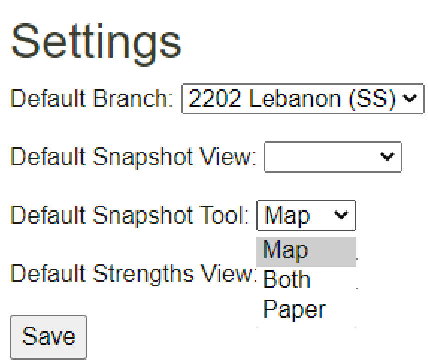
We will look at each of these views later in the manual. You can go to them now by pressing the following link: Adding a New Family Assessment Results.

When entering Family Assessment results the user can switch between views. This will be explained later in the manual.

Default Snapshot Tool

The Snapshot Tool indicates which method was used when conducting the Family Assessment. There are three options, which include:

- Map,
- Paper, or
- Both.



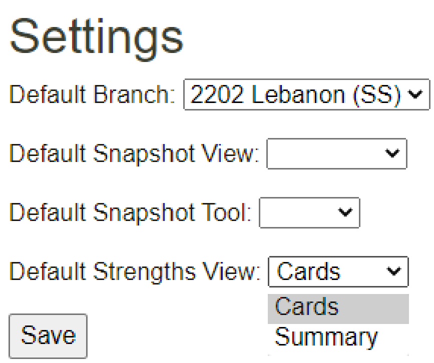
This setting would be set to the method most often used but can be changed when entering results.

Family Assessment Collection Tool (FACT)

Default Strengths View

There are two choices related to how a user would view the Strengths when entering results. They include:

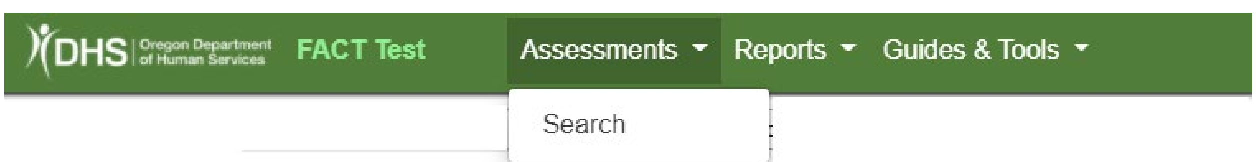
- Cards
- Summary



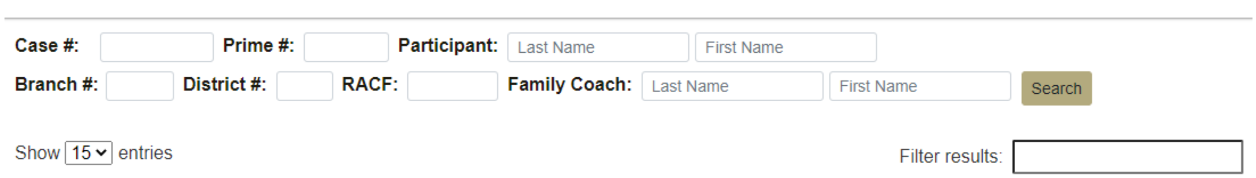
Like the Default Snapshot View and Tool, the Default Strength View can be changed with entering results.

Search Screen

Searching by…



When you click on the <Assessment> dropdown and then <Search> you will see the image below. Family Coaches will see their name pre-populated in the Family Coach search boxes.



Family Assessment Collection Tool (FACT)

The Search function allows you to search using a variety of information. This includes:

- Searching for Participant by using:
  - Case number,
  - Prime number,
  - Last name,
  - First name,
- Search for Cases associated with:
  - Branch,
  - District,
  - Family Coaches RACF,
  - Family Coaches Last and/or First name.

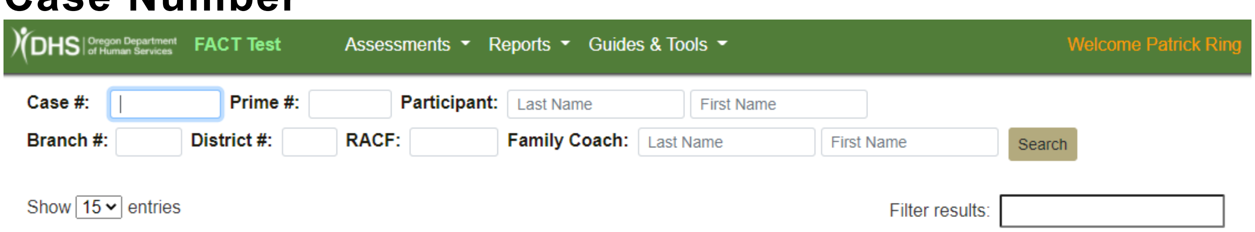
The list of entries is limited to 500. Depending on the search criteria the results could surpass the 500-entry limit. Keep this in mind when entering your search criteria. You may need to narrow your search to find the entry you are looking for.

There is a function called “Wildcard” (*), which gives you the ability to narrow a search. The wildcard works two different ways.

- Type an asterisk (*) into a field preceded by an alphanumeric depending on the search criteria. For example, if you are searching for a last name that begins with “M” you would type <M*>. This will bring up all the last names beginning with the letter “M”.

- Type an asterisk (*) into a field followed by an alphanumeric depending on the search criteria. For example, if you are searching for a last name ending with the letter “N” you would type <*N>. This will bring up all the last names ending with the letter “N”.

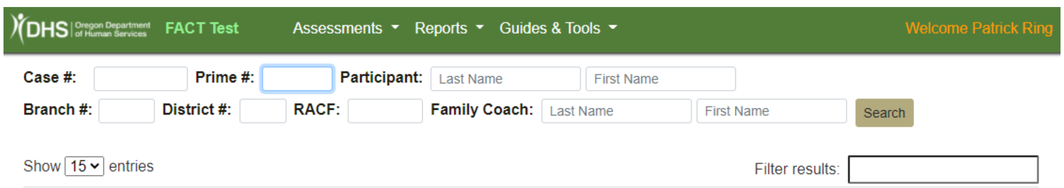
Case Number



Family Assessment Collection Tool (FACT)

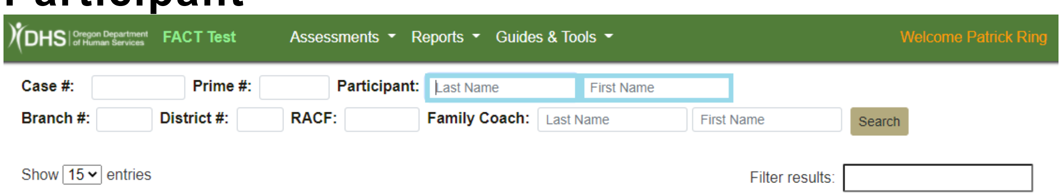
To search by a participant's case number, all you need to do is enter the case number into the 'Case #' box. Using an exact case number will bring up participants associated with that case number. FACT allows you to add Family Assessment results for anyone in the Need Group.

Prime Number



To search by a participant's prime number simply type or copy and paste the number into the 'Prime #' box. This will only bring up one entry unless you use the Wildcard (*) function.

Participant



Searching by participant gives you several options. You can search by last name, first name or use the Wildcard (*).

Using the Wildcard (*) you can search by a name that begins with a specific letter or set of letters. It does not matter if you use upper- or lower-case.

Examples of searching by first name:

- <J*> brings up all the first names beginning with 'J' such as Janae, Jenna, Jeremy, Juanita, etc.
- <JO*> brings up first names beginning with 'JO' such as Jolandra, Jordan, John, Joy, etc.
- <*R> brings up all the first names ending with the letter 'R' such as Amber, Bakar, Cesar, Jennifer, Heather, Tanner, etc.

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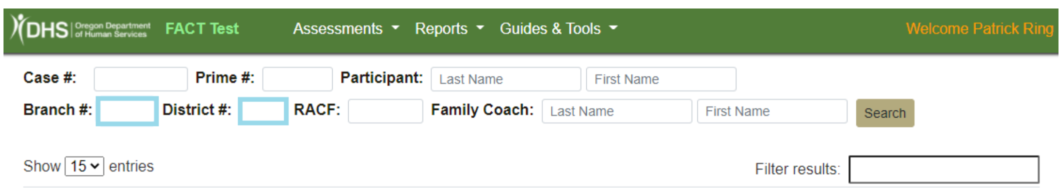
Examples of searching by last name:

- <W*> brings up all last names beginning with 'W' such as Watson, Walker, Wewa, Wynn, etc.
- <Wil*> bring up all last names beginning with 'Wil' such as Williams, Wilson, Wilcox, Wilkes, etc.
- <*S> brings up all last names ending in 'S' such as Davis, Lewis, Reyes, Riggs, Santos, etc.
- <*LES> will bring up all last names ending in 'LES' such as Charles, Giles, Gonzales, Morales, Wales, etc.

Branch and District Number

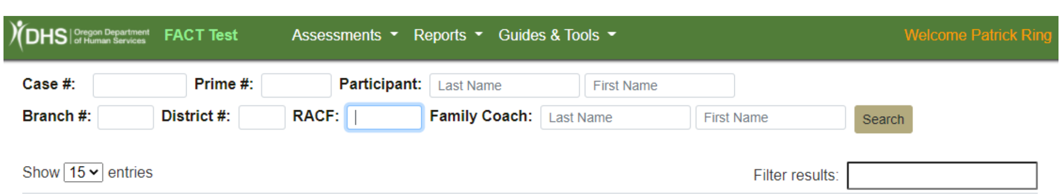


Searching by Branch and District gives you several options.

- If you know the Branch number, simply type in the 4-digit number. Or type in the 2-digit number for the District.

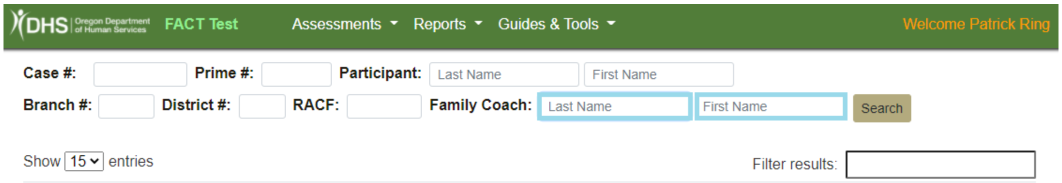
- You can also type a partial number in the Branch box. You can also use the Wildcard (*) function preceded or followed by a number or numbers. For example: you type <*03>. This will result in displaying all Branches ending in '03'.

RACF



Searching by RACF allows you to look up cases connected to a person's RACF. Simply enter a RACF number into the box and click on <Search>.

Family Coach



A Family Coach will see their own name populated in the ‘Family Coach’ boxes when opening the Search window. This allows a Family Coach an easy path to searching for their cases and participants.

Searching by Family Coach allows the user to look up cases connected to any Family Coach. You can search by Last, First or partial name. The Wildcard (*) function is an option as well.

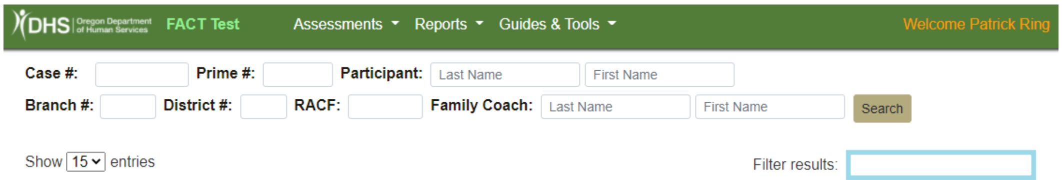
Using the Wildcard (*) you can search by a last or first name that begins with or ends with a specific letter or set of letters. It does not matter if you use upper- or lower-case.

Examples of searching by first name:
- <M*> brings up all the first names beginning with ‘M’ such as Martha, Melissa, Merranda, Miguel, Mily, etc.
- <MO*> brings up first names beginning with ‘MO’ such as Mohamed, Mona, Monica, Molly, etc.
- <*N> brings up all the first names ending with the letter ‘N’ such as Allison, Carmen, Dawn, John, Mychon, Shanon, etc.
- <*EN> brings up all the first names ending with the letters ‘EN’ such as Carmen, Colleen, Helen, Kathleen, Steven, etc.

Examples of searching by last name:
- <S*> brings up all last names beginning with ‘S’ such as Sanchez, Scott, Silva, Stewart, etc.
- <STE*> bring up all last names beginning with ‘STE’ such as Stephens, Stewart, Stenson, etc.
- <*E> brings up all last names ending in ‘E’ such as Aguirre, Burnside, Payne, Racine, Resare, Stone, Uribe, etc.
- <*ES> will bring up all last names ending in ‘ES’ such as Barnes, Cervantes, Giles, Jones, Wales, etc.

Family Assessment Collection Tool (FACT)

Using the Filter Function



The ‘Filter results’ function allows the user to filter the results of a search. When you place an alpha or numeric value in the ‘Filter results’ box, any row in any column with the filter criteria will show. For example:

- A user opens the search window from the ‘Assessments’ dropdown and click on the <Search> selection. The user then clicks on the <Search> button to the right of the Family Coach’s name box.
- The user adds the following to the ‘Filter results’ box – AN.
- Any ‘AN’ found in the participant’s last or first name, Prime #, or Family Coach’s last or first name will now show. Examples:
    - Cervantes
    - Brianna
    - Evans
    - Stephanie
- The user adds the following to the ‘Filter results’ box – 11.
- Any ‘11’ found in the Case #, Prime #, or Created date will now show.
    - HM2011
    - BD1105X5S
    - 11/20/2020
    - 08/11/2020

FACT User Roles

There are six types of user roles that define the access a user has in FACT. The type of access is dependent upon what the user will need to accomplish. The following will provide a description of each role and what they can do.

- Limited Access User
- Standard Access User
- User Manager
- Administrator
- Family Coach
- Engagement Specialist

Limited Access User

A limited access user would be able to do all the following:

- Conduct a search for a participant's assessment results,
- Create and read assessment notes,
- Read task notes,
- Read assessment task list,
- Read the results of the Strength survey,
- Read the results of the Snapshot survey,
- Read the goals, actions, inspirations, and supports, and
- Read and print participant reports.

Limited access user would typically be a Case Aides, Reception staff, QA/QC reviewer, Hearing Representative, etc.

Standard Access User

A standard user would be able to do all the following:

- Conduct a search of a participant's assessment results,
- Create and read assessment,

- Create and read task notes,
- Create, read, and update assessment task list,
- Enter, read, and update Strength assessment results,
- Enter, read, and update Snapshot assessment results,
- Enter, read, and update goals, actions, inspirations and supports, and
- Read and print participant reports.

The Standard user would typically be a Benefit Eligibility Specialist (BES), Community Partnership Coordinator (CPC), Branch Operations Manager, Case Aid, etc. Standard users would be able to conduct and/or enter results from a Family Assessment.

User Manager

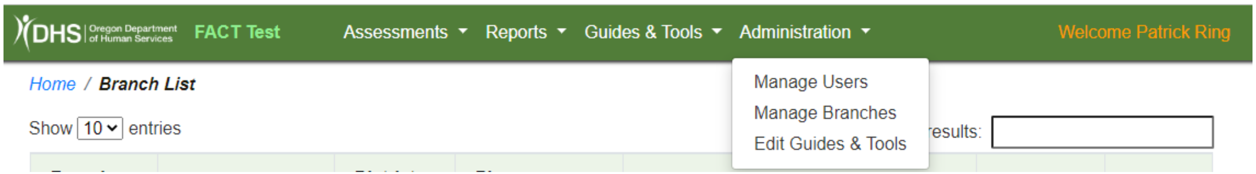
The User Managers would be able to do all the following:

- Conduct a search of a participant's assessment results,
- View results of closed assessments to include task and assessment notes,
- For all open assessments:
  - Create and read assessment notes,
  - Create and read task notes,
  - Create, read, and update assessment task list,
  - Enter, read, and update Strength assessment results,
  - Enter, read, and update Snapshot assessment results,
  - Enter, read, and update goals, actions, inspirations and supports,
- Read and print participant reports, and
- Update a user's role to include activating or deactivating a user.

