

Eviction Prevention: Agency Contributions

The "Return to NYC Program Page" takes you back to the NYC page on the TBF-Workplace site.

The "Return Westchester Program Page" takes you back to the Westchester page on the TBF-Workplace site.

The Reports links are specific to each program; the reports will be limited to clients of either NYC or Westchester.

[Return to NYC Program Page](#)
[Return to Westchester Program Page](#)

New York City Reports

[Client Ethnicity](#) | [Client Gender](#) | [Client Sources of Income](#) | [Client Loans](#) | [Client Services](#) | [Reasons For Arrears](#) | [Loan Purposes](#) | [Agency Contributions](#) | [Loans by Month](#)

Westchester Reports

[Client Ethnicity](#) | [Client Gender](#) | [Client Sources of Income](#) | [Client Loans](#) | [Client Services](#) | [Reasons For Arrears](#) | [Loan Purposes](#) | [Agency Contributions](#) | [Loans by Month](#)

TBFProgram: TBFNYC
Worker:
ClientID:

Last Name:
First Name:

Type of Service:

Service Provided AFTER:
Service Provided Before:

Search Form: What Services and Referrals has a client received? Or how many clients have received one or more Services/Referrals?

Leave all fields blank to see everything in the database (from end of December 2015). Or search for any or all of these: Bridge Fund Worker, ClientID, Client Names, Type of Service, and/or date or range of dates Service was provided. For example, to view all Services/Referrals made in March 2021, enter 3/1/2021 and 3/31/2021 in the date fields.

NOTE: All data in this example are test data as there are no "real" entries for Services in the database.

ServiceID	ServiceName
1	Vocational Course
2	Education GED
3	Education Training
4	Legal Benefits
5	Legal Housing
6	Legal Family
7	Legal Services
8	Substance Course
9	Substance-InPatie
10	Substance-OutPati
11	Benefits-Fixed Incc
12	Benefits-SNAP
13	Benefits-Medicare/
14	Benefits-Public Ass
15	Benefits-Other
16	Mental Health Refe
17	Legal Domestic Vk
18	Budget Counseling
(autonumber)	

Types of Service: Managers can add a type of service by clicking on this link:

[Edit Services Table](#)

You should be on the **Datasheet** tab highlighted in dark blue; if not, click on **Datasheet**.

Click on **NEW**

At the bottom of the table, enter a new **Service Name** (do not enter a ServiceID)

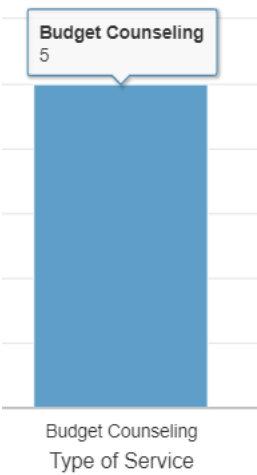
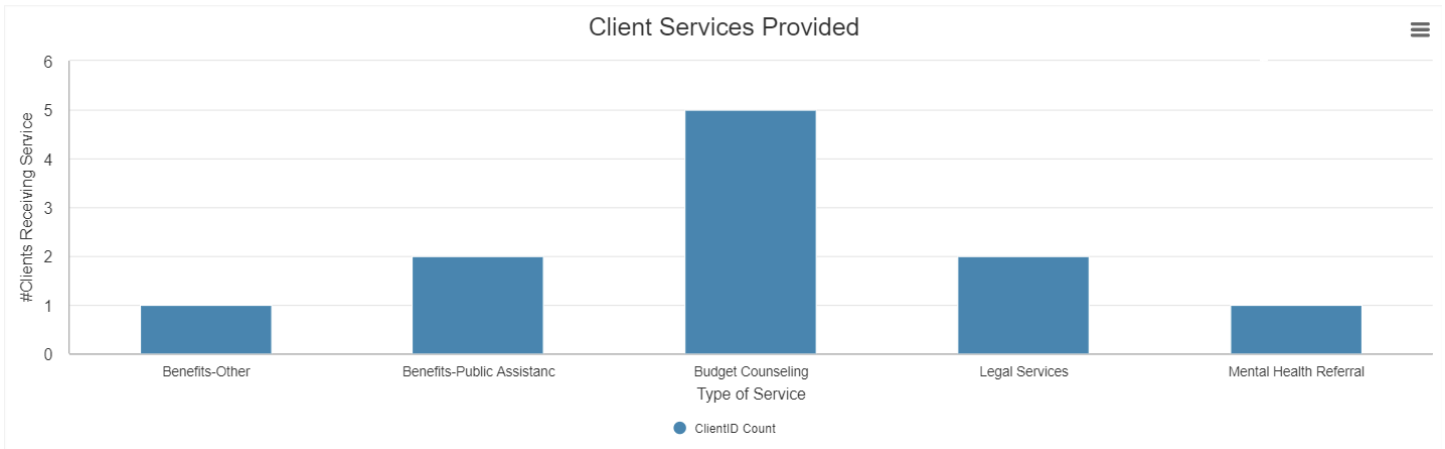
XX Do not Delete or Delete all, even if the Service is no longer available as you will delete any past data for that Service.

