

Action for Prosperity II: Progress and Follow-Up

The Action for Prosperity II (AFP2) Progress and Follow-Up Assessment must be completed for **each** client participating in AFP2 services. The AFP2 Progress and Follow-Up assessment must be completed at Entry, every 3 months after the Entry, at Exit, and at follow-up (3, 6, 9, and 12 months.) The assessment is located in the 'Assessments' tab in the client's record.

Assessments

There are 3 sections to the AFP2 Progress and Follow-Up Assessment:

- Action for Prosperity Matrix
- Housing and Employment
- Monthly Income

Action for Prosperity Matrix

Click Add to enter the matrix values in the window that opens. Enter data for the questions in red font: Enter the date the matrix was completed, the matrix interval (follow-up intervals are at the bottom of the pull-down menu), and the follow-up status (only answer if this is a follow-up interval, otherwise leave this question blank) and enter a numerical value (0-10) for each of the 6 domains. Please keep in mind that the income score is determined by the household's income and the number of people in the household.

The screenshot shows the 'Action for Prosperity Matrix' form. A red box highlights the 'Add' button. A red arrow points to the 'Add' button with the text 'Click 'Add' to enter matrix data'. The form contains the following fields: 'Data Entry Date' (08/14/2013), 'Matrix Completion Date' (08/14/2013), 'Matrix Interval' (Select), 'Follow-Up Status' (Select), 'Income Score' (0), 'Financial Management Score' (0), 'Housing Score' (0), 'Employment Life Skills Score' (0), 'Training Score' (0), and 'Employment Score' (0). A red box highlights the 'Save' button. A red arrow points to the 'Save' button with the text 'Enter date matrix was completed'. A red arrow points to the 'Matrix Interval' dropdown with the text 'Select interval (follow-up intervals are at bottom) Only answer if this is a follow-up matrix'. A red arrow points to the score fields with the text 'Enter a value (0-10) for each of the 6 Domains'.

Click 'Save' to return to the AFP2 Progress and Follow-Up assessment, where the matrix scores will now be visible.

If a matrix was completed for the client within one month of exit, and the scores have not changed, simply change the Matrix Interval of the last matrix completed to be Exit. For example a client exits after 16 months and the matrix was completed at 15 months; if the matrix scores have not changed you simply change the Matrix Interval from 15 months to Exit. If the matrix scores changed, you will enter an Exit matrix in addition to the 15 month matrix.

Housing and Employment

Click 'Add' in the Housing and Employment section to enter housing and employment data. Enter data for questions in red font. You must click 'Add' and answer questions at Entry, every 3 months during program enrollment, at Exit and follow-up (3,6,9, and 12 months)

The screenshot shows the 'Housing and Employment' form. The form contains the following fields: 'Data Entry Date', 'Progress and Follow-Up Interval', 'Follow-Up Status', 'Has the client's housing or employment information changed since the last interval?', 'Client's Living Situation', 'Employment Status', 'Employer', 'Date of Hire', 'Job Title', 'Average Hours Worked Per Week', 'Hourly Wage', 'Employer-Paid Healthcare Benefit?', and 'Follow-Up Interval'. A red box highlights the 'Add' button.

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Housing and Employment (Continued)

You will need to enter data for each job the client holds at that interval. You must always enter the Progress and Follow-Up Interval; follow-up intervals are found at the bottom of the pull-down menu. Follow-Up Status is only answered if you select a follow-up interval; otherwise leave this question blank. 'Has the client's housing or employment changed since the last interval?' must be answered at each interval; select 'Not applicable (Entry interval)' if this is the Entry interval. If there was a change in ANY housing OR employment information since the previous interval (or if this is the Entry interval) then all housing and employment questions must be answered.

Client's Living Situation must be answered at least once for each interval. You must enter employment information for each job your client holds at this interval; click 'Save and Add Another' to enter additional employment information.

If no information has changed since the last interval ('Has the client's housing or employment changed since the last interval?' is answered 'No') then no housing or employment status questions need to be answered.

Add Recordset - (275552) Client, Silly

Housing and Employment

Data Entry Date * 08 / 15 / 2013

Progress and Follow-Up Interval -Select- Always select the Interval; follow-up intervals at bottom

Follow-Up Status -Select- Only answer if this is a follow-up interval

Has the client's housing or employment information changed since the last interval? -Select- Always answer this; if this is the Entry interval select: Not applicable (Entry interval)

If the answer above is 'Yes', or if this is the Entry interval, answer ALL questions below:

Client's Living Situation -