The main function of a User Manager is updating current user's roles within the Family Assessment Collection Tool. When an individual changes position, for instance from Family Coach to an Engagement Specialist or Family Coach to a Branch Operations Manager, their access in FACT would need to be changed. The User Manager would be responsible for making this change.

Family Assessment Collection Tool (FACT)

Administrator



The Administrator can do all the following:

- Conduct a search of a participant’s assessment results,
- View results of closed assessments to include task and assessment notes,
- For open assessments:
  - Create and read assessment and task notes,
  - Create, read, and update assessment task list,
  - Enter, read, and update Strength assessment results and Snapshot assessment results, and
  - Enter, read, and update goals, actions, inspirations and supports.
- For closed assessments:
  - Edit assessment and task notes,
  - Edit assessment task list,
  - Edit Strength assessment and Snapshot assessment results,
  - Edit goals, actions, inspirations and supports,
  - Delete part or the entire family assessment results.
- Read and print participant reports,
- Add or remove a user,
- Update a user’s role to include activating or deactivating a user,
- Add, edit, and delete Guides and Tools,
- Edit and update Branch information.

The Administrators will be comprised of all the TANF Policy Analysts. They will have several main functions. These main functions include:

- Adding new users to FACT.
- Editing and/or deleting closed family assessment results.
- Adding and updating Guides and Tools.
- Editing and updating Branch information.

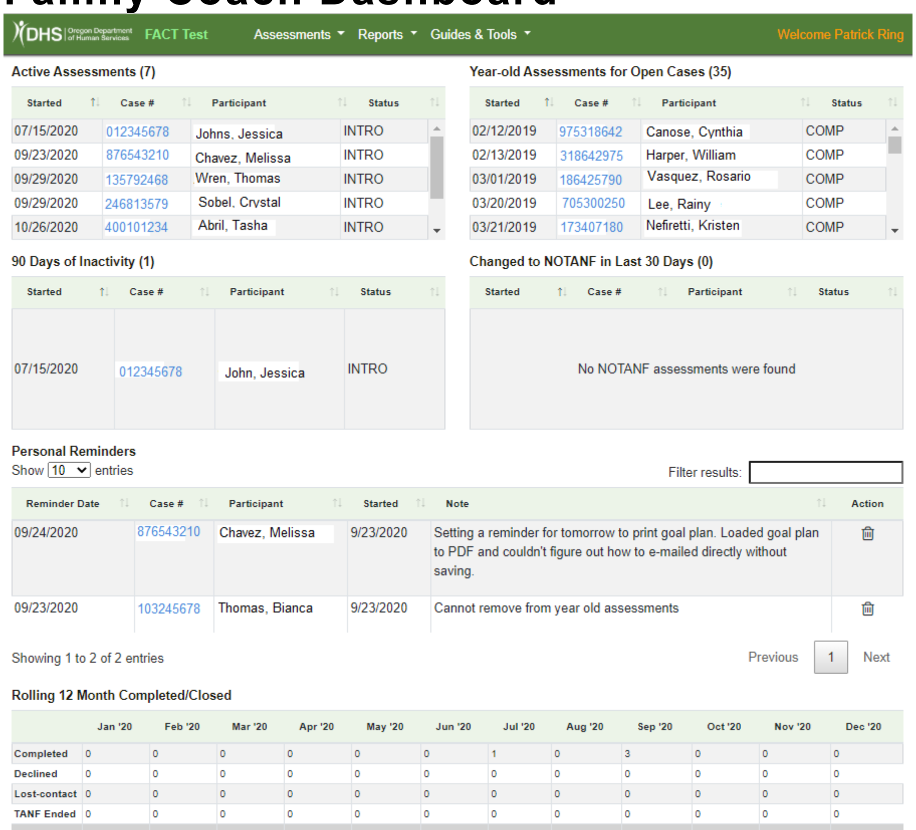
Family Assessment Collection Tool (FACT)

Family Coach

A Family Coach can do the following:

- Conduct a search of a participant's assessment results,
- View results of closed assessments to include task and assessment notes,
- Create new assessment results and update open assessment results,
- For open assessments:
    - Create and read assessment and task notes,
    - Create, read, and update assessment task list,
    - Enter, read, and update Strength assessment and Snapshot assessment results, and
    - Enter, read, and update goals, actions, inspirations and supports.
- Review closed assessment results including creating reports, and
- Read and print participant reports.

Family Coach Dashboard



Family Assessment Collection Tool (FACT)

Active Assessments

The ‘Active Assessments’ section will show all assessment results, which have begun to be entered but have not been finalized.

Active Assessments (7)

Started	Case #	Participant	Status
07/15/2020	012345678	Johns, Jessica	INTRO
09/23/2020	876543210	Chavez, Melissa	INTRO
09/29/2020	135792468	Wren, Thomas	INTRO
09/29/2020	246813579	Sobel, Crystal	INTRO
10/26/2020	400101234	Abril, Tasha	INTRO

Year Old Assessments

‘Year-old Assessments for Open Cases’ will display open TANF participants where the last family assessment results were entered into FACT more than 12-months ago.

These are participants who will need to be contacted to conduct a new family assessment.

Year-old Assessments for Open Cases (35)

Started	Case #	Participant	Status
02/12/2019	975318642	Canose, Cynthia	COMP
02/13/2019	318642975	Harper, William	COMP
03/01/2019	186425790	Vasquez, Rosario	COMP
03/20/2019	705300250	Lee, Rainy	COMP
03/21/2019	173407180	Nefiretti, Kristen	COMP

90 Days Inactive Assessments

The ‘90 Days Inactive Assessments’ will display those participants where the results have begun to be entered but not completed and there has been no interaction with FACT for at least 90 days or more.

Family Assessment Collection Tool (FACT)

90 Days of Inactivity (1)

Started	Case #	Participant	Status
07/15/2020	012345678	John, Jessica	INTRO

Changed to NO TANF

‘Changed to NOTANF in Last 30 Days’ includes any cases and participants whose TANF case closed after family assessment results had begun to be entered but had not been completed. FACT will automatically change the status to NOTANF when a TANF case closes in ONE. ONE informs TRACS of the closure and TRACS will update the status and send this information to FACT.

Changed to NOTANF in Last 30 Days (0)

Started	Case #	Participant	Status
	No NOTANF assessments were found		

Personal Reminders

‘Personal Reminders’ display any reminders you (as a Family Coach); other Family Coaches or Engagement Specialists may have left. Reminders can be deleted when they are no longer needed. Simply click on the <Trashcan> under the ‘Action’ column to delete the reminder. Reminders will remain in the notes section of the assessment record or task.

Personal Reminders

Show 10 entries Filter results:

Reminder Date	Case #	Participant	Started	Note	Action
09/24/2020	876543210	Chavez, Melissa	9/23/2020	Setting a reminder for tomorrow to print goal plan. Loaded goal plan to PDF and couldn't figure out how to e-mailed directly without saving.	
09/23/2020	103245678	Thomas, Bianca	9/23/2020	Cannot remove from year old assessments	

Showing 1 to 2 of 2 entries Previous 1 Next

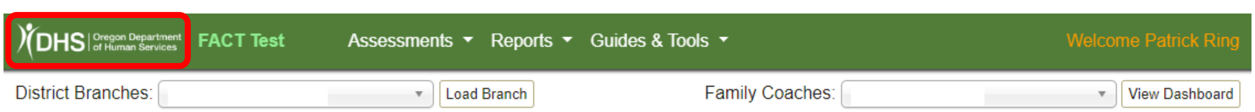
Rolling 12-Month Summary

The 'Rolling 12 Month Completed/Closed' section displays all the family assessment results, which have been entered over the past 12 months. The display includes Completed; Declined (entire family assessment); Lost contact; and TANF Ended records.

Rolling 12 Month Completed/Closed

	Jan '20	Feb '20	Mar '20	Apr '20	May '20	Jun '20	Jul '20	Aug '20	Sep '20	Oct '20	Nov '20	Dec '20
Completed	0	0	0	0	0	0	1	0	3	0	0	0
Declined	0	0	0	0	0	0	0	0	0	0	0	0
Lost-contact	0	0	0	0	0	0	0	0	0	0	0	0
TANF Ended	0	0	0	0	0	0	0	0	0	0	0	0
Totals	**0**	**0**	**0**	**0**	**0**	**0**	**1**	**0**	**3**	**0**	**0**	**0**

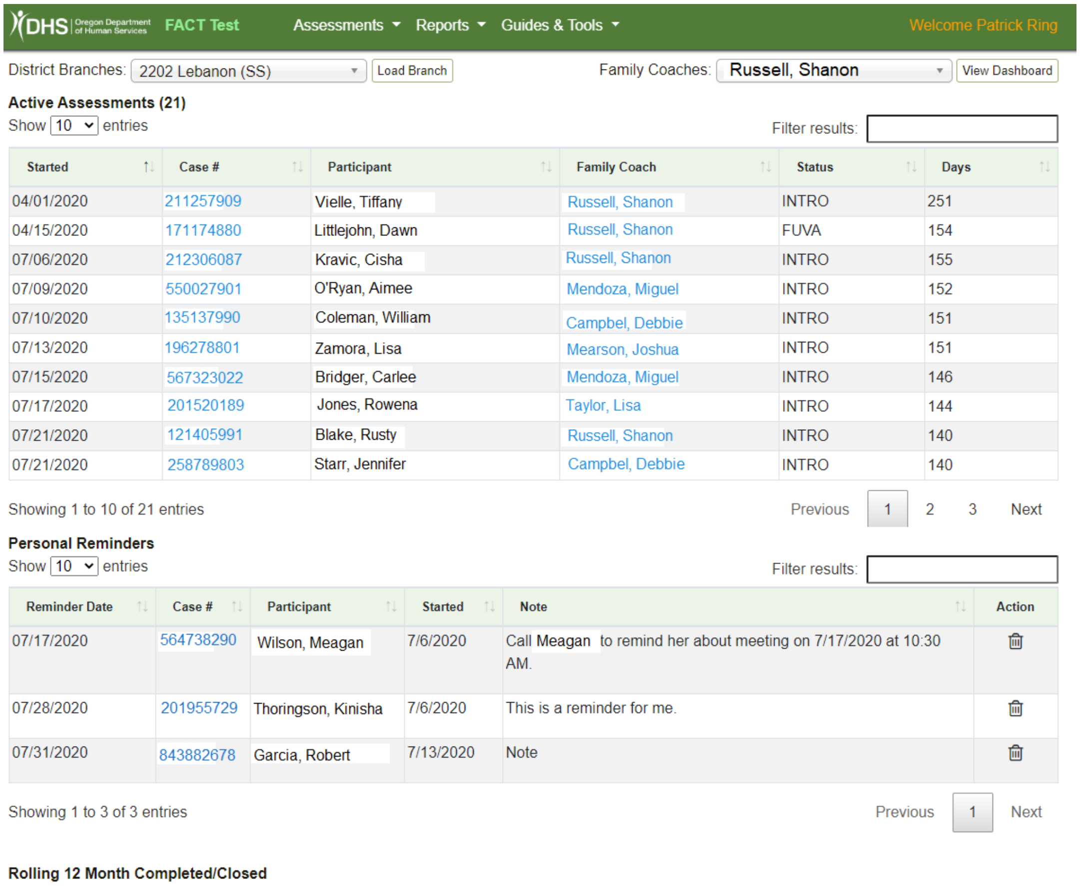
Engagement Specialist



Dashboard

Like the Family Coach, Engagement Specialists have their own 'Dashboard'. ES's can access their dashboard by clicking on the DHS logo on the left-hand side of the green bar.

Family Assessment Collection Tool (FACT)



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District Branches: 2202 Lebanon (SS) Load Branch Family Coaches: Russell, Shanon View Dashboard

Active Assessments (21)

Show 10 entries Filter results:

Started	Case #	Participant	Family Coach	Status	Days
04/01/2020	211257909	Vielle, Tiffany	Russell, Shanon	INTRO	251
04/15/2020	171174880	Littlejohn, Dawn	Russell, Shanon	FUVA	154
07/06/2020	212306087	Kravic, Cisha	Russell, Shanon	INTRO	155
07/09/2020	550027901	O'Ryan, Aimee	Mendoza, Miguel	INTRO	152
07/10/2020	135137990	Coleman, William	Campbel, Debbie	INTRO	151
07/13/2020	196278801	Zamora, Lisa	Mearson, Joshua	INTRO	151
07/15/2020	567323022	Bridger, Carlee	Mendoza, Miguel	INTRO	146
07/17/2020	201520189	Jones, Rowena	Taylor, Lisa	INTRO	144
07/21/2020	121405991	Blake, Rusty	Russell, Shanon	INTRO	140
07/21/2020	258789803	Starr, Jennifer	Campbel, Debbie	INTRO	140

Showing 1 to 10 of 21 entries Previous 1 2 3 Next

Personal Reminders

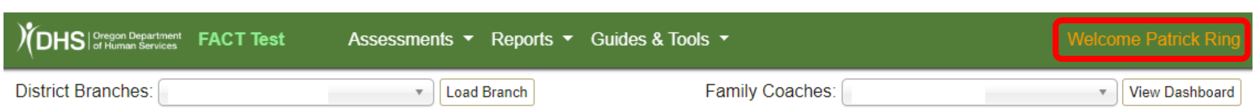
Show 10 entries Filter results:

Reminder Date	Case #	Participant	Started	Note	Action
07/17/2020	564738290	Wilson, Meagan	7/6/2020	Call Meagan to remind her about meeting on 7/17/2020 at 10:30 AM.	
07/28/2020	201955729	Thoringson, Kinisha	7/6/2020	This is a reminder for me.	
07/31/2020	843882678	Garcia, Robert	7/13/2020	Note	

Showing 1 to 3 of 3 entries Previous 1 Next

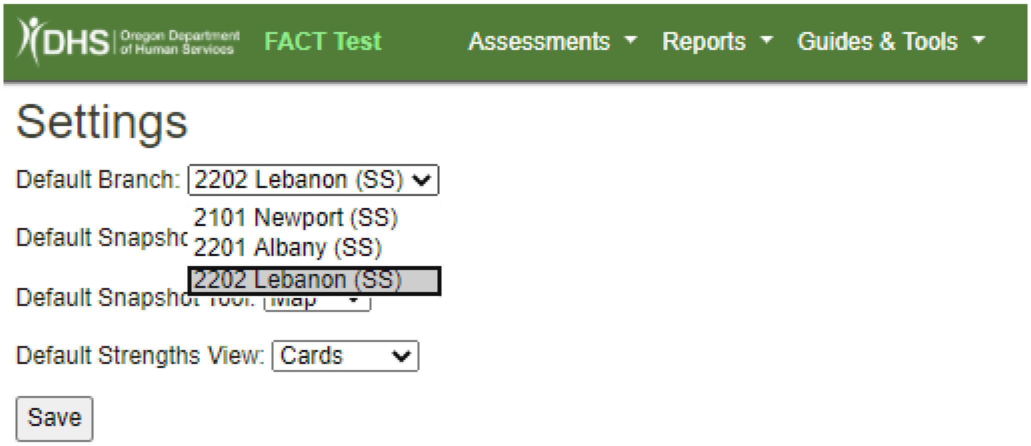
Rolling 12 Month Completed/Closed

Selected Branch

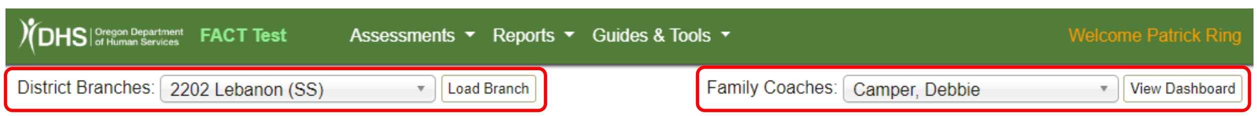


Many ESs will cover more than one branch in their district. In FACT, under 'Settings', the ES can choose a default branch where they spend the majority of the time. Click on you name at the top right on the 'Green Bar' to enter the default settings window. Click on the dropdown for 'Default Branch' and choose the desired branch and then click <Save>. Only Branches in the District where the ES is assigned with be displayed.

