

## 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.

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### Westchester Reports

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**Choose Agency by ACRONYM or AGENCY NAME, not both.  
Leave blank to see ALL agencies.**

If this is a report for Client Contributions only, select Agency Name *Client Contribution*

Westchester Agency Name

Westchester Agency Acronym

ClientID

Client First Name

Client Last Name

Contribution Date AFTER

Contribution Date BEFORE

TBF Program

TBFW

**SEARCH FORM:** All fields may be left blank to see ALL database entries. Or enter ClientID and/or Names to see Agency contributions for that client. Or choose Agency Name OR acronym to see an Agency’s contributions to clients. Do not choose both Name and Acronym. Enter Date or range of dates to limit search to that time period.

If TBFProgram is TBFW, only Westchester Agencies and Acronyms will be available.

If TBFProgram is TBFNYC, only NYC Agencies and Acronyms will be available.

To see only Client Contributions, select Agency Name as Client Contributions; acronyms are CLIENT-W or CLIENT-NYC.

Similarly, to see Management waivers, select Management as Agency Name, Management-W or Management-NYC as acronym.

Agencies include those who refer clients as well as those who contribute to arrears. The list of agencies can be modified. Instructions are at the end of this document.

In the following example, we are looking at only contributions to The Bridge Fund of Westchester. That is determined by the link to this report and is shown at the bottom of the Search Form as TBFW. You cannot change that program designation page. Here is a sample of Agency contributions to the Westchester program where we have specified no specific client or date. Each Agency who made a contribution toward a client’s arrears is listed with the total amount they have given.

\*Note that data in the database begins at the end of December 2015. Any prior contribution remains in ACCESS.

\*Note too, that if you specify a date or date range, only contributions that are in that time period will be included.

Agency Name ▲	ClientID	Client Last Name	Client First Name	Contribution Date	AgencyContribution Amount	Comments	ADD Contribution
<input type="checkbox"/> Adult Protective Services					\$1,000.00		
<input type="checkbox"/> Amicus Fund					\$950.00		
<input type="checkbox"/> Cancer Support					\$1,700.00		
<input type="checkbox"/> Catholic Charities					\$144,890.03		
TOTAL \$ CONTRIBUTIONS					\$2,729,366.38		

TOTAL # CONTRIBUTIONS 1,817

Show per page

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Each Agency has all the clients it contributed to grouped together. So see the individual client records, EXPAND the group by clicking on the  symbol next to the agency name, as shown here when the groups are EXPANDED.

Agency Name ▲	ClientID	Client Last Name	Client First Name	Contribution Date	AgencyContribution Amount	Comments	ADD Contribution
<input type="checkbox"/> Adult Protective Services					\$1,000.00		
Adult Protective Services Total # Contributions				1			
	W6352	Piper	Kevin	1/15/2019	\$1,000.00		<a href="#">Add Contribution (THIS client)</a> <a href="#">View Details</a>
<input type="checkbox"/> Amicus Fund					\$950.00		
Amicus Fund Total # Contributions				1			
	W6583	Bannister	Ruthie	11/8/2019	\$950.00		<a href="#">Add Contribution (THIS client)</a> <a href="#">View Details</a>
<input type="checkbox"/> Cancer Support					\$850.00		
Cancer Support Total # Contributions				1			
	W6008	Reeves	Lisa	8/9/2017	\$850.00		<a href="#">Add Contribution (THIS client)</a> <a href="#">View Details</a>
<input type="checkbox"/> Catholic Charities					\$144,890.03		
Catholic Charities Total # Contributions				110			
	W5699	Afua	Saran	4/12/2016	\$2,256.00		<a href="#">Add Contribution (THIS client)</a> <a href="#">View Details</a>
	W6570	Alexander	Doreen	10/11/2019	\$1,500.00		<a href="#">Add ...</a> <a href="#">View Details</a>

Again, the report gives a **total dollar amount of contributions** from each agency in this report following the name of the Agency. Under that, the total number of clients is given for each agency in this report. So here, we see that Adult

Protective Services (\$1,000), Amicus Fund (\$950), and Cancer Support (\$850) each provided one contribution in these amounts to one client. Catholic Charities (only partially shown here) provided 110 contributions totaling \$144,890.03. Remember that our database begins in 2016, so this is not the total historical contributions for an agency.

