

Jennings County Assistance Network

CharityTracker

Shared Case Management Software

Data Entry Guide

June 13, 2016 Revision

This guide is intended to help ensure uniform data entry in CharityTracker. Assistance policies and criteria are determined by each program / agency. This guide does not in any way affect who can receive assistance or service for any individual agency.

Quick Reference

Release of Information (ROI)

A release of information is required to share anything other than case name, address and phone number with other agencies.

A client's signature on an ROI is not mandatory to receive assistance. It is however, your discretion to provide assistance or not to an individual who refuses to provide identification or sign a ROI. ROI is not required to view information in CT, to update or add information readily available, such as names, addresses and phone numbers.

- Verify the client's identity
- Choose the cases to include on the ROI, this same ROI will cover all the names you select.
- Print the ROI or sign digitally on a touch screen, tablet or phone screen.

Document Retention (Retain min of 6 yrs)

Each printed ROI form completed by a client will remain in effect for three years from its date. The original ROI forms shall be kept on file for a minimum of three years from their expiration date.

- Digitally signed ROI's will remain available in Charity Tracker for three years.



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CharityTracker Data Entry Guide

This guide is intended to help ensure uniform data entry in CharityTracker. Assistance policies and criteria are determined by each program / agency. This guide does not in any way affect who qualifies, or who can access assistance or service from any individual agency.

Identification

We must all understand that in some situations ID is unavailable, but services or assistance is needed. Information entered on an ROI form signed by a client may be entered in CT even in the absence of any form of identification.

Verify Identity

- Identification should be provided in some form- a valid driver's license or state issued ID is ideal.
- Social Security cards, other picture IDs, even a utility bill in the clients name could verify an address.

Absence of Identification

- Absence of ID should not exclude a client from being entered into CharityTracker.

Entering a new client

The following guidelines list the basic data needed to consider a new client entry to be complete.

Entering Identification

- **Drivers License** - Please use the first space under Identification for Drivers License numbers and State issued IDs. Indicate State and license number- **Example: IN 1234-56-7890 exp 1/1/2019**
- **Social Security** numbers are not required, but it is secure to enter SSN's. Some agencies use the last 4 digits of a SSN. It is not necessary to enter the complete number unless needed by your organization.
- **Label Other ID** Use the fields as you see fit to make the client as unique as possible, and avoid duplicates. Examples might include other picture IDs, even a utility bill in the clients name

First and Last Name:

- Always use upper and lower case letters. Please don't enter names as all capital letters.
- Always use a full first and last name (i.e. William instead of Will or Willy).
- Enter nicknames in the "Nickname" entry under identification.
- For hyphenated last names (i.e Jill Smith-Thomas) use the client's driver's license or other primary form of identification as the standard way of listing the correct name order.
- For people with two first names, enter both names under first name. Include a hyphen only if their name contains one.
- For individuals with spaces in their last names (Bob De La Sol) include the spaces when you type their name.

Middle name:

- Always collect and record the client's middle initial or name. This will decrease the likelihood of entering a client twice and will help with future client identification.



Suffixes:

- For family members that share a full name please include the proper suffix (Jr, Sr, I, II, III) in the “Identification” tab under “suffix”. Without the correct suffix CharityTracker will treat both individuals as a duplicate.

Maiden Name:

- Maiden names are not required, but when a maiden name is provided, add it under the “identification” tab. (Recently married women might want to provide that information strictly for clarification but that decision should be left for the client).

Head of Household:

- List one adult in the family as “head of household” in the “Identification” tab. If the household contains more than one adult, ask which one is “head of household”, or who is most likely to be accessing services regularly and label that one as “Head of Household.”

Officially, “Head of Household” is a filing status for individual United States taxpayers. In order to use the Head of Household filing status, the taxpayer must do the following:

- *Be unmarried or considered unmarried as of the last day of the tax year;*
- *Have paid more than half the cost of keeping up a home for the tax year (either one’s own home or the home of a qualifying parent); and*
- *In most cases, have a qualifying person who lived with the head in the home for more than half of the tax year except if the qualifying person is a dependent parent.*

Phone Numbers:

- Include a phone number for each client. If the client does not have a direct line, please include a relative, friend, neighbor or even a caseworker. It is helpful to note who that person is.
- If a client has a pre-paid cell phone, state “Pre-Paid Cell phone” in the phone description so other caseworkers understand that clients must be careful of the amount of time spent on a phone.
- If a client has a cell phone, state “text only” or calls or text etc in the phone description so other caseworkers understand that clients may not have minutes for calls but may be texted.
- Clients can have multiple phone number entries, so you can enter different phone numbers if clients think they will not always have access to the same phone number. This will aid CT partners in maintaining contacts with families.

Addresses (Living and Mailing):

- Always enter an address for a client. If a person is homeless and does not have a living address then collect a mailing address either from a shelter drop-in or a family member. Always use common abbreviations for streets and cardinal direction and include the zip code.

Income:

- List all sources of income in the last full calendar month including full and part-time employment, seasonal employment, self-employed salary, child support, Food Stamps, pension and retirement benefits, veteran benefits and social security income.