Family Assessment Collection Tool (FACT)



Selected Family Coach



The Engagement Specialist can select and view any Family Coach's dashboard if the FC is connected to one of the branches within the ES's district.

Select the correct branch from the 'District Branches' dropdown on the left and click on <Load Branch>. Then select the Family Coach from the 'Family Coaches' dropdown on the right and click on <View Dashboard>.

Active Assessments

Active Assessments are open records in FACT where results have begun to be entered but have not been completed. The ES dashboard will display all the active assessment for each of the Family Coaches in the selected branch.

In this instance, the ES is viewing branch 2202, Lebanon. Below are those participants with active assessments in branch 2202.

Family Assessment Collection Tool (FACT)

Active Assessments (21)

Show 10 entries Filter results:

Started	Case #	Participant	Family Coach	Status	Days
04/01/2020	211257909	Vielle, Tiffany	Russell, Shanon	INTRO	251
04/15/2020	171174880	Littlejohn, Dawn	Russell, Shanon	FUVA	154
07/06/2020	212306087	Kravic, Cisha	Russell, Shanon	INTRO	155
07/09/2020	550027901	O'Ryan, Aimee	Mendoza, Miguel	INTRO	152
07/10/2020	135137990	Coleman, William	Campbel, Debbie	INTRO	151
07/13/2020	196278801	Zamora, Lisa	Mearson, Joshua	INTRO	151
07/15/2020	567323022	Bridger, Carlee	Mendoza, Miguel	INTRO	146
07/17/2020	201520189	Jones, Rowena	Taylor, Lisa	INTRO	144
07/21/2020	121405991	Blake, Rusty	Russell, Shanon	INTRO	140
07/21/2020	258789803	Starr, Jennifer	Campbel, Debbie	INTRO	140

Showing 1 to 10 of 21 entries Previous 1 2 3 Next

Personal Reminders

Engagement Specialists can set up reminders for themselves, Family Coaches, or both. The ES chooses who receives the reminder by using the 'Remind' dropdown as seen below.

Show 10 entries Filter results:

Note	Created By	Date
Call Meagan to remind her about meeting on 7/17/2020 at 10:30 AM.	Ring, Patrick	7/13/2020 5:32:59 PM

Showing 1 to 1 of 1 entries Previous 1 Next

After selecting who will receive the reminder, a date needs to be added. The date needs to be in the future. Add the information in the 'Assessment Note' section. Once a reminder is saved it will show up on the dashboards of those selected to receive the reminder.

Personal Reminders

Show 10 entries Filter results:

Reminder Date	Case #	Participant	Started	Note	Action
07/17/2020	564738290	Wilson, Meagan	7/6/2020	Call Meagan to remind her about meeting on 7/17/2020 at 10:30 AM.	
07/28/2020	201955729	Thoringson, Kinisha	7/6/2020	This is a reminder for me.	
07/31/2020	843882678	Garcia, Robert	7/13/2020	Note	

Showing 1 to 3 of 3 entries Previous 1 Next

Rolling 12-Month Summary

Rolling 12 Month Completed/Closed

Show 10 entries   Filter results:

Status	Family Coach	Jan '20	Feb '20	Mar '20	Apr '20	May '20	Jun '20	Jul '20	Aug '20	Sep '20	Oct '20	Nov '20	Dec '20
Completed	Campbel, Debbie	0	0	0	0	0	0	1	0	3	0	0	0
Declined	Campbel, Debbie	0	0	0	0	0	0	0	0	0	0	0	0
Lost-contact	Campbel, Debbie	0	0	0	0	0	0	0	0	0	0	0	0
TANF Ended	Campbel, Debbie	0	0	0	0	0	0	0	0	0	0	0	0
Totals	Campbel, Debbie	**0**	**0**	**0**	**0**	**0**	**0**	**1**	**0**	**3**	**0**	**0**	**0**
Completed	Deamus, Lisha	0	0	0	0	0	0	1	0	0	0	0	0
Declined	Deamus, Lisha	0	0	0	0	0	0	0	0	0	0	0	0
Lost-contact	Deamus, Lisha	0	0	0	0	0	0	0	0	0	0	0	0
TANF Ended	Deamus, Lisha	0	0	0	0	0	0	0	0	0	0	0	0
Totals	Deamus, Lisha	**0**	**0**	**0**	**0**	**0**	**0**	**1**	**0**	**0**	**0**	**0**	**0**

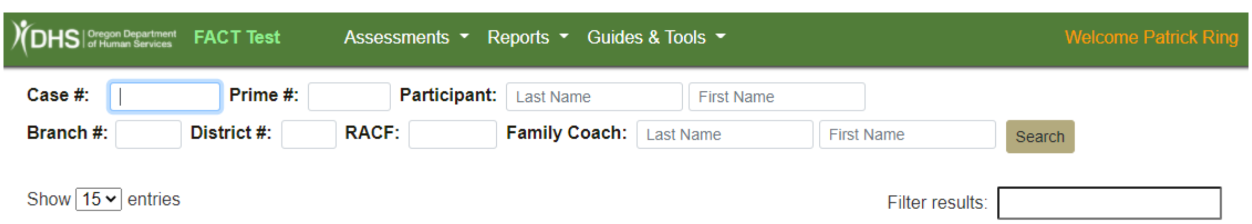
Showing 1 to 10 of 40 entries   Previous 1 2 3 4 Next

The 'Rolling 12-Month Summary' displays the month-to-month numbers of Family Assessment results entered into FACT. The record will be included when:

- Completed
- Declined
- Lost-contact, or
- TANF Ended

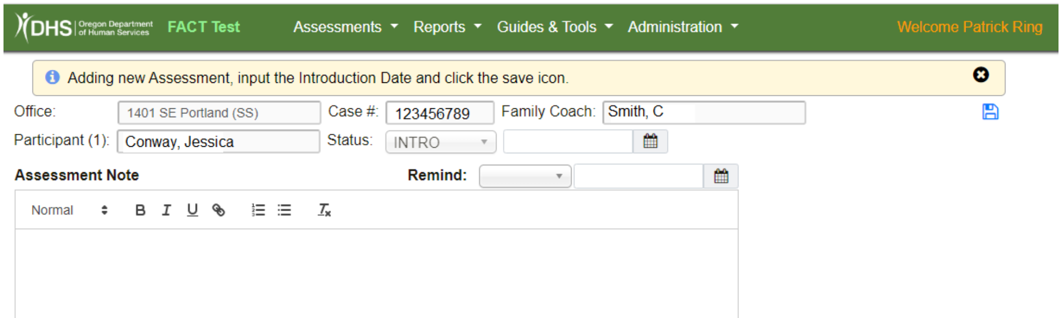
Family Assessment Results

Navigation – Look and Feel



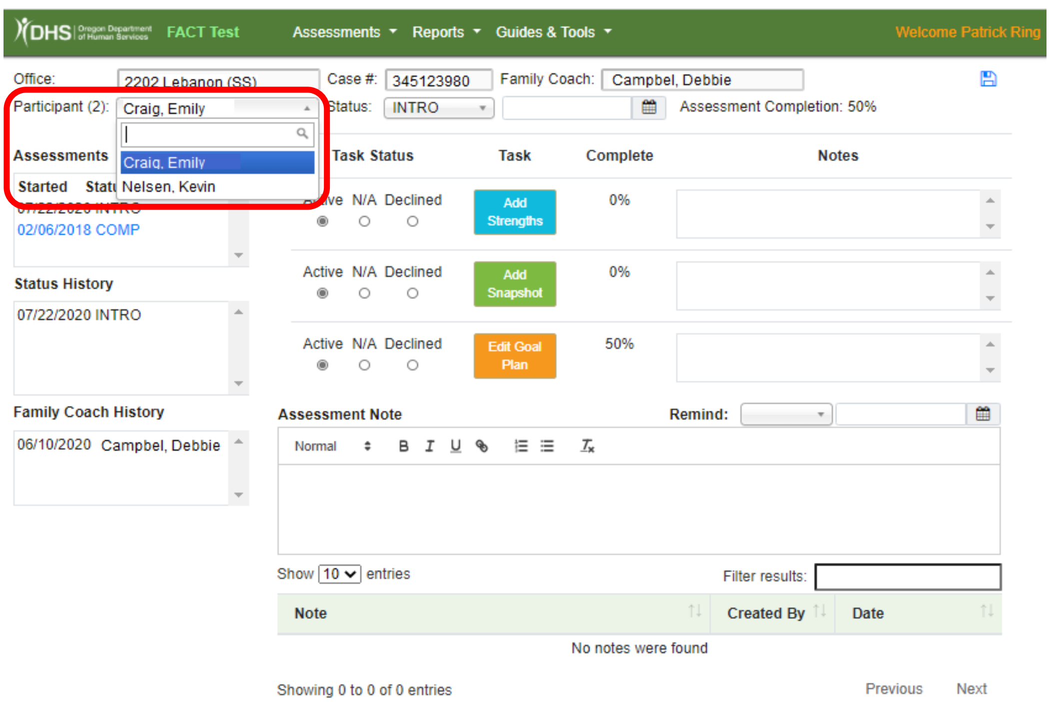
Family Assessment Collection Tool (FACT)

Family Assessment Header



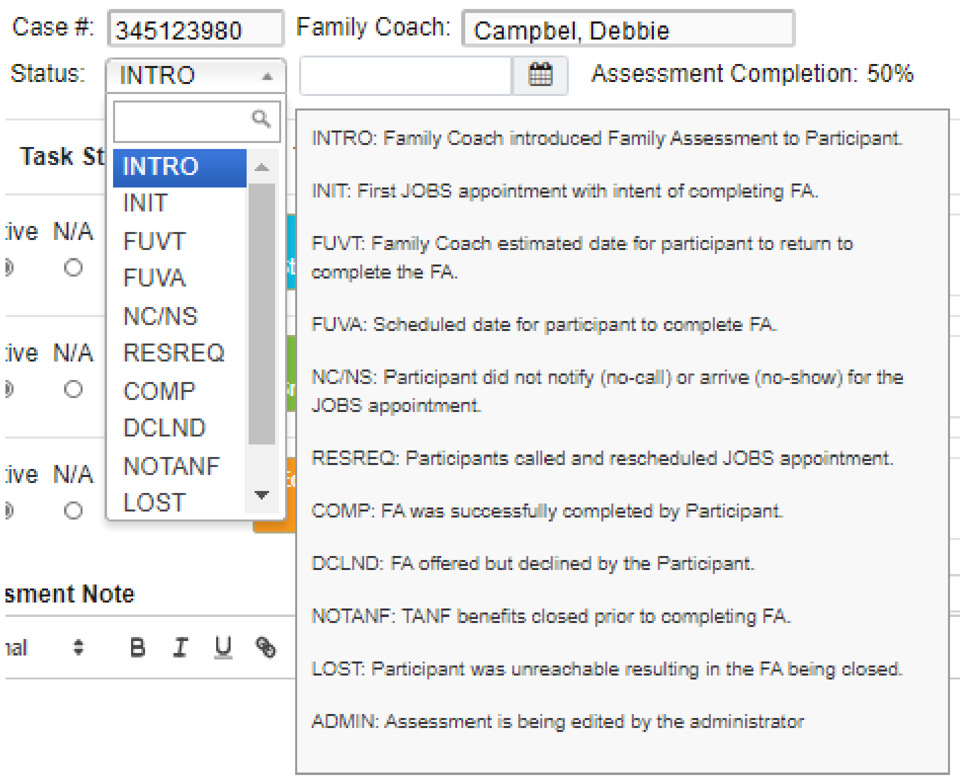
Participant

FACT allows you to switch between multiple participant who are in the same family. The example below shows how you can click on the 'Participant' dropdown and chose one of the two participants to add family assessment results under.



Statuses and Dates

The purpose of the family assessment statuses is to track the lifecycle of the record from creation to resolution. This will assist greatly with both identifying the current state of a given family assessment and reporting.



Introduction – INTRO status and date must be added to all new Family Assessment results. This gives a starting date for the Family Assessment.

The Family Assessment is introduced to the participant by the Family Coach or Engagement Specialist. For new TANF participants this will normally take place during the Warm Hand Off (WHO). For ongoing TANF participants the introduction will most likely coincide with the JOBS appointment used to offer the Family Assessment.

Enter the date the Family Assessment was introduced during WHO or the date of the JOBS appointment if WHO was not used.

Family Assessment Collection Tool (FACT)

Initial Visit – INIT status and date must be added to all new Family Assessment results.

The INIT is used to capture the date of the JOBS appointment used to conduct the Family Assessment. For new TANF participants this is usually the first JOBS appointment after the WHO. For ongoing TANF participants the INIT would be the JOBS appointment used to conduct the Family Assessment.

Enter the date of the JOBS appointment used to conduct the Family Assessment.

Follow-up Visit Tentative – FUVT status is not required for new Family Assessment results. Only used if needed.

FAVT is used to capture a tentative JOBS appointment to complete the Family Assessment when an actual appointment has not been scheduled. FAVT would most likely be used in branches where the Family Coach does not schedule their own appointments.

Enter an estimated date for the upcoming JOBS appointment. This does not have to be the actual date.

Follow-up Visit Actual – FUVA status is not required for new Family Assessment results. Only used if needed.

FUVA is used to capture an actual follow up JOBS appointment, which would be used to complete the Family Assessment.

Enter the actual date of the JOBS appointment used to complete the Family Assessment.

No Call / No Show – NC/NS status is not required for new Family Assessment results. Only used if needed.

NC/NS is used to indicate a participant missed the JOBS appointment, which was scheduled to conduct the Family Assessment and did not call to cancel. If the participant contacts the department to reschedule, do not use this status.

Enter the date of the missed JOBS appointment.

Reschedule Requested – RESREQ status is not required for new Family Assessment results. Only used if needed.

RESREQ is used when the participant contacts the department to reschedule the JOBS appointment to conduct the Family Assessment. This status could be used after the INIT or FUVT.

Enter the date the participant contacted the department to reschedule the JOBS appointment.

Completed – COMP status is one of the four statuses that indicate a Family Assessment has ended.

COMP is used when all tasks (results: Strengths, Snapshot, and Goal Plan) of the Family Assessment have been finished and results have been entered in FACT.

A finished result would be where the participant provided responses, declined to respond or the task was not applicable.

Enter the date the Family Assessment was completed.

Closed Declined – DCLND status is one of the four statuses that indicate a Family Assessment has ended.

DCLND is used when the participant declined the entire Family Assessment. Keep in mind the participant could decline parts of the Family Assessment however in that situation DCLND would not be used.

Enter the date the participant verbally or in writing declined to participant in the Family Assessment.

Family Assessment Collection Tool (FACT)

Closed No TANF – NOTANF status is one of the four statuses that indicate a Family Assessment has ended.