**Sorting:** The report is sorted by Agency Name, A to Z. And then by Client Last Name within each Agency. By clicking in any column heading, you can sort by that column, either A to Z, Z to A, or by dates, newest to oldest or oldest to most recent. Click on **Search Again** to renew the search using different criteria.

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

Agency Name	Catholic Charities		
ClientID	W6570		
Client First Name	Doreen	Client Last Name	Alexander
Contribution Date	<input type="text" value="10/11/2019"/>		
AgencyContribution Amount	<input type="text" value="1500"/>		
Comments	<input type="text"/>		

Record  of 1816

Westchester Agency Acronym	Westchester Agency Name	
<input type="text" value="Select ACRONYM"/>	<input type="text" value="Select Agency Name"/>	
Contribution Amount	Contribution Date	
<input type="text"/>	<input type="text"/>	
Loan Type	<input type="text"/>	
ClientID	Client First Name	Client Last Name
<input type="text" value="W6570"/>	<input type="text" value="Doreen"/>	<input type="text" value="Alexander"/>
TBF Program	TBFW	
Comments		
<input type="text"/>		

Use **View Details** to see complete data pertaining to the client in that row. For example, View Details about W6570, the last row shown above, shows all the information on that row and allows you to edit/change any detail except the ClientID. This is not the form to use to ADD a new contribution, only to UPDATE one already in the database. Add a comment, or change the date or amount.

You can **DELETE** this contribution (Careful!). Use **BACK** or **Report** to return to the report, or click **Search Again** to return to the Search Form.

**ADD CONTRIBUTION** for THIS client. From the Report Page, click on **ADD CONTRIBUTION** to enter a NEW contribution to this same client from any Agency or to add a Client Contribution from themselves. The ClientID and Name will be filled in automatically:

This form is also accessible from the [Client Command Center](#).

Fill out the new information and SUBMIT.

**Agency Acronym**

Adult Protective Services

**Contribution Amount**

300

**Contribution Date**

10/19/2019

**Loan Type**

G1

**ClientID**

W6570

**Client First Name**

Doreen

**Client Last Name**

Alexander

**TBF Program**

TBFW

**Comments**

**SUBMIT**

Now we see the new contribution of \$300 to client W6570 listed under the Agency, Adult Protective Services as well as the previous contribution from Catholic Charities.

Agency Name	ClientID	Client Last Name	Client First Name	Contribution Date	AgencyContribution Amount	Comments	ADD Contribution
<b>Adult Protective Services</b>					<b>\$1,300.00</b>		
Adult Protective Services Total # Clients	2						
	W6570	Alexander	Doreen	10/19/2019	\$300.00	Add Contribution (THIS client)	
	W6352	Piper	Kevin	1/15/2019	\$1,000.00	Add Contribution (THIS client)	
<b>Amicus Fund</b>					<b>\$950.00</b>		
Amicus Fund Total # Clients	1						
	W6583	Bannister	Ruthie	11/8/2019	\$950.00	Add Contribution (THIS client)	
<b>Cancer Support</b>					<b>\$850.00</b>		
Cancer Support Total # Clients	1						
	W6008	Reeves	Lisa	8/9/2017	\$850.00	Add Contribution (THIS client)	
<b>Catholic Charities Westchester</b>					<b>\$144,890.03</b>		
Catholic Charities Westchester Total # Clients	110						
	W5699	Afua	Saran	4/12/2016	\$2,256.00	Add Contribution (THIS client)	
	W6570	Alexander	Doreen	10/11/2019	\$1,500.00	Add Contribution (THIS client)	

Now, if we go back to the Agency Contributions report's Search Form and Search for ClientID W6570 (or for Doreen Alexander by name), we will see a report on all contributions made to this client from all agencies, including her own contribution:

Agency Name ▲	ClientID	Client Last Name	Client First Name	Contribution Date	AgencyContribution Amount	Comments	ADD Contribution
<b>Adult Protective Services</b>					<b>\$300.00</b>		
Adult Protective Services Total # Clients		1					
	W6570	Alexander	Doreen	10/19/2019	\$300.00	Add Contribution (THIS client)	View Details
<b>Catholic Charities Westchester</b>					<b>\$1,500.00</b>		
Catholic Charities Westchester Total # Clients		1					
	W6570	Alexander	Doreen	10/11/2019	\$1,500.00	Add Contribution (THIS client)	View Details
<b>Client Contribution Westchester</b>					<b>\$600.00</b>		
Client Contribution Westchester Total # Clients		1					
	W6570	Alexander	Doreen	10/11/2019	\$600.00	Add Contribution (THIS client)	View Details
<b>TOTAL CONTRIBUTIONS</b>					<b>\$2,400.00</b>		

**Download Data:** Use Download Data to print a spreadsheet of an Agency’s contributions overall, or their contributions to a specific client, or for an individual’s contributions from all agencies, etc. Click on Download Data and an Excel file will be generated.



Click on the filename to open this file with EXCEL. Note that the filename will have the day’s data appended so you can’t overwrite a previous file from this report.

	A	B	C	D	E	F	G
1	<b>Agency Name</b>	<b>ClientID</b>	<b>Client Las</b>	<b>Client Firs</b>	<b>Contribution</b>	<b>AgencyCc</b>	<b>Comments</b>
2	Adult Protective Services					\$300.00	
3	Adult Protective Services	1					
4		W6570	Alexander	Doreen	10/19/2019	\$300.00	
5	Catholic Charities Westchester					\$1500.00	
6	Catholic Charities Westchester T	1					
7		W6570	Alexander	Doreen	10/11/2019	\$1500.00	
8	Client Contribution Westchester					\$600.00	
9	Client Contribution Westchester	1					
10		W6570	Alexander	Doreen	10/11/2019	\$600.00	
11	Total Contributions					\$2400.00	
12	Total # Contributions	3					

Adding a New Agency: You need the Agency Name and an acronym.

Use one of these links:

For Westchester: [https://c2abz574.caspio.com/ui/apps/NYCWApplication/tables/tblAgency\\_Lookup\\_W/open](https://c2abz574.caspio.com/ui/apps/NYCWApplication/tables/tblAgency_Lookup_W/open)

For New York City: [https://c2abz574.caspio.com/ui/apps/NYCWApplication/tables/tblAgency\\_Lookup\\_N/open](https://c2abz574.caspio.com/ui/apps/NYCWApplication/tables/tblAgency_Lookup_N/open)

The table looks like this:

Datasheet				
Table Design				
Triggered Actions				
New	Refresh	Download	Find	Replace
Filter	Reset Autonumber	Delete	Delete All	
<input type="checkbox"/>	AgencyID	Agency	acronym	TBFProgram
<input type="checkbox"/>	9CNK11ZC	Adult Protective Services	Adult Protective S	TBFW
<input type="checkbox"/>	VAE65S0L	Actor's Fund	AF	TBFNYC
<input type="checkbox"/>	9RC0E1C9	Amicus Fund	Amicus Fund	TBFW

1. The **Datasheet** tab should be highlighted in dark blue. If not, click on the Datasheet tab
2. Click on **New**.
3. **XX DO NOT** enter an AgencyID (the program generates this).
4. DO enter Agency name, acronym, and TBFProgram (either TBFW or TBFNYC)

<input type="checkbox"/>	RICEQUBW	Westchester Residential Opportunities	WRO	TBFW
	(random id)	ENTER AGENCY NAME HERE	ACRONYM	TBFW

Datasheet				
Table Design				
Triggered Actions				
New	Refresh	Download	Find	Replace
<input type="checkbox"/>	AgencyID	Agency	acronym	TBFProgram
<input checked="" type="checkbox"/>	311OV0JC	Assertive Commu		
<input type="checkbox"/>	9CNK11ZC	Adult Protective S		
<input type="checkbox"/>	9RC0E1C9	Amicus Fund		
<input type="checkbox"/>	9113AT98	Cancer Support		
<input type="checkbox"/>	N2SS3LSW	Community Actio		
<input type="checkbox"/>	N34XS054	Catholic Charitie		
<input type="checkbox"/>	IEP0J5FS	Catholic Charitie		
<input type="checkbox"/>	6JYBFYEF	Community Hous		
<input type="checkbox"/>	9TYIU4F2	Church		
<input type="checkbox"/>	C9LS405F	Church of Christ		
<input type="checkbox"/>	D39608DP	Client Contributio		
<input type="checkbox"/>	UX2IDJB4	Cluster Commun		
<input type="checkbox"/>	P4NMSLV8	CVR		

5. When finished, click on Tables in the left margin. Return to the TBF-Workplace web page for your program.

**XX** Please do not Delete or Delete All or Replace. Even if the agency no longer contributes, or even exists, any past contributions will be deleted if you delete the agency.