XX Do not Reset Autonumber or Change Table Design or Triggered Actions unless you are a developer of this application.

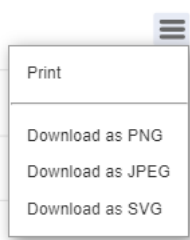
When finished, click on **Tables** in the left column and return to TBF-Workplace web page.

An Example: To see all test data in the database, no entries are made in the search form. When submitted, we see a two-part report: a column chart and a tabular report that lists all types of services provided the clients reported to have received services. Clients not receiving services are not listed.

The Column Chart: The X-axis shows a column for each Service. The Y-axis shows how many clients received that service. Note that a client may receive more than one Service/Referral.



If you hover the cursor over a column, you will see the count of clients receiving that Service.



If you click on the Menu in the upper right corner, you can choose to create a JPEG or PNG image of this chart for use in a report. (SVG images are for animation.)



The chart, and all charts in our application, will respond to your ZOOM-in or ZOOM-out browser settings.

The Tabular Data: Below the Column Chart is a table of data grouped by Type of Service that will show each client in that group. At the top of the table, we see that 11 Services were provided to 5 clients. We can also see how many clients received each type of service. This is the same information as shown when you hover over each column in the chart above.






[Search Again](#) [Download Data](#)

Select Type of Service ▲	ClientID	Last Name	First Name	Worker	Outcome: Select Best Description	Date Service Provided	Date Last Updated	Comments	Add Service
TOTAL SERVICES/REFERRALS	11								
#CLIENTS IN REPORT	5								
☐ Benefits-Other	1								
☐ Benefits-Public Assistance	2								
☐ Budget Counseling	5								
☐ Legal Services	2								
☐ Mental Health Referral	1								

Show per page

Click on the  symbol to EXPAND each group to see Client detail. Here, we have EXPANDED Legal Services. Just the left side of the report is shown here. Two “clients” (test data) received referrals for Legal Services. The Problem was Resolved for one client, and Outcome is “unknown” for the other. Comments add information to this referral. The program tracks when this information was last updated by a Bridge Fund worker. Use the  to COLLAPSE the group.

[Search Again](#) [Download Data](#)

Select Type of Service ^	ClientID	Last Name	First Name	Worker	Outcome: Select Best Description	Date Service Provided	Date Last Updated	Comments
TOTAL SERVICES/REFERRALS	11							
#CLIENTS IN REPORT	5							
 Benefits-Other	1							
 Benefits-Public Assistance	2							
 Budget Counseling	5							
 Legal Services	2							
	I118	AATest	AASample	SKC	Problem Resolved	3/1/2021	3/21/2021	Landlord problem with no heat. TEST DATA
	SZ101	AZLastName	AZFirstName	SKC	unknown	2/15/2021	3/21/2021	Client referred, doesn't return calls
 Mental Health Referral	1							

Show per page

Records 1-11 of 11

Landlord problem with no heat. TEST DATA	Add Service & Outcome	View Details	Edit	Delete
Client referred, doesn't return calls	Add Service & Outcome	View Details	Edit	Delete

Now, let's see what options are on the right side of this report. At the end of each client's row, following the Comments Column, are actions: Add another Service/Outcome for this client, view and update all details of THIS service, Edit details right on this page, or Delete this client's service (Careful!)

EDIT on this page: Click on [Edit](#) next to client I118 under Legal Services:

I118 AATest AASample 3/21/2021 [Add Service & Outcome](#) [UPDATE](#) [CANCEL](#)

We can change the Worker, the Outcome, the Date Service was Provided, and maybe the Comment (but there isn't much room to do that on the page). Click UPDATE to save changes, or Cancel.