NOTANF is automatically applied to cases when the Family Assessment (FA) had been started but the participant's TANF case had closed before completion of the Family Assessment. When the case is closed in ONE, ONE will send this information to TRACS overnight. The next day TRACS will show the case as closed. Overnight FACT will receive information from TRACS indicating the case is not closed and change the status of the FA results to NOTANF.

Closed Lost-contact – LOST status is one of the four statuses that indicate a Family Assessment has ended.

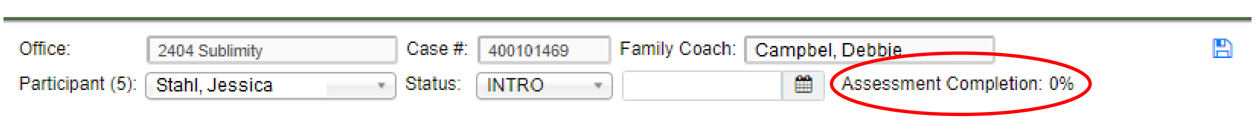
LOST is used when the Family Assessment had been started but the participant has lost contact with the department. LOST can be used to close out the current Family Assessment.

Enter the date for when the Family Assessment has been declared LOST.

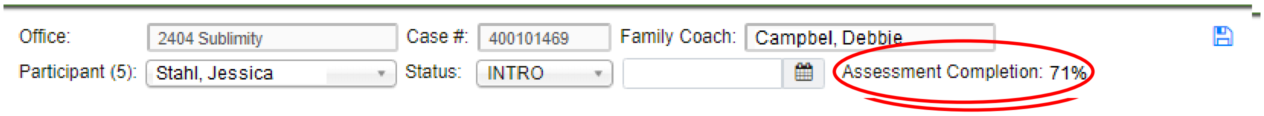
Administration – ADMIN is used only by FACT administrators to reset a closed assessment in order to make corrections to the Family Assessment results. Only an administrator can use the ADMIN status.

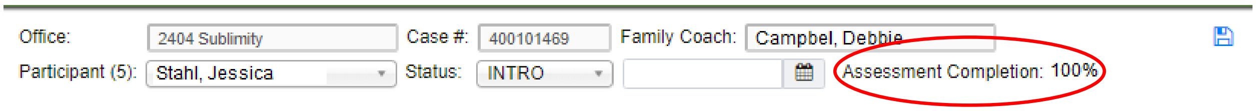
Assessment Completion Indicator

The Assessment Completion Indicator provides a user a quick view of the progress of entering family assessment results. As tasks results are entered, the percentage of completion will move up to 100%.



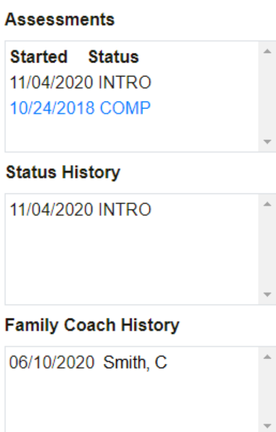
Family Assessment Collection Tool (FACT)





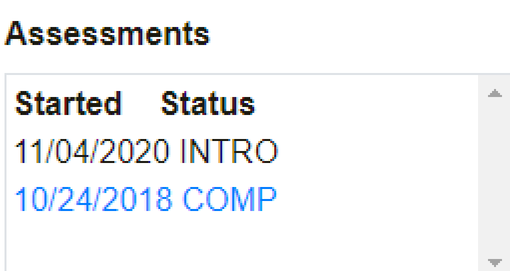
Family Assessment Sidebar

The ‘Sidebar’ provides the status of the current family assessment results and a look at historical information.



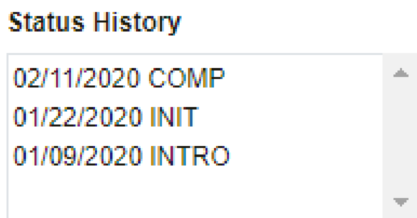
Assessments

Assessments show current and past assessment results. As you can see below the current assessment was opened on 11/04/2020 and is in the Introduction stage. There is also a past assessment, which was completed on 10/24/2018.



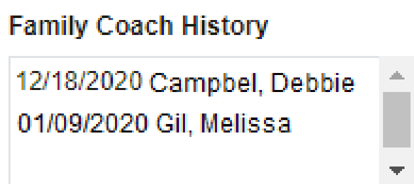
Status History

The Status History shows the status or statuses of a selected assessment. In the example below the Family Assessment was introduced on 01/09/2020. The initial JOBS appointment was on 01/22/2020 and the family assessment results were completed on 02/11/2020.



Family Coach History

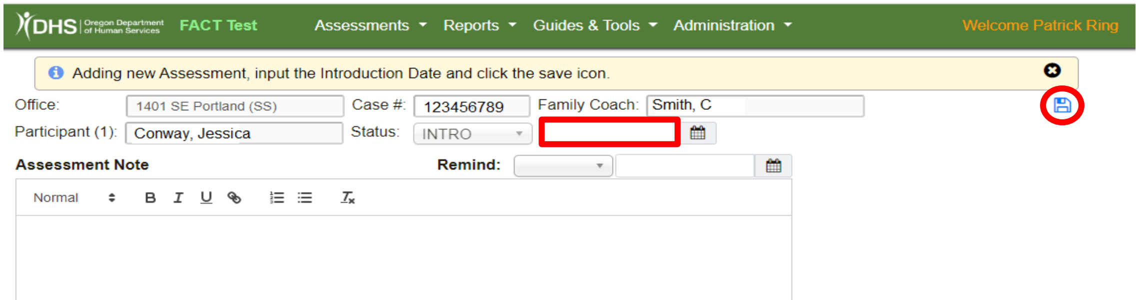
The Family Coach History will show, which family coaches initiated an assessment in the past. As you can see below Melissa Gil initiated the assessment results from 01/09/2020 and Debbie Campbel on 12/18/2020.



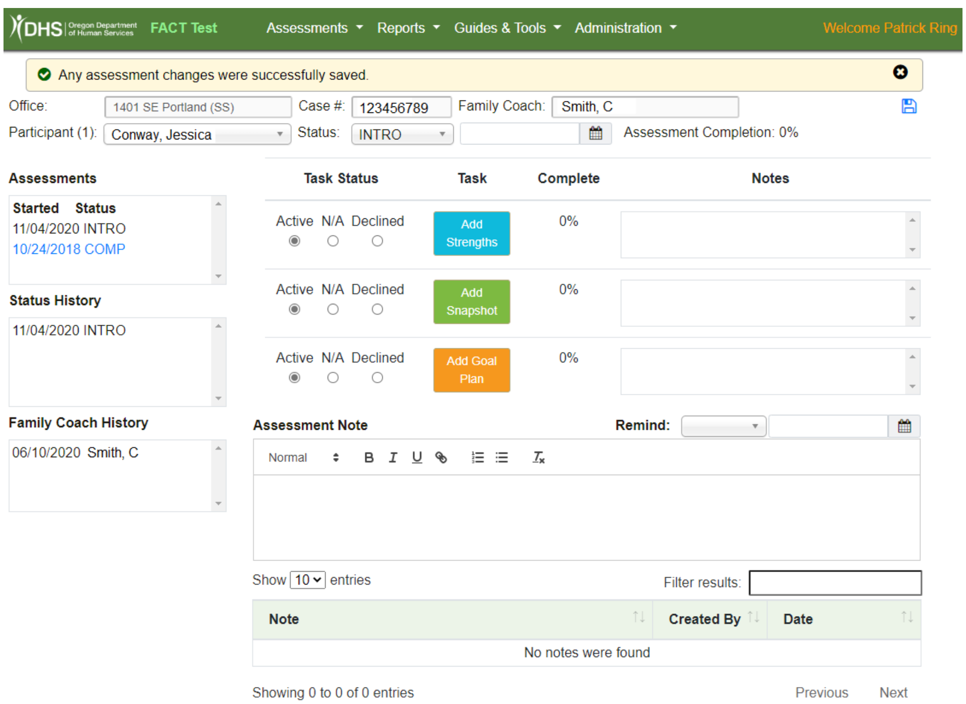
Adding New Family Assessment Results

To add the results of a new family assessment, the user will first need to input an introduction (INTRO) date in the field outlined in red.

Family Assessment Collection Tool (FACT)



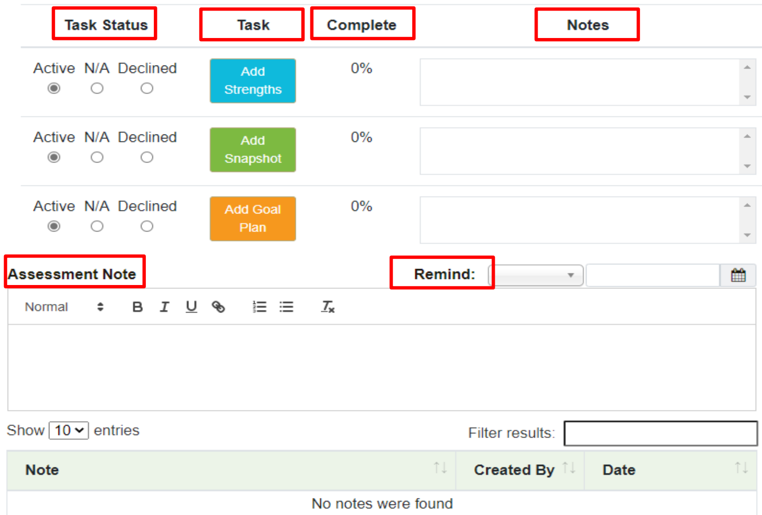
Once the user clicks on the 'Save' icon, the image below will appear. The assessment record is now ready for the results to be added.



Summary View

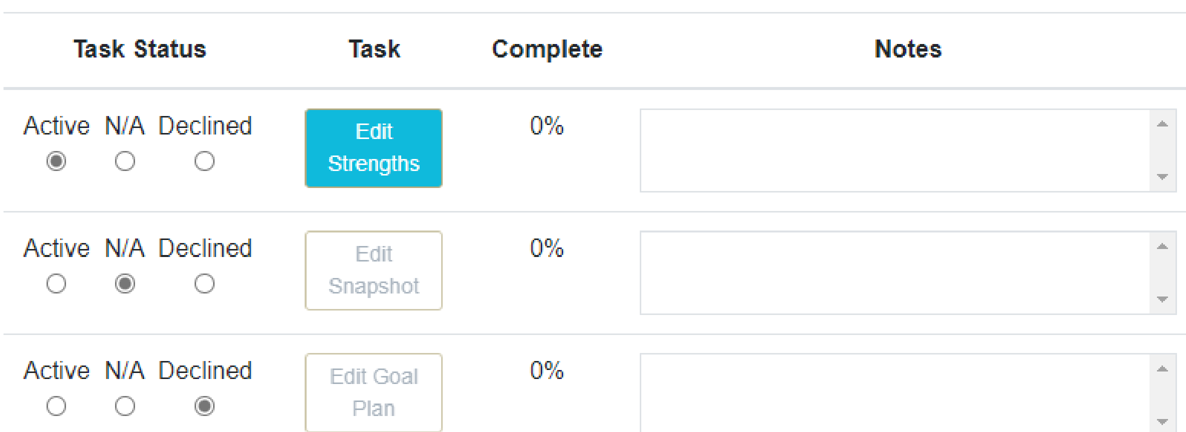
From the "Summary View" a user can: select the status of a "Task"; enter a specific "Task"; see the percent completion of each task; whether or not there are notes; and set reminders.

Family Assessment Collection Tool (FACT)



Task Status and Tasks

The ‘Task Status’ is used to indicate whether the participant has chosen to respond to specific sections of the Family Assessment or if a particular task was ‘Not Applicable’ (N/A) or if the participant ‘Declined’ a specific section or sections.



In order to enter results of a particular task, the ‘Active’ status must be selected. If ‘N/A’ or ‘Declined’ are selected, the task will be grayed out and unavailable. See ‘Edit Snapshot’ and ‘Edit Goal Plan’ in the image above.

Completion Percentage

Family Assessment Collection Tool (FACT)

The ‘Completion Percentage’ indicates how much of the results have been entered. As you see below 71% of the “Snapshot” results has been entered.

Task Status	Task	Complete	Notes
Active N/A Declined	Add Strengths	0%	
Active N/A Declined	Edit Snapshot	71%	
Active N/A Declined	Add Goal Plan	0%	

Comments, Task Notes and Assessment Notes

There are three levels of notes, which can be added to FACT. Each has a purpose related to the overall family assessment.

Before moving on, let’s discuss types of information that ***would not*** be added to comments, task notes or assessment notes.

<u>Diagnosis, Prognosis or Treatment Information</u>

Disability information was not intended to be captured in FACT. FACT does capture the results of questions regarding emotional and physical health as well as substance use however specific information would not be entered into FACT.

The TRACS Disability and Accommodation page is the appropriate location for diagnosis, prognosis, and treatment information. Even when this information is self-disclosed.

If the participant discusses disabilities or the need for accommodation you could include a comment of note in FACT pointing to TRACS. For example:

See TRACS Disability page for additional information.

It would be appropriate to say we are working with the participant to gather information or additional information if needed. You could add a comment or notes stating:

Will be working with Patrick to gather information regarding his physical health issues.

If you are unsure of the information you want to add to a comment or note, please reach out to your lead worker, or send a question to TANF Policy.

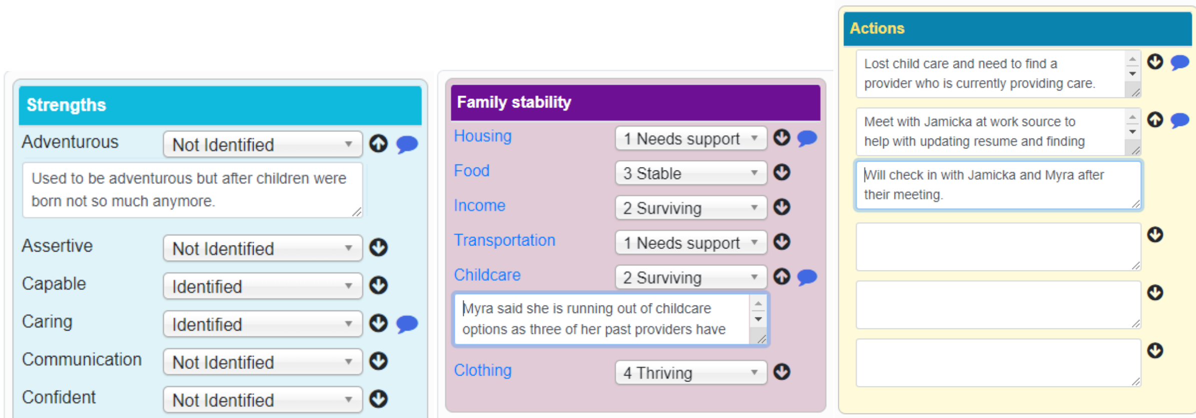
Domestic Violence

For information pertaining to a survivor's JOBS case plan and domestic violence, use TRACS narratives. The below guidance is for JOBS case plan domestic violence narration in TRACS. It does NOT apply to TA-DVS or eligibility related items, that should be kept in the respective program(s) case notes in ONE.

- Only capture details needed that pertain to the JOBS case plan.
- Do not narrate the details of the abuse. Narrating the type of abuse (physical, emotional, financial, etc.) is appropriate, but specific actions should not be narrated.
- Include any resources that were offered (National DV hotline, local DVSA agency, TA-DVS, etc.)
- Do not secure or restrict DV narratives. The hard file process should be followed, if there is a safety concern meeting hard file criteria.
- If CW or APS hotline call is made, narrate that piece without including specifics of the report. Example: "Hotline report made." A report is not always needed for DV situations; only if the reported information requires a mandatory report.