**XX** Please do not click on Table Design or Triggered Actions unless you are the developer of this application.

## Appendix: Reports to Agency Funders

The following examples are responses to questions from The Bridge Fund of New York City on how to tailor the Search Form in this report to answer an Agency's questions about clients they helped with contributions.

### Question: Show the Amount of all Agency Contributions to Bronx Clients during a given month:

For April 2021, fill out the Search Form by using just "B" as ClientID to get all Bronx clients in the date range.

Choose Agency by ACRONYM or AGENCY NAME, not both.  
Leave blank to see ALL agencies.

If this is a report for Client Contributions only, select Agency Name *Client Contribution*

NYC Agency Name  NYC Agency Acronym

ClientID

Client First Name  Client Last Name

Contribution Date AFTER  Contribution Date BEFORE

TBF Program  
TBFNYC

Use "W" for Westchester or "R" for Retirement Subsidy clients.

For April dates, use either 3/31/2021 – 5/1/2021 OR 4/1/2021 – 4/30/2021.

Use your program link to this report. If your program is Westchester (TBFW), the agency names will be those in the table of Westchester Agencies.

**The Results:** Shown here are the first 6 columns on the LEFT side of the result table. At the top, we see the total Agency Contributions for the specified date range grouped by month/year was \$14,898.87.

Next, we see all the agencies making contributions during our selected date range. NOTE: the results include ALL sources including Client Contribution. The

total amount contributed by each agency is shown.

At the bottom is the number of Bronx clients receiving Agency Contributions during the time period. The average contribution to these 5 clients was \$1,655.43. Click on the "+" next to Agency Name (ie, Catholic Charities) to see clients benefitting from the Agency Contribution. Client B10911:\$700 contribution in April 2021.

Search Again Download Data

Agency Name	Contribution Date	ClientID	Last Name	First Name	tblAgencyContribution ContributionAmount
TOTAL					\$14,898.87
+ Catholic Charities					\$700.00
+ Client Contribution					\$2,203.88
+ Coalition for the Homeless					\$2,500.00
+ Human Resources Administration					\$6,216.00
+ Part of the Solution					\$2,000.00
+ The Havens Relief Fund Society					\$1,278.99
#CLIENTS		5			
AVERAGE					\$1,655.43

+ Catholic Charities					\$700.00
Catholic Charities #Clients		1			
April 2021					\$700.00
April 2021 #Clients		1			
		B10931			\$700.00
April 2021 Average					\$700.00
Catholic Charities Average					\$700.00

**Question: For a specific agency, show the Agency Contributions for a benefit period and client information about race, income and type, rent, type of housing, etc.**

Same report, but focus on a specific agency and look at more client details.

TBFProgram  
TBFNYC

ClientID

Type

Loan Date AFTER  Loan Date BEFORE

Use  
Select Purpose of Loan/Grant

Agency Name  
Part of the Solution

Agency Contribution Date AFTER  3/31/2021 Agency Contribution Date BEFORE  5/1/2021

**SEARCH**

First, the Agency Contribution: in this example, a range of dates for the AGENCY CONTRIBUTION is chosen, as well as an Agency name, ie *Part of the Solution*.

We could also have limited the results Loan date, or Use/Purpose of loan (such as "Eviction Prevention"), or Type ("L" for loan or "G" for grant), or borough (by using "B" for ClientID limiting the results to Bronx clients).

Agency Name	Contribution Date	ClientID	Last Name	First Name	tblAgencyContribution ContributionAmount
TOTAL					\$2,000.00
<input type="checkbox"/> Part of the Solution					\$2,000.00
#CLIENTS		1			
AVERAGE					\$2,000.00

The left corner of the results shows the Agency Name and total of \$2,000 in contributions from this agency during the time period we selected. Since there was only one client, the AVERAGE contribution is the same as the TOTAL. Next to the Agency name is a "+" sign. Click on that to EXPAND to see all the clients in this group.