If you need to change these things and/or the Type of Service or add a comment, click on [View Details](#).

[Search Again](#) [Report](#)

ClientID: I118 Worker:

Date Service Provided:

Outcome: Select Best Description

- Bridge Fund Provided
- Completed
- Confirmed
- Employed 20 hours or more
- Employed 30 hours or more
- Enrolled
- Failed
- Problem Resolved
- Received
- Rejected
- Unknown

Type of Service ^:

Comments:

[UPDATE](#) [DELETE](#) [BACK](#)

UPDATE

The [Search Again](#) link returns you to the Search form. The [Report](#) link takes you back to the Report Page, and the same will happen if you click on [Back](#). Of course [Delete](#) removes this Service from the client's history. If you want to cancel, click on **Back** or **Report** without clicking on **Update**. You must click on [UPDATE](#) to save your changes.

Add Service & Outcome

The Add Service & Outcome link at the end of a client's record row is for adding a brand new Service or Referral event for THIS client. The ClientID is remembered and cannot be changed. If you want to Add Service for a different client not in this report, go to the **Client Command Center**, search for the client, and you will find a link to ADD Service & Outcome for that client.

TBFProgram: TBFNYC

Worker: SKC ClientID: I118

Type of Service *: Education Training Date Service Provided *: 2/16/2021

Outcome (best definition):
 Bridge Fund Provided
 Completed
 Confirmed
 Employed 20 hours or more
 Employed 30 hours or more
 Enrolled
 Failed
 Problem Resolved
 Received
 Rejected
 Unknown

Comments: Enrolled in Life Saving course to enhance skills as YMCA trainer.

SUBMIT

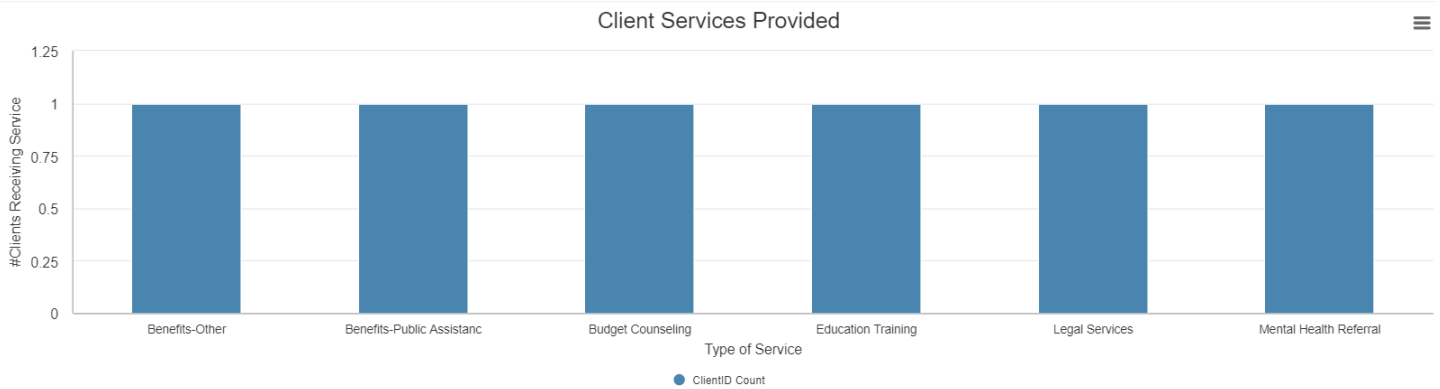
The data entry form in either case is the same. **Type of Service and Date Service was Provided** are required. Outcome can be added later as well as Comments. Worker initials are optional, but good information to have.

This is a sample entry for our test data client I118. Because this form can be used by either the Client Command Center or the Client Services Report, you have the option of going to either form after you SUBMIT.

Your submission was successful.

[Go To Client Command Center](#) OR [Go To Client Services Report](#)

Return to the Client Services Report and search for Client I118 by ClientID on the search form. The **Column Chart** will show the one Service of each type that Client I118 received. When you search by ClientID, only that client's Services are shown.



In the **Tabular Report**, we now see Education Training service.

Education Training 1									
I118	AATest	AASample	SKC	Enrolled	2/16/2021	3/21/2021	Enrolled in Life Saving course to enhance skills as YMCA trainer.	Add Service & Outcome	View Details