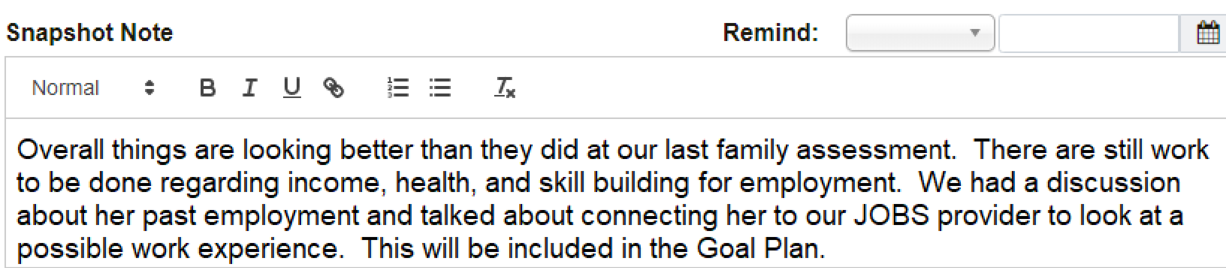
Comments

Comments are used to add a quick note to a specific response within each of the 'Assessment Tasks'. As you can see below, the user has added comments to the Strengths, Snapshot and Goal Plan tasks. You will also notice the blue 'call out bubble' to the right of the response. This indicates there is a comment connected to a particular response. See 'Caring', 'Housing' and the "Lost childcare…" 'Actions'. To view a comment simply click on the down arrow to open the comment.



Task Notes

Each of the three tasks (Strengths, Snapshot and Goal Plan) allows a user to add notes and reminders. Task notes are intended to capture information directly related to the specific task. Below is an example of notes for the Snapshot task.

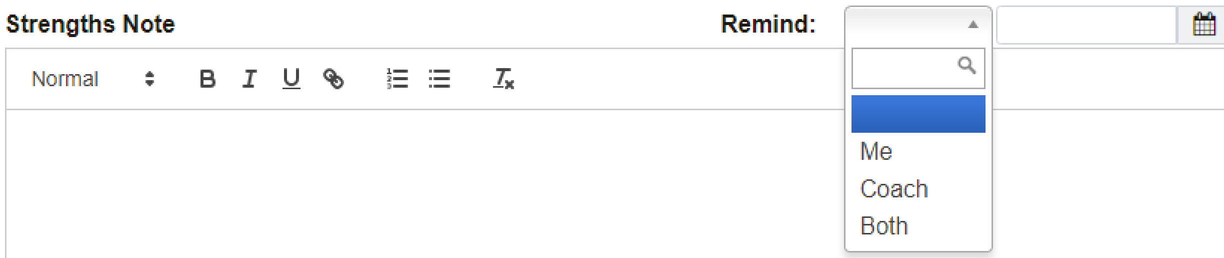


Reminders play an important role in family engagement. They allow a user to create a note, which will appear on their dashboard and help recall important information or task.

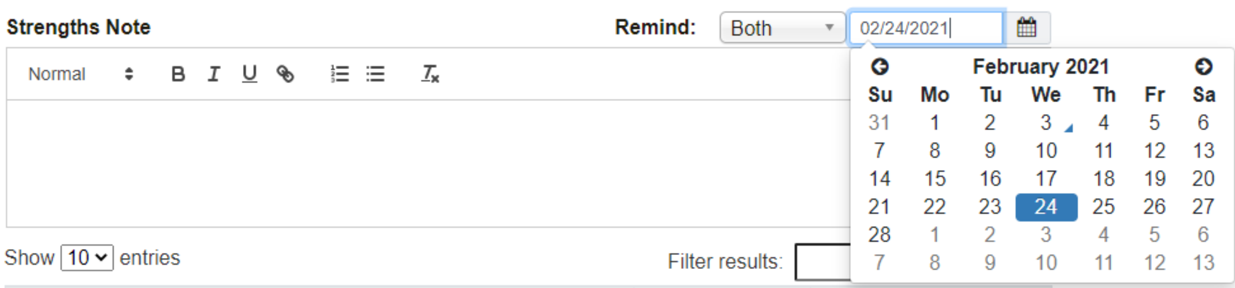
Creating a reminder is a four-step process.

Family Assessment Collection Tool (FACT)

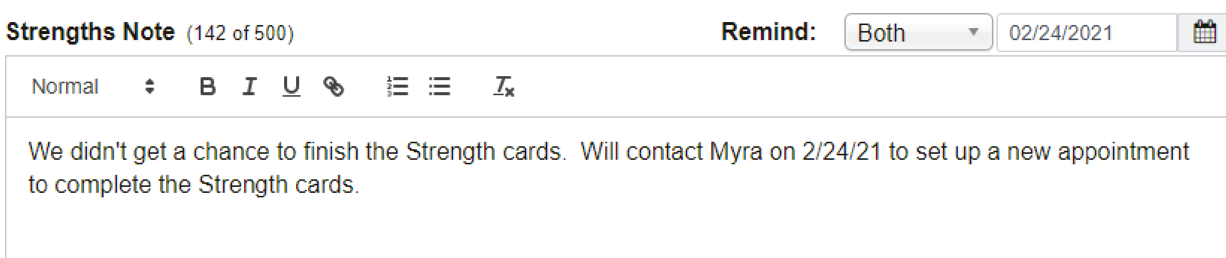
Step 1 – Choose who receives the reminder.



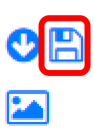
Step 2 – Add an end date for the reminder.



Step 3 – Add information in the notes section.

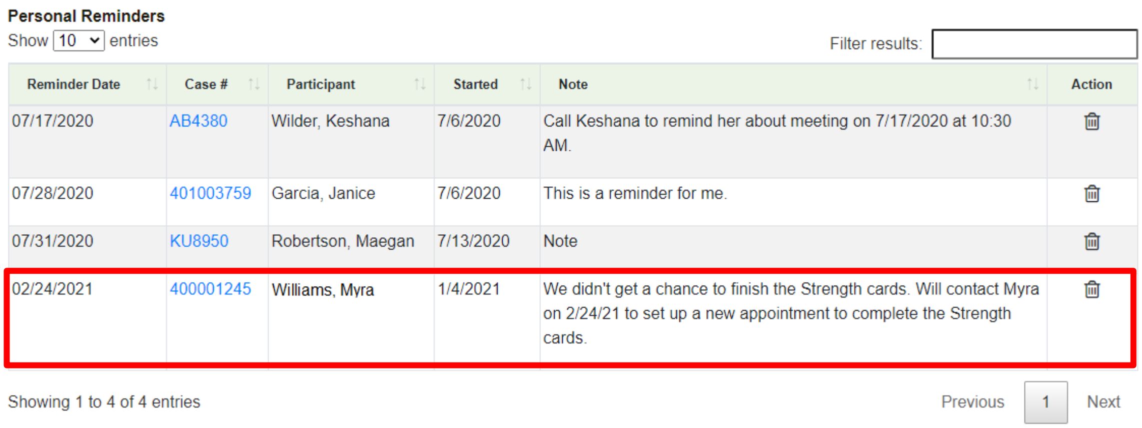


Step 4 – Safe the note. Click the <Save> icon at the top right of the page.



Once a reminder is saved it will appear on the dashboard.

Family Assessment Collection Tool (FACT)



Personal Reminders

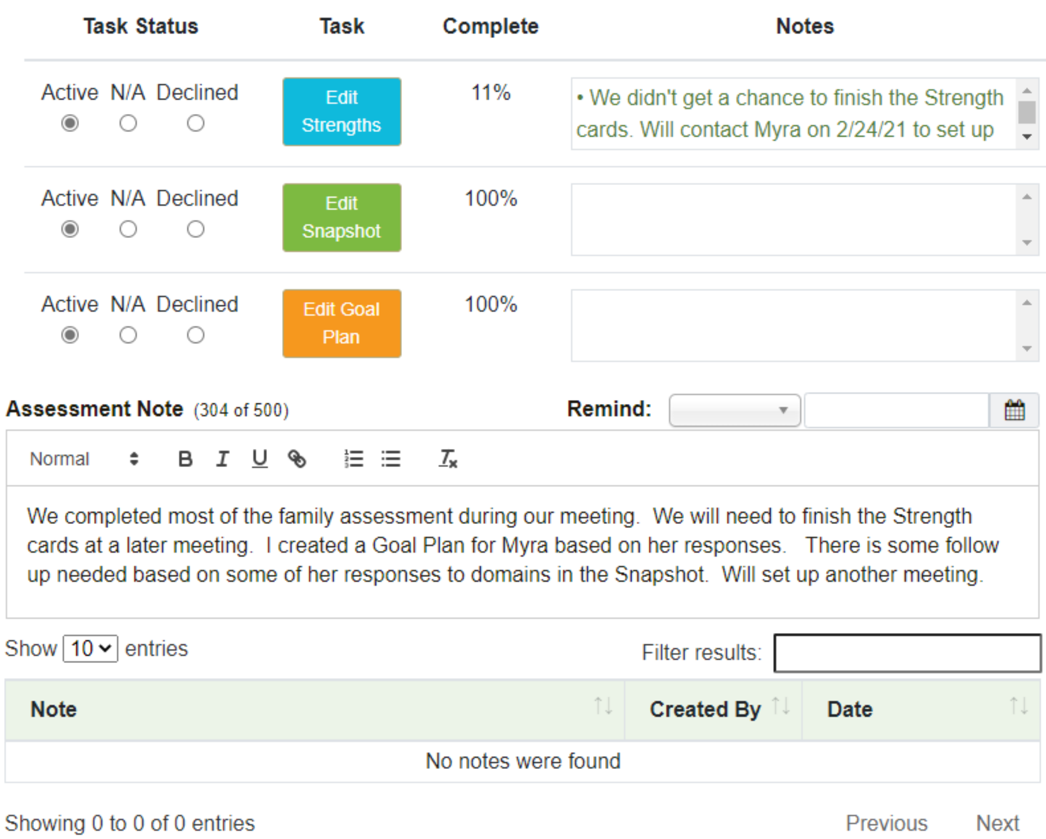
Show 10 entries Filter results:

Reminder Date	Case #	Participant	Started	Note	Action
07/17/2020	AB4380	Wilder, Keshana	7/6/2020	Call Keshana to remind her about meeting on 7/17/2020 at 10:30 AM.	
07/28/2020	401003759	Garcia, Janice	7/6/2020	This is a reminder for me.	
07/31/2020	KU8950	Robertson, Maegan	7/13/2020	Note	
02/24/2021	400001245	Williams, Myra	1/4/2021	We didn't get a chance to finish the Strength cards. Will contact Myra on 2/24/21 to set up a new appointment to complete the Strength cards.	

Showing 1 to 4 of 4 entries Previous 1 Next

Assessment Notes

Assessment notes are added to the Summary View. Unlike the Task notes, which a directly related to a Task, the Assessment notes are direclty related to the overall family assessment. Below you can see the Assessment notes as well as the notes connected to the Strengths task.



Task Status	Task	Complete	Notes
Active N/A Declined	Edit Strengths	11%	• We didn't get a chance to finish the Strength cards. Will contact Myra on 2/24/21 to set up
Active N/A Declined	Edit Snapshot	100%	
Active N/A Declined	Edit Goal Plan	100%	

Assessment Note (304 of 500) **Remind:**

Normal

We completed most of the family assessment during our meeting. We will need to finish the Strength cards at a later meeting. I created a Goal Plan for Myra based on her responses. There is some follow up needed based on some of her responses to domains in the Snapshot. Will set up another meeting.

Show 10 entries Filter results:

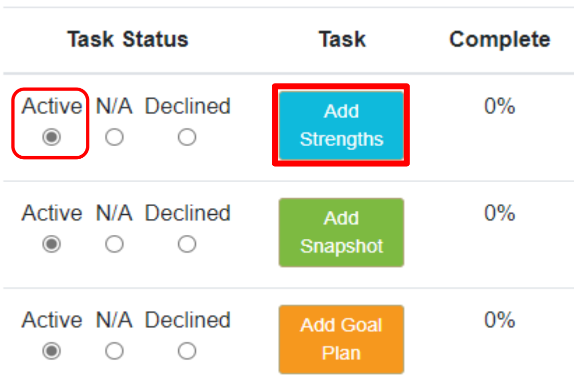
Note	Created By	Date
No notes were found		

Showing 0 to 0 of 0 entries Previous Next

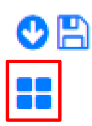
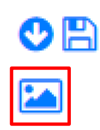
Family Assessment Collection Tool (FACT)

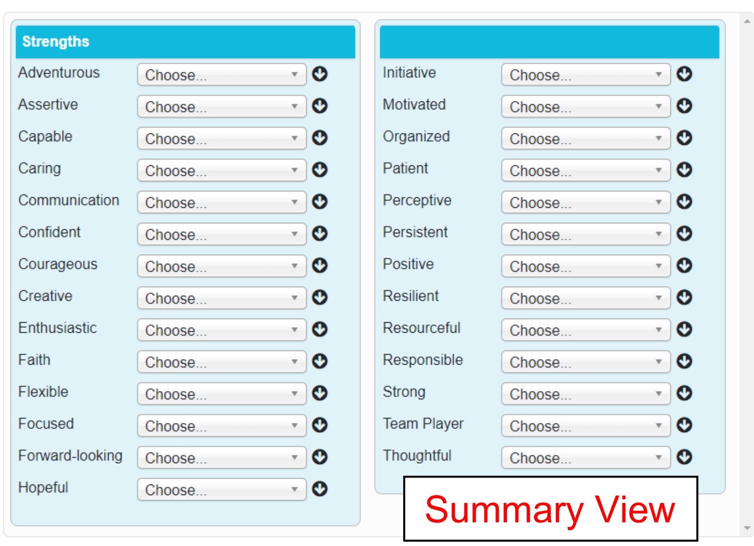
Strength Task

To add results of the Strength cards the user will need to make sure the Task Status is set as ‘Active’ and then click <Add Strengths>.