<input type="checkbox"/> Part of the Solution				\$2,000.00
Part of the Solution		1		
#Clients				
April 2021				\$2,000.00
April 2021		1		
#Clients				
		B10937		\$2,000.00
April 2021				\$2,000.00
Average				

If we specified a longer date range, the results would be grouped by Month and Year. We see that Client B10937 was the recipient of the #2,000 contribution.

**Scroll to the right to see details about this client.**

At the top are the demographic and other details for the group of all recipients of the agency's contributions. Then just the details for each client individually.

In this case, there is only one client recipient, so group totals and individual totals are the same. Group totals for family composition and ethnicity are shown here.

# Adults	# Adult Children	# Children	# Seniors	#Household Members	Housing Type	Rent	#Black	#White	#Hispanic	#Asian
0	0	0	1	1			0	0	1	0

Group totals are at the top. Scroll down to see month and individual totals.

Contribution Date	ClientID	Last Name	First Name	tblAgencyContributionContributionAmount	# Adults	# Adult Children	# Children	# Seniors	#Household Members	Housing Type	Rent	#Black	#White	#Hispanic	#Asian
				\$2,000.00	0	0	0	1	1			0	0	1	0
				\$2,000.00	0	0	0	1	1			0	0	1	0
	1														
April 2021				\$2,000.00	0	0	0	1	1			0	0	1	0
April 2021 #Clients	1														
	B10937			\$2,000.00	0	0	0	1	1	NYCHA	1074.00	0	0	1	0
April 2021 Average				\$2,000.00											

Totals by month are also shown. To follow just one individual's details, follow the line with the ClientID as you scroll right. Here we see the household for B10937 has 1 senior who is Hispanic, lives in NYCHA housing and pays \$1074 in rent. The next columns are Sources of Income. B10937 has \$1,916 monthly income from Employment, and no other sources (not all are shown here since the amounts were all \$0). There is a separate report for delving into sources of income for Bridge Fund clients.

Employment Amount	Part Time Amount	Supplemental Security Amount	Social Security Disability Amount	Social Security Retirement Amount	Workmans Compensation Amount	Child Support Amount	Temp Disability Amount	Roommate Amount	SNAP Amount	FHEPS Amount	Pension Amount	Vet Benefits Amount	Cash Supplement Amount
\$1,916.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Monthly Household Income	Rent Burden	AMI Taxable Annual Income	AMI% for Household Size	Comments
\$1,916.00	56.05%	\$22,992.00	27.5	<a href="#">View Details</a>

**Monthly Household Income** is the total of all the sources of income. The **Rent Burden** is the amount for **Rent** (column 13) divided by **Monthly Household Income** and shown as a percentage. **AMI (Area Median Income) Taxable Annual Income** includes only taxable sources of income such as wages, unemployment benefits, and pension and is shown as an annual amount. This amount is used to calculate the **AMI%** based on household size (in this case, just 1) and where this client lives (NYC metro).

Use **View Details** to modify **Contribution Amount**, **Contribution Date** or **Comments**. Contribution may also be Deleted from View Details (be careful!).



**Question: Amount Bronx clients contributed for their rent during a given month:**

For June 2021, fill out the Search Form this way:

**Choose Agency by ACRONYM or AGENCY NAME, not both.**  
**Leave blank to see ALL agencies.**  
**If this is a report for Client Contributions only, select Agency Name *Client Contribution***

NYC Agency Name: Client Contribution  
 NYC Agency Acronym: Select Acronym

ClientID: B

Client First Name:   
 Client Last Name:

Contribution Date AFTER: 05/31/2021  
 Contribution Date BEFORE: 07/01/2021

TBF Program: TBFNYC

For Westchester Clients, use the link to this report for your program (TBFW), and use “W” for ClientID.

**The Results: click on the “+” next to Client Contribution to see actual clientIDs.**

Total Client Contributions from four Bronx clients during June 2021 was \$6,815.18 with the average contribution of \$1,703.80.

Search Again Download Data

Agency Name	Contribution Date	ClientID	Last Name	First Name	tblAgencyContribution ContributionAmount
TOTAL					\$6,815.18
+ Client Contribution					\$6,815.18
#CLIENTS		4			
AVERAGE					\$1,703.80