- Create a separate entry for each source of income; do not combine all sources of income into one monthly lump sum.

Demographics:

- The demographics data offers a chance to further advance the effectiveness of our programs by better understanding the populations that seek our services, and may provide opportunities to apply for funding to meet the needs of targeted groups. While not required to meet the requirements of a basic client entry records, it is highly recommended that this information is collected.

Relationships:

- List all members of a household and add relationship descriptions for each individual in the household.
- These two selections will update addresses to match with the head of household and aid the system in defining household composition - so be sure to select for each relationship description you create:
 - **“is a dependent of”** for each dependent
 - **“Both people live at the same address”** for every member living in that household.
- Children should be listed “live at the same address” only with the parent who has physical custody. Use the Notes Tab when necessary to comment on joint physical custody or transient living arrangements.
- For twins, always comment in the “Notes” section listing the other twin’s name. This will reduce errors. Be sure to include middle initials, as many parents will name twins with similar first names.
- Use the gender-neutral terms below whenever possible:

Grand-parent	Aunt/Uncle	Cousin
Parent	Boyfriend/girlfriend	Roommate
Sibling	Child	

Related but not living together:

- Individuals can be listed as related but do not need to live at the same address. Listing absent parents, or creating a relation between elderly parents and their adult children can often be helpful for other organizations to know.
- Children are “related but not living with” non-custodial parents.

Verifying that existing client entries are up-to-date

When you work with clients already entered into CharityTracker, you will need to verify that their information is still accurate and up-to-date:

Verifying client information:

- Read to the client the address, phone number, number of adult and child residents within the household and verify that all information is still current.
- Verify income and make the proper updates as needed.
- After pulling up the client profile in CharityTracker, review the “Outcomes”, “Notes” and “Alerts” tabs to see if any actions are needed. Other organizations might have set goals, left a note or an alert asking for additional information or requesting a follow-up with the client. If you fulfill any notes or alerts that ask for information or documentation, document these steps in Outcomes, a new Note or Alert.



Adding an Assistance log

- After entering all required information, complete any notes that might be needed by other staff members or other organizations. Always remember that someone else may not fully understand the situation, and to use the comments as needed to provide additional information and to reduce unnecessary phone calls.
- Be sure to assign values to the assistance provided.

Making a Referral or Request

- Click on the assistance tab, then click “Add Request/Referral” at the top next to the add assistance button.
- On the window that opens, click on “Select a service”
- Chose the program you wish to refer them to.
- Click Add request.
- The referral is sent immediately to the emails of that agency’s agents.
- The status of the referral can be checked in CT. Currently, the status available are:
 - Pending
 - Approved
 - Conditional Approval
 - Denied



Additional Program Specific Information

Federal Emergency Food & Shelter Program. (Previously known as **FEMA**) If your agency is awarded EFSP funds (FEMA), CharityTracker can help insure there is no duplication across the community that would result in ineligible assistance. Ineligible assistance due to duplicated services must be returned to National EPSP, therefore taking needed assistance dollars from our community. List that assistance under these categories.

- **EFSP (FEMA) "Other Food"** - This category includes food vouchers or food orders, food boxes, or food purchased by food banks and food pantries. Diapers are to be reported in the "Supplies / Equipment" category.
- **EFSP (FEMA) Rent / Mortgage** - This category pertains to LROs that will use funds to provide clients with rent / mortgage assistance (one month only per client / family)
- **EFSP (FEMA) "Other Shelter"** - This category pertains to LROs that will use funds to provide shelter outside to their own facility (motel, SRO, other non EFSP funded shelter)

House of Hope, Inc. - Referrals can be made in CT – Click on the assistance tab, then click “Add Request/Referral” at the top next to the add assistance button. On the window that opens, click on “Select a service” and chose House of Hope Waiting list. Add as much information as you care to in the details.

Financial Stability Programs - If your client has participated in budgeting or other financial education, please note that. Review the programs available at United Way and discuss options with the client to help further their progress through the FS programs. The current FS information is available online at www.jcunitedway.com.

Referrals can be made in CT – Click on the assistance tab, then click “Add Request/Referral” at the top next to the add assistance button. On the window that opens, click on “Select a service” and chose the program you wish to refer them to.

Getting Ahead in a just getting' by world - Program Outcomes are tracked entirely in CharityTracker through an assessment module that tracks resources prior, during and after the class as well as a stability scale and return on investment.

Day of Caring- Day of Caring projects can be referred in CT. These will be entered into CT with a \$ value assigned upon completion.

Holiday Assistance

- Food - Amount /notes / changes / additions
- Meal(s) - Amount /number served
- Gifts /Toys / Angel tree etc - Estimate dollar amount of assistance or gifts. This is crucial for other programs to determine eligibility. For example, a family receiving \$100 per child in gifts might not qualify for a shoe box program and accordingly, a family receiving a shoebox, one new toy, and/or a few gently used might still qualify for an angel tree or other program.
- Details tab- can list angel tree/wish list information such as Children’s Ages, Sex, Clothing sizes, Favorite things etc.