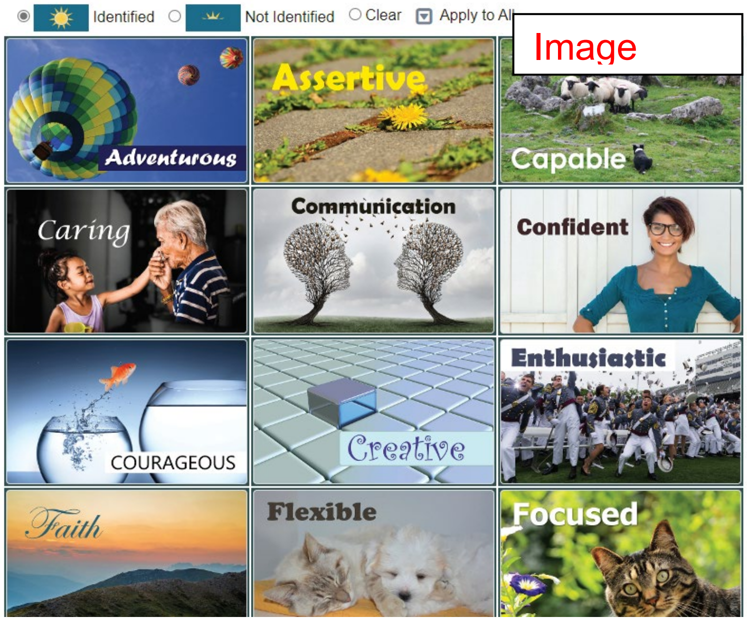


After clicking on ‘Add Strengths’ one of two views, Summary, or Image, will appear. Which one appears would be dependent upon the user’s default setting. You can switch between view by using the Summary or Image buttons located at the top left of the screen. To switch between views, a user would click on:

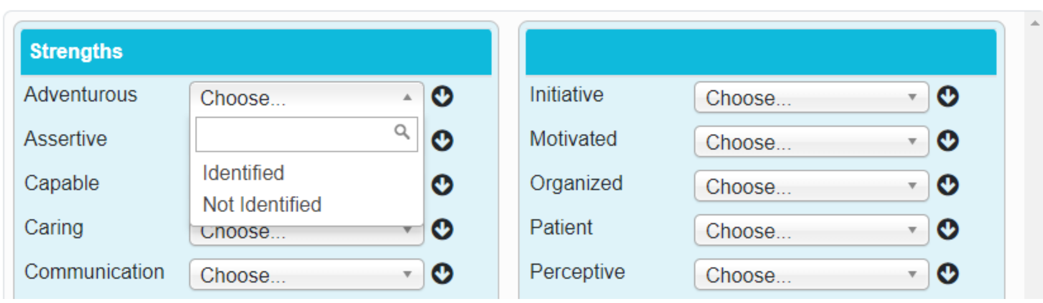
Summary view  Image view 



Family Assessment Collection Tool (FACT)



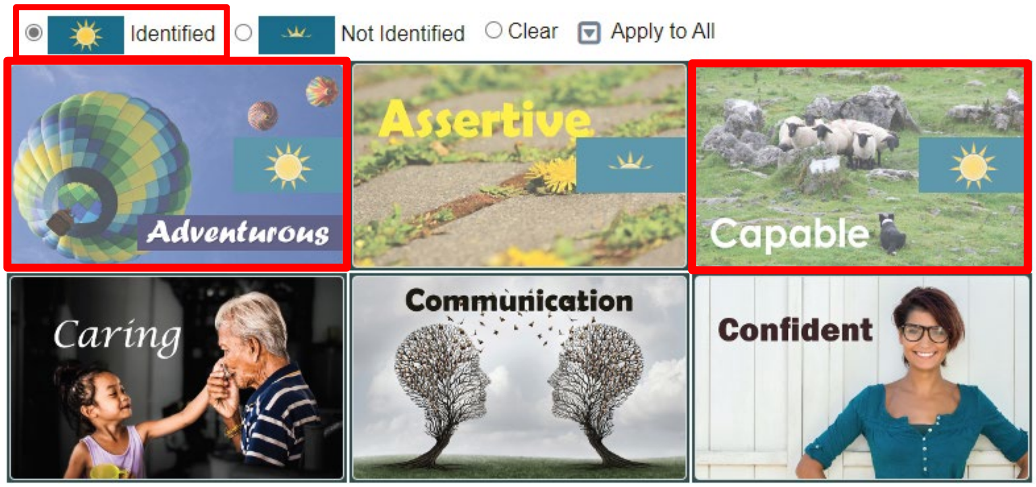
To enter the Strength task results using the Summary View, click on the dropdown for the specific strength and make a choice between ‘Identified’ and ‘Not Identified’.



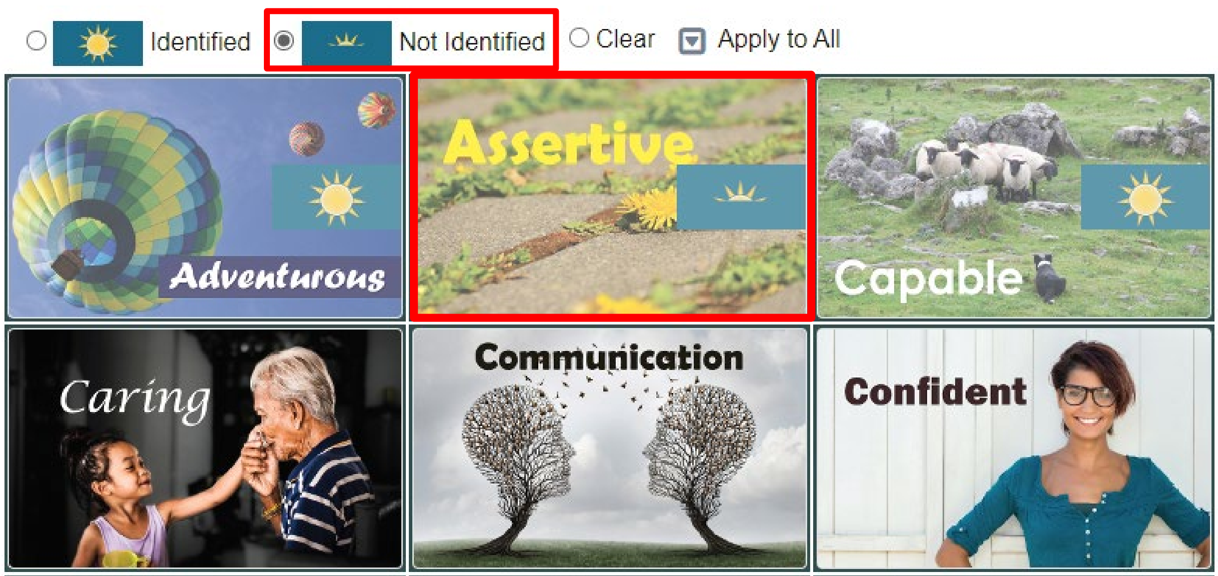
When using the Image view, a user selects the response from the response list then click on the appropriate images.

When selecting ‘Identified’ strengths click on the radial button for ‘Identified’ then select the image. See Adventurous and Capable below.

Family Assessment Collection Tool (FACT)

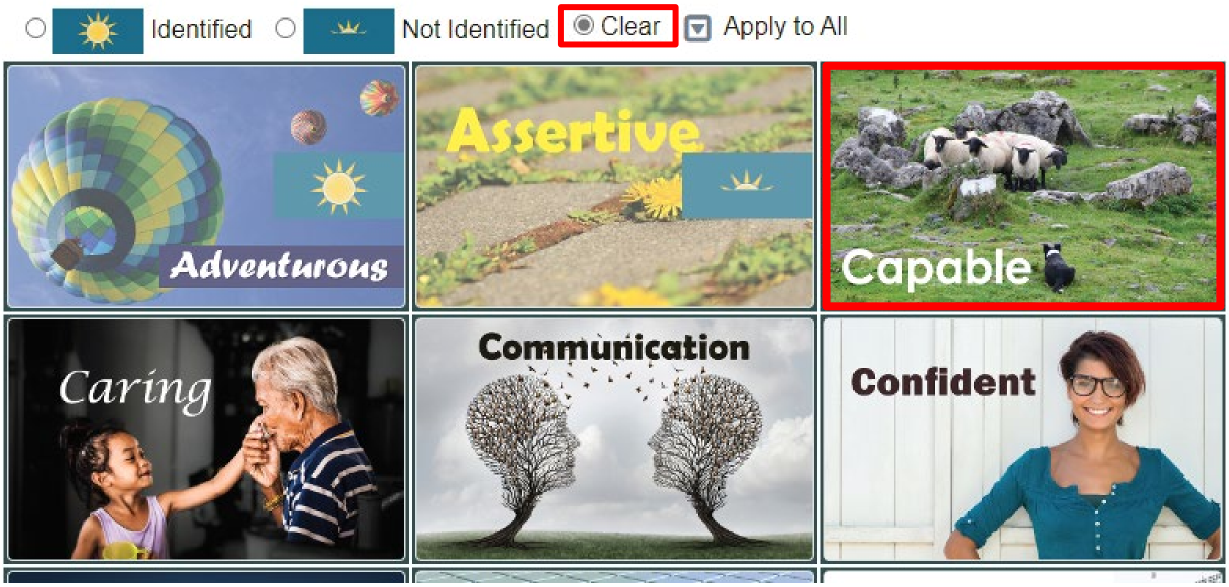


To indicating a strength was not identified, select the ‘Not Identified’ radial button and then click on the image. See “Assertive” below.



Using the ‘Clear’ selection will allow a user to clear out a previous selection. For example, you may have chosen ‘Identified’ for “Capable” however the participant didn’t make that selection. You would click on the ‘Clear’ radial button and then click on the “Capable” image. See below as the previous selection is now cleared.

Family Assessment Collection Tool (FACT)



If a participant chose ‘Identified’ or ‘Not Identified’ for the majority of cards you can click on the appropriate response, then click <Apply to All>. This will mark all cards with that response.

In the image below, ‘Identified’ was the majority. Selecting ‘Apply to All’ will apply that selection to all cards. Once that is done, the user can then go in and change cards to ‘Not Identified’ by choosing the ‘Not Identified’ radial button then selecting the appropriate cards.

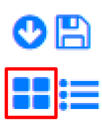
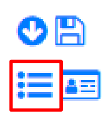
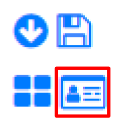
Family Assessment Collection Tool (FACT)

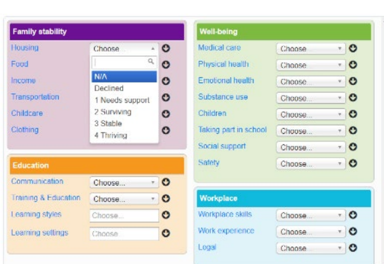
Snapshot Task

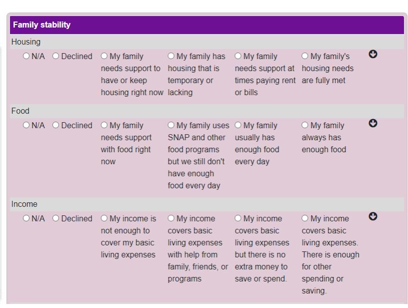
To add results of the Snapshot (Domains) the user will need to make sure the Task Status is set as 'Active' and then click <Add Snapshot>.

Task Status	Task	Complete
Active N/A Declined	Add Strengths	0%
Active N/A Declined	Add Snapshot	0%
Active N/A Declined	Add Goal Plan	0%

After clicking on 'Add Snapshot' the Summary, Detail or Card view will appear. Which one appears would be dependent upon the user's default. Users can also switch between views by using the buttons located at the top left of the screen.

Summary View  Detail View  Card View 



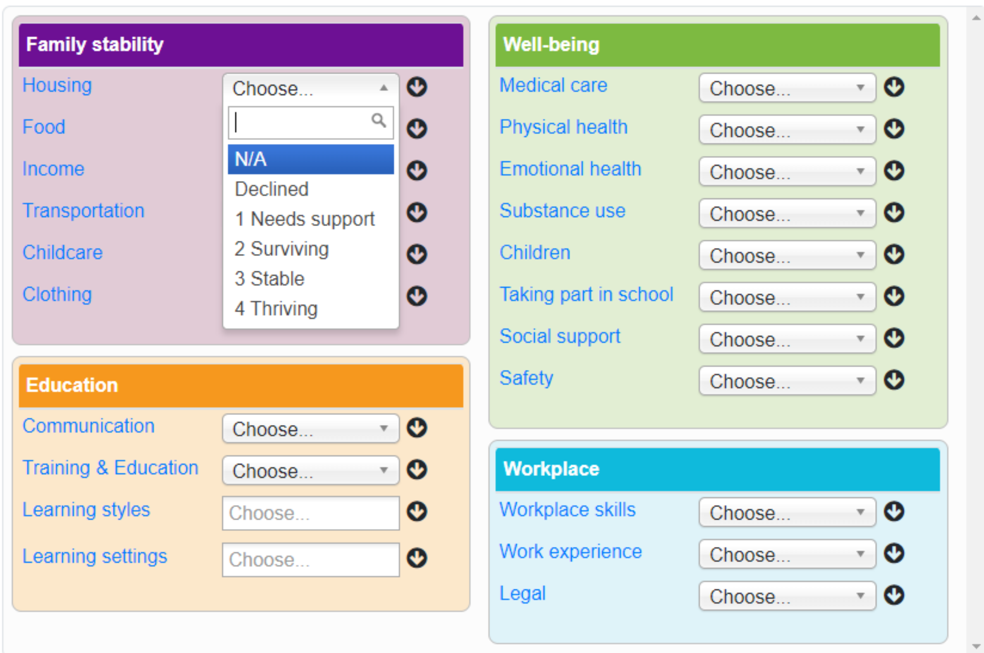


To enter the Snapshot task results using the Summary View, click on the dropdown for the specific domain and select the response the participant provided.

Family Assessment Collection Tool (FACT)

‘N/A’ is used when the domain is not applicable to the participant’s family dynamics. For example, the only children are 15 and 17 years old. The ‘Childcare’ domain would most likely be ‘N/A’. The family may have no children in school. The “Taking part in school” domain would be ‘N/A’.

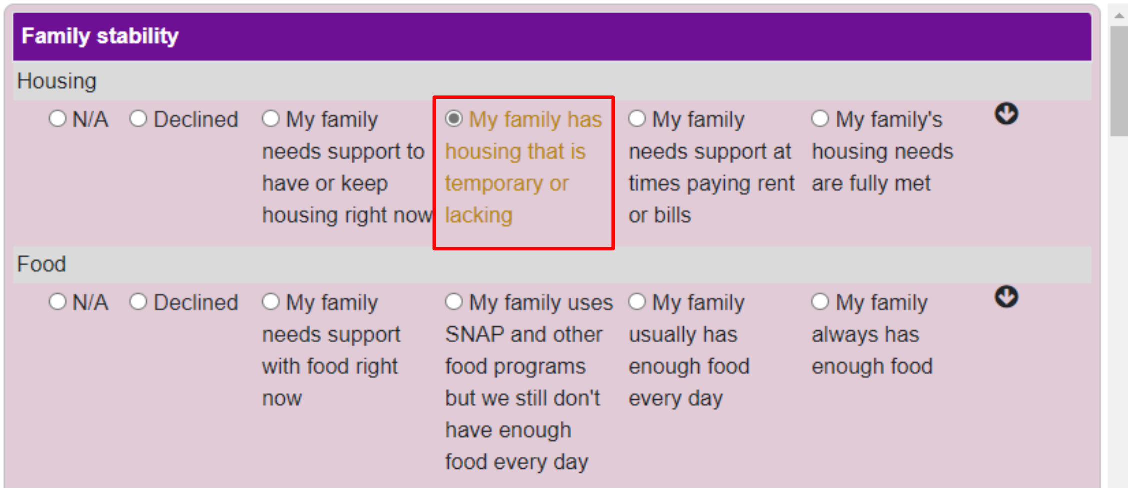
- N/A (Non-Applicable)
- Declined
- Needs Support
- Surviving
- Stable
- Thriving



To enter the Snapshot task results using the Detail View, click on the radial button for the specific domain. The ‘N/A’ and ‘Declined’ responses are still represented however, the other four responses have changed. These responses are taken directly from the Family Assessment and are specific to the domain.

The image below shows that the response under ‘Family stability’, ‘Housing’ domain was “My family has housing that is temporary or lacking”. When selected the radial button will have a gray circle inside and the font color will change.

