

TFC Data Collection Form-Flow

*Forms may be named differently in different data systems (e.g. in some systems, Service Deliveries may be called "Session Logs")

Timepoint	Family Coach/Engagement Specialist	Housing Specialist	Financial Counselor	Employment Navigator
<p>Enrollment/Intake Meeting After establishing that the family meets the program eligibility criteria, this is the first meeting members of the care team have with families.</p>	<ul style="list-style-type: none"> • TFC Guidelines/ Salesforce ROI/ MNPS ROI <i>(have Head of Household sign; scan and upload to Salesforce)</i> • Intake Form <i>(includes baseline Employment Details and Education History)</i> • Client Goals • Initial Self-report Form <i>(completed with Head of Household)</i> • Initial ASSM <i>(completed with Head of Household)</i> 	<ul style="list-style-type: none"> • Client Goals 	<ul style="list-style-type: none"> • Family Income • Client Goals 	<ul style="list-style-type: none"> • Employment Details <i>(on the individual's Program Engagement Participant record)</i> • Client Goals
<p>At each session with the family "Sessions" should only be defined as interactions where meaningful progress toward goals occurred. <i>(Follow up attempts, administrative phone contacts, etc. should be entered as "case notes" rather than sessions.)</i></p>	<ul style="list-style-type: none"> • Service Deliveries <i>(Session)</i> 	<ul style="list-style-type: none"> • Service Deliveries <i>(Session)</i> 	<ul style="list-style-type: none"> • Service Deliveries <i>(Session)</i> 	<ul style="list-style-type: none"> • Service Deliveries <i>(Session)</i>
<p>As Needed During Services These forms are updated when families attend events or make progress on key goals, such as education and employment.</p>	<ul style="list-style-type: none"> • Service Deliveries <i>(Event, Housing Placement, Housing Prevention, School Transfer)</i> • Income Update • Client Goals • Education History <i>(on the individual's Program Engagement Participant record)</i> • Employment Details <i>(on the individual's Program Engagement Participant record)</i> • Financial Assistance 	<ul style="list-style-type: none"> • Service Deliveries <i>(Event, Housing placement, Housing prevention)</i> • Client Goals 	<ul style="list-style-type: none"> • Service Deliveries <i>(Event)</i> • Income Update <i>(confirm with Family Coach)</i> • Client Goals 	<ul style="list-style-type: none"> • Service Deliveries <i>(Event)</i> • Employment Details <i>(on the individual's Program Engagement Participant record)</i> • Income Update <i>(confirm with Family Coach)</i> • Client Goals • Financial Assistance

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<p>Every 6 Months <i>(from the family's enrollment date)</i></p>	<ul style="list-style-type: none"> ● Self-report Form <i>(completed with Head of Household)</i> ● ASSM <i>(completed with Head of Household)</i> 	-----	-----	-----
<p>Program Exit</p>	<ul style="list-style-type: none"> ● Exit Self-report Form <i>(completed with the Head of Household)</i> ● Service Deliveries <i>(ensure all events family attended are listed)</i> ● Exit ASSM <i>(completed with Head of Household)</i> ● Exit Income ● Client Satisfaction Survey <i>(completed by the Head of Household)</i> 	-----	-----	-----