Family Assessment Collection Tool (FACT)

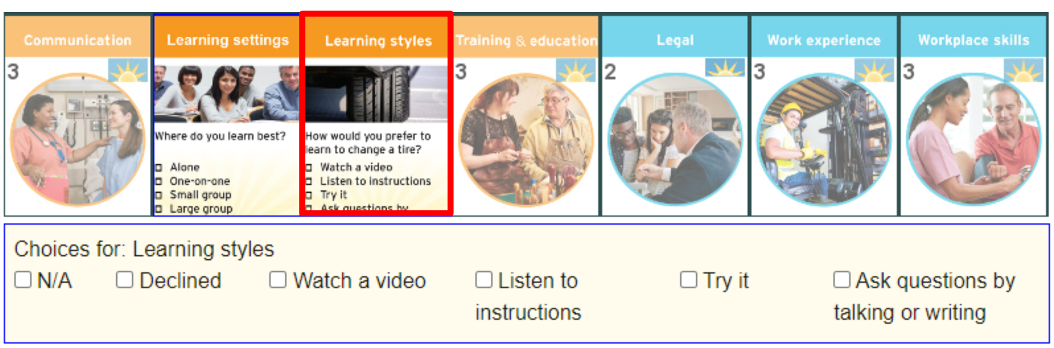


To enter the Snapshot task results using the Card View, click on the radial button associated with the response or responses and click on each card connected to that response. In the image below, the user selected the second sun from the left and then chose the "Clothing" domain. As you can see below the "Clothing" domain card is now opaque and shows a number "2" and the following sun " ".

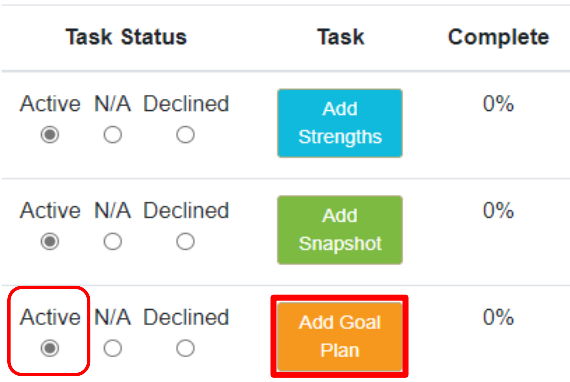
The image below shows a mostly completed entry for the "Snapshot" domains. As you can see there are a variety of results.

Family Assessment Collection Tool (FACT)

The ‘Learning settings’ and ‘Learning styles’ domain results are different from all the others. These two domains can have multiple responses as long as one of the responses is not ‘N/A’ or ‘Declined’.



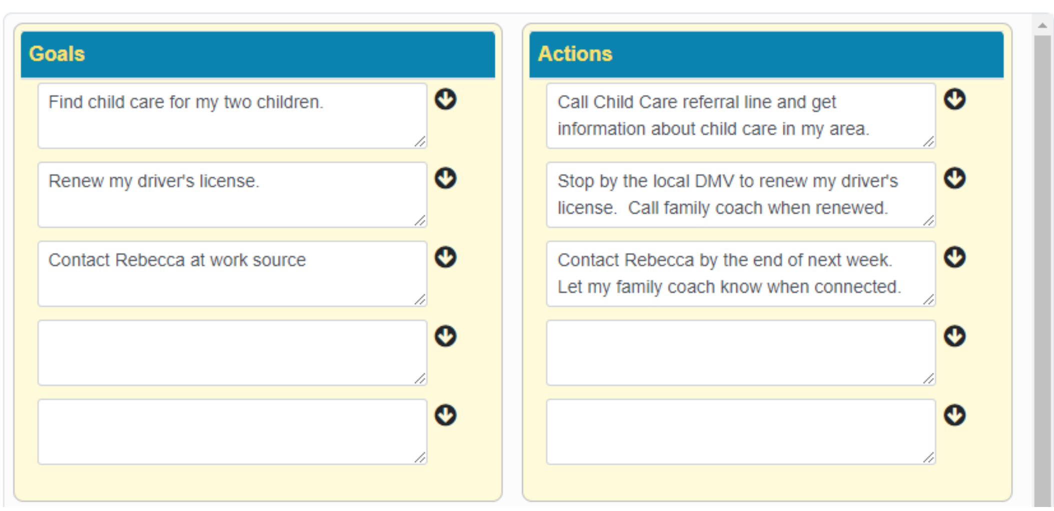
Goal Plan Task



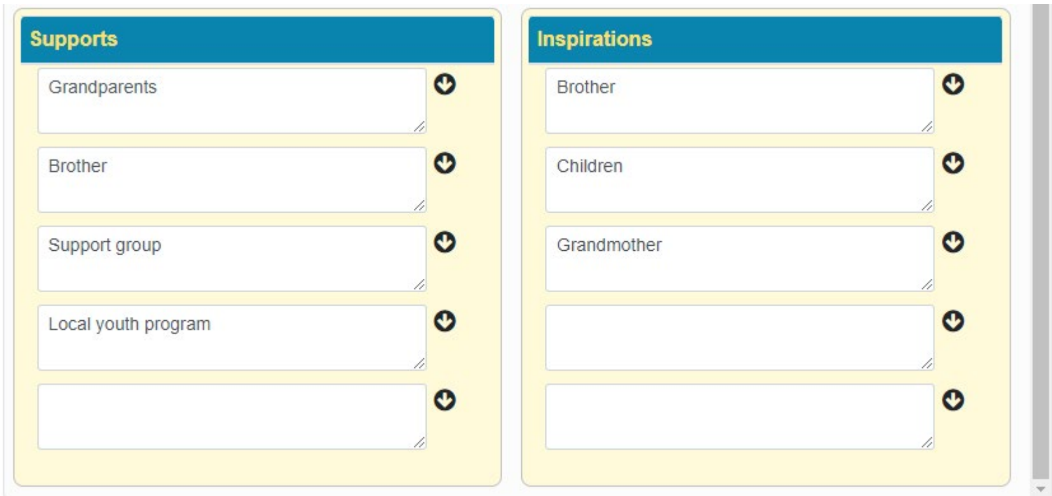
To add results and create a Goal Plan the user will need to make sure the Task Status is set as ‘Active’ and then click <Add Goal Plan>.

The user can now add the participant’s responses to the following:

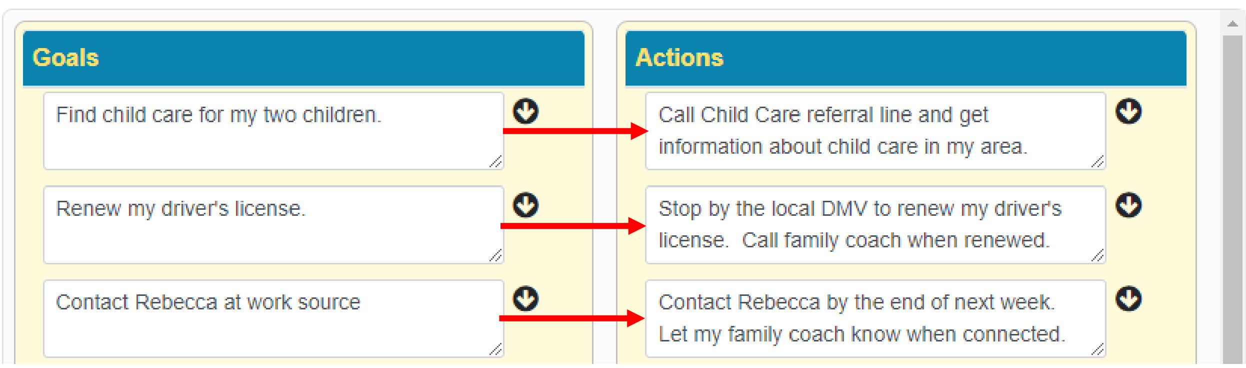
- Goals
- Actions
- Supports
- Inspirations



Family Assessment Collection Tool (FACT)



As seen in the image below, the Family Coach has entered the Goals and Actions, so they line up. This will help when the Goal Plan is printed and/or emailed to the participant.



Creating Reports

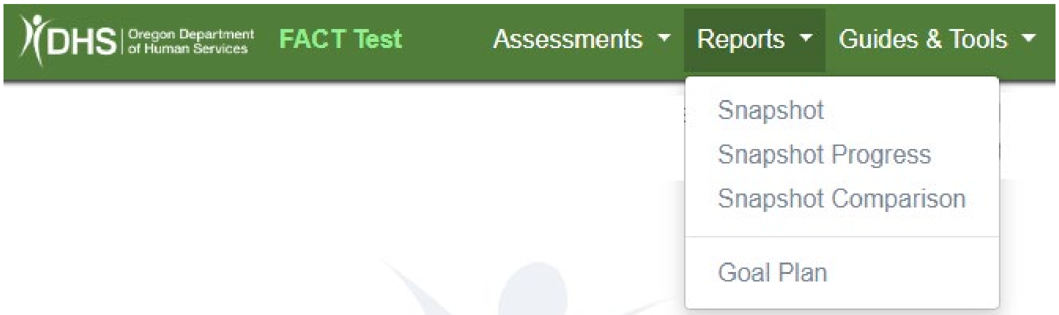
Purpose of the Reports

The Family Assessment Collection Tool (FACT) allows a user to create several basic reports for a participant. The user can also take the results of the Goal Plan and produce a PDF, which can be emailed to the participant or printed handed to or mailed. The reports include:

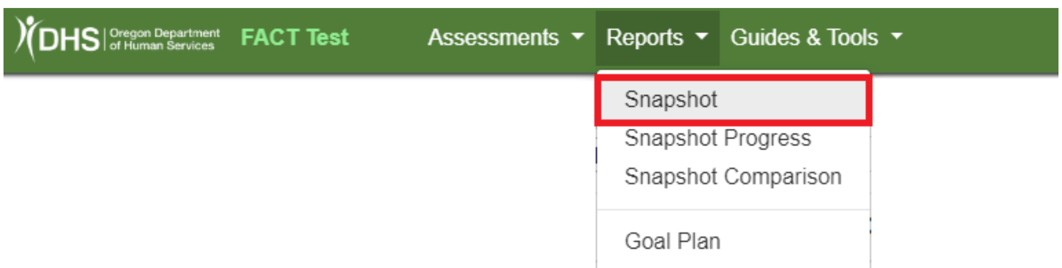
- Snapshot
- Snapshot Progress

Family Assessment Collection Tool (FACT)

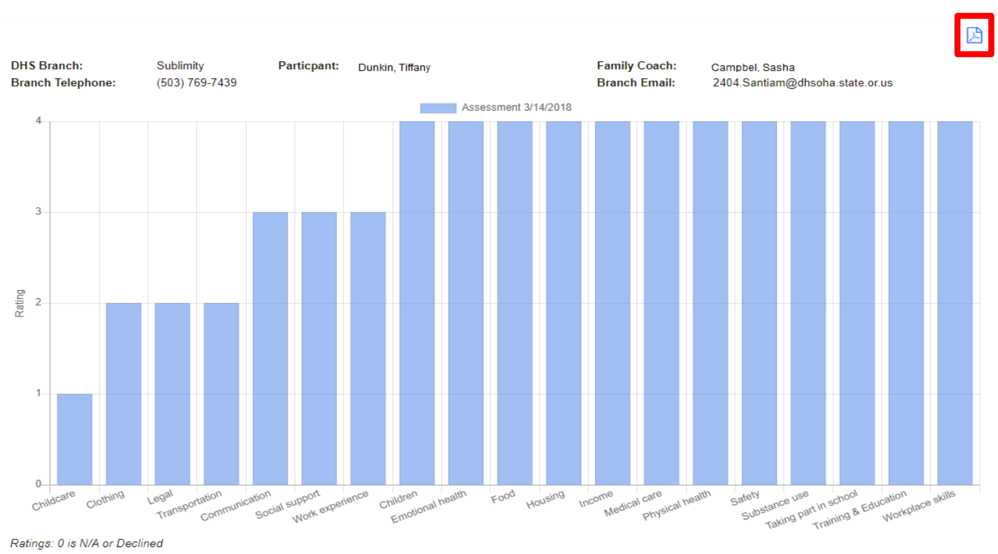
- Snapshot Comparison
- Goal Plan



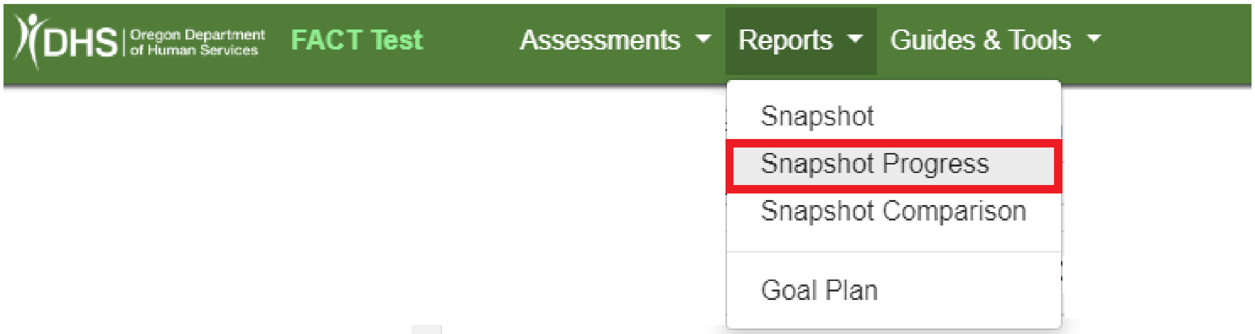
Snapshot



Selecting the 'Snapshot' from the 'Reports' dropdown will bring up a bar chart displaying all of the domains by the score for the most current family assessment. This gives the user and participant a quick view of the selected family assessment results for the Snapshot. The user can also create a PDF by clicking on the PDF button.

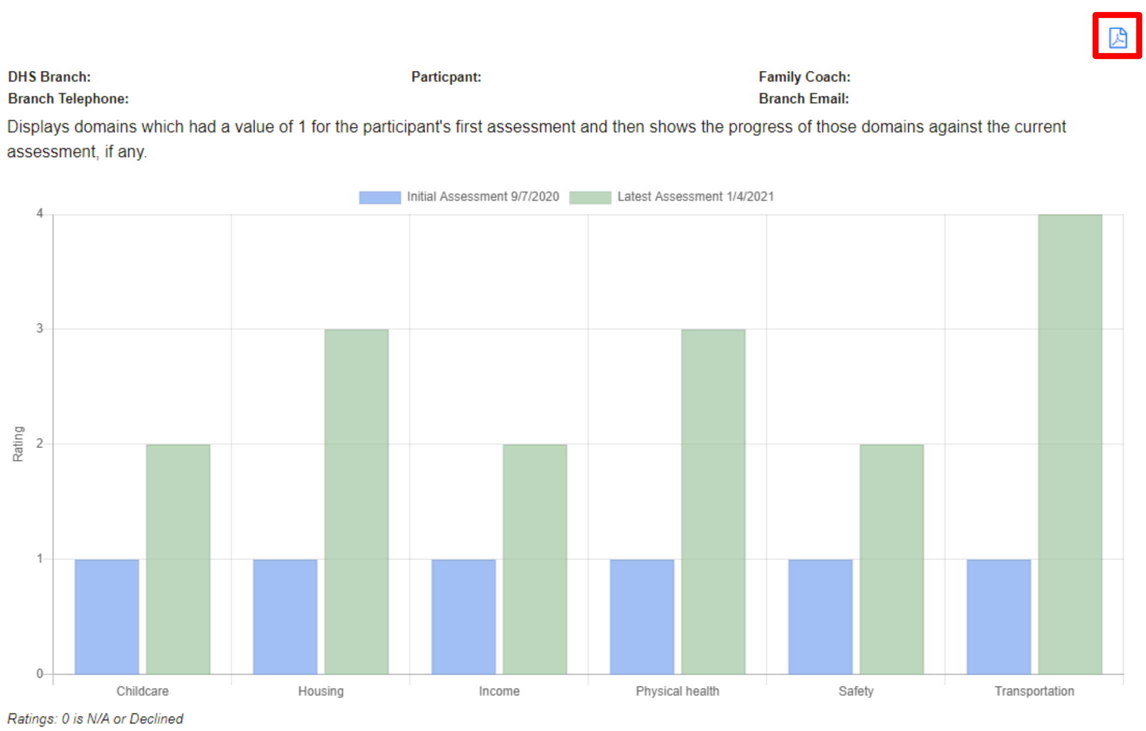


Snapshot Progress



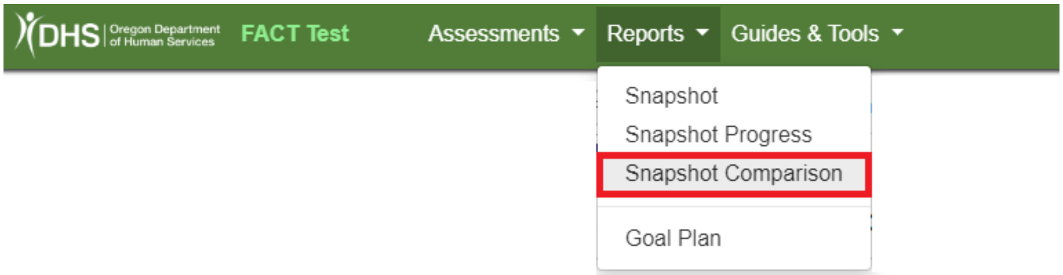
The “Snapshot Progress” report will display the domain results of the initial family assessment, which were equal to ‘Need Support’ and compares those to the most recent ‘Snapshot’ results.

As you see below, Childcare, Housing, Income, Physical health, Safety and Transportation were all at “Needs Support” in September 2020. The bar chart shows the September results compared to the most recent results. Example: Housing was at the level of ‘Needs Support’ in September but now is indicated as ‘Stable’. Clicking on the PDF button will create a PDF.



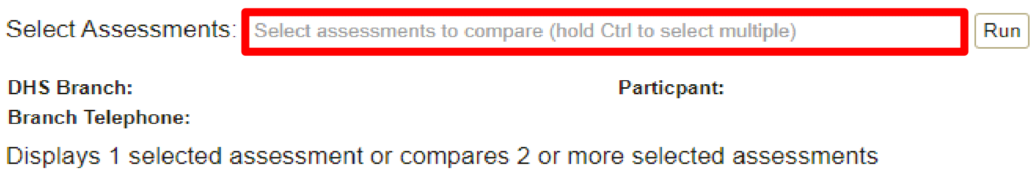
Family Assessment Collection Tool (FACT)

Snapshot Comparison

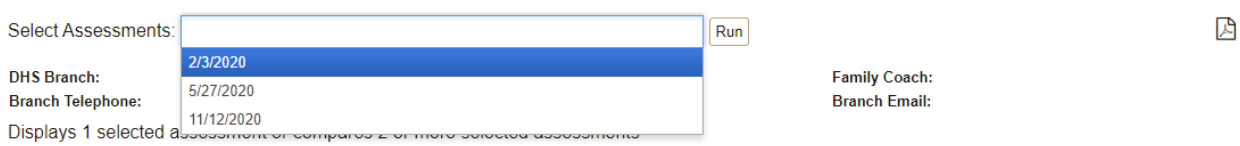


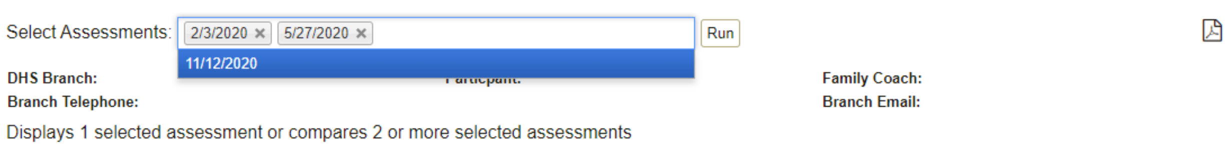
The 'Snapshot Comparison' allows the user to show the domain results of one or more family assessments.

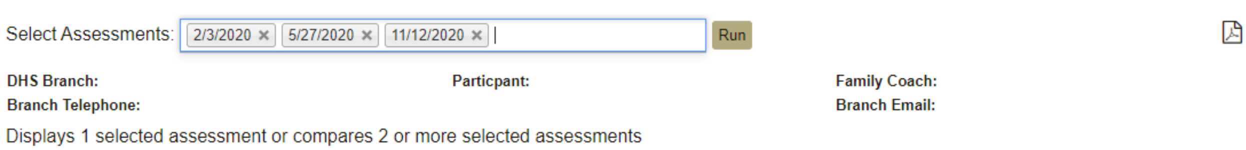
The user will click on the 'Snapshot Comparison' from the 'Reports' dropdown. When the window opens the user will click in the "Select Assessments" box and choose the assessments they want to compare.



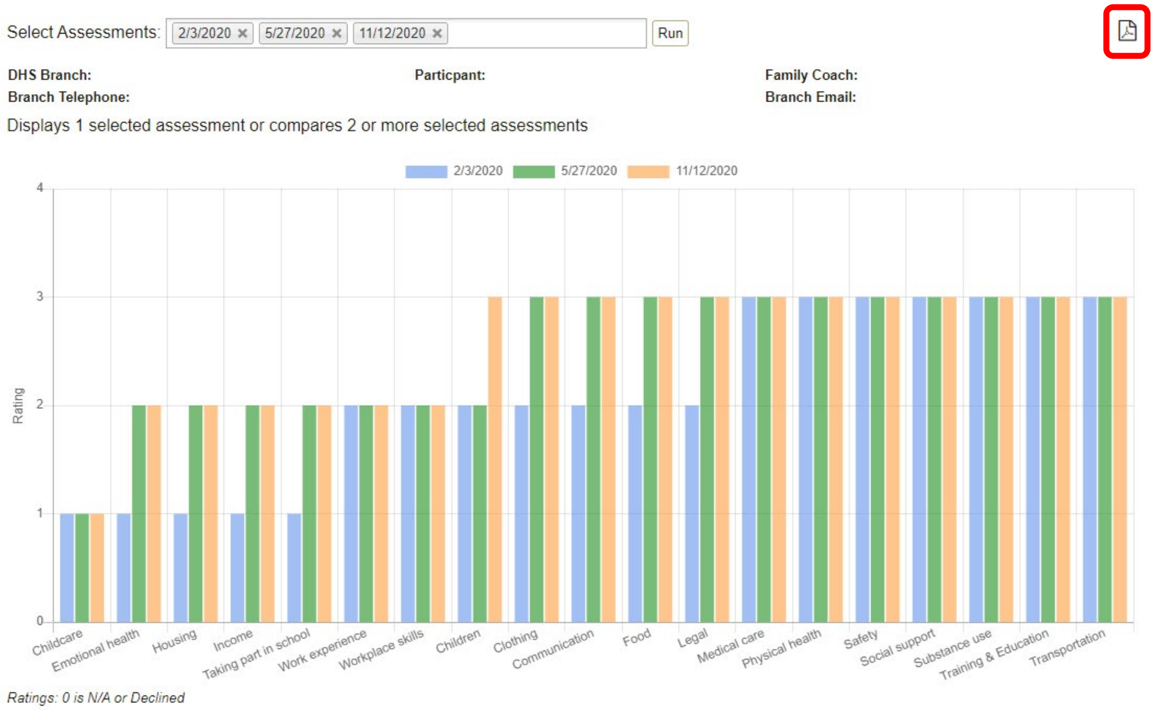
As see in the image below there were three family assessment results enter for this participant. They include 2/3/2020, 5/27/2020 and 11/12/2020. You can choose one, two or all three to compare. In this example all three will be chosen. Once selected click on <Run>.







Family Assessment Collection Tool (FACT)

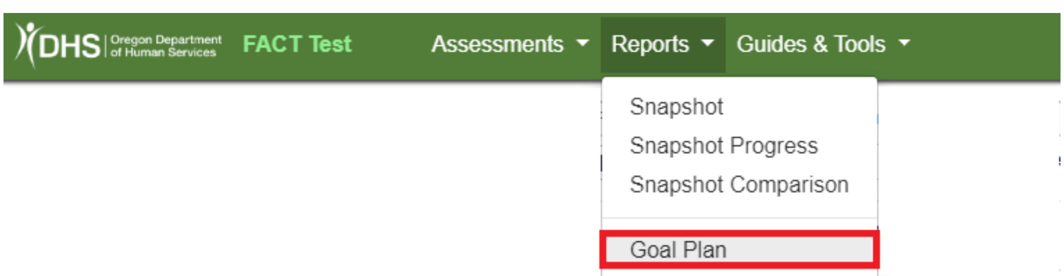


As you can see above the chart displays the results of each domain for all three of the past family assessments. Clicking on the PDF button will create a PDF.

Goal Plan

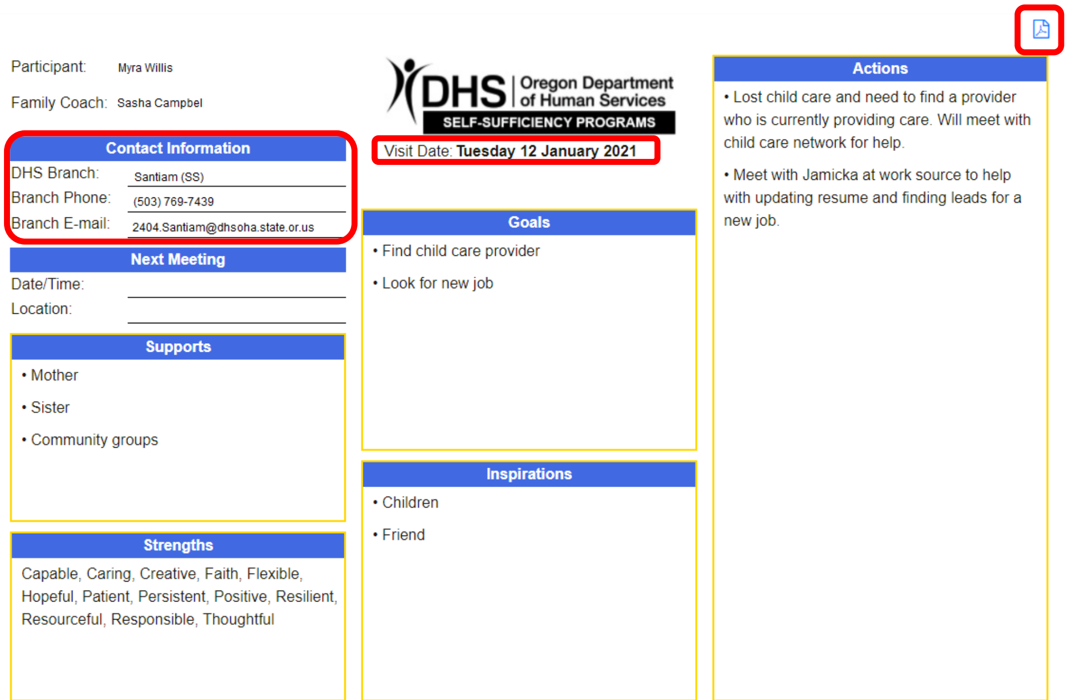
The ‘Goal Plan’ allows a user to take the information for the ‘Strengths’ and ‘Goal Plan’ tasks and combine them into a report for the participant.

Click on <Reports> and then <Goal Plan>.



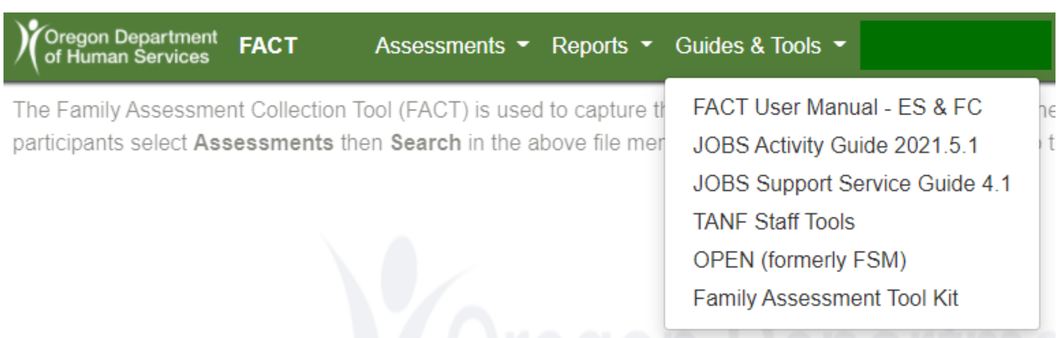
The ‘Goal Plan’ report will automatically bring the participant’s identified strengths, contact information and the date of the visit. Using the PDF button, a user can covert the “Goal Plan” report into a PDF.

Family Assessment Collection Tool (FACT)



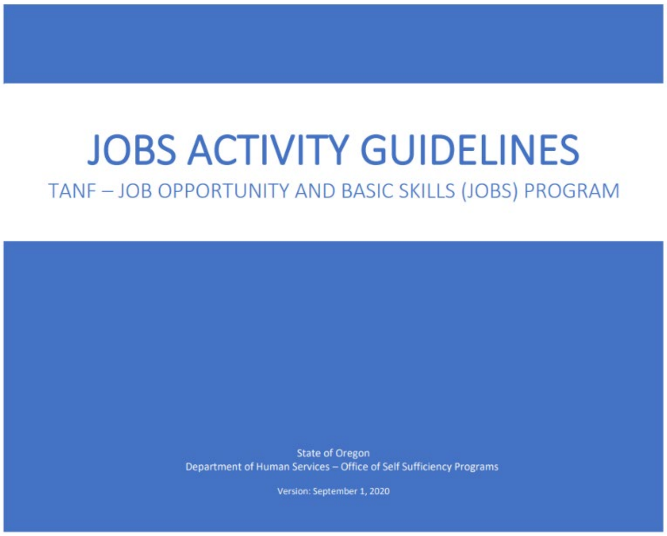
Guides & Tools

What types of guides and tools will be available?



Guides and tools are added to the FACT application by TANF Policy Analysts (FACT Administrators).

To access Guides & Tools the user will click on the <Guides & Tools> dropdown then select the guide or tool they wish to view. For example, if the user chooses “JOBS Activities Guidelines” a new window will open up on the JOBS Activity Guidelines.



Assistance with the FACT Application

Please reach out to TANF Policy at TANF.Policy@dhsoha.state.or.us if you have questions or needs assistance with the FACT application.

Here is a list of things the Administrators can assist you with:

- Adding newly hired TANF staff to the FACT application. These would be individual who have not been using FACT. After the 786 process is completed (see 786 Process below), the Operations Manager (OM) or their designee would email TANF Policy with a request to add an individual to FACT. TANF Policy would need:
  - New staff person's full name
  - OR number
  - RACF
  - Role – Limited Access user; Standard Access user; User Manager; Family Coach; or Engagement Specialist.

- Correcting an error on a closed Family Assessment record. Once a record has been closed the user can no longer make changes to the record. If there were:
  - Incorrect results entered,
  - Comments or notes with incorrect or inappropriate information,

    - Results entered on the wrong person, or
    - Other corrections needed.

- Updating Branch information: Branch number, phone number, email address, or physical address.

- Adding more links to guides and tools if appropriate.

- Help with setting up default settings; entering results; displaying reports or goal plan; creating PDF of reports or goal plans; etc.

Office of Information Systems – 786 Process

Office of Information Systems OWL site: Access Requests.

- Select "Make a Request"
- Select the "MSC 0786 Individual Access Request" and fill out all of the appropriate sections. Here is what to put in several specific sections of the request.
    - In Section II, select "Modify the person's access rights under the same manager".
    - In Section VI, select "Other Services" and add the following the text box: Add user to Security Group APP_Fact_User
    - Fill out Section IX and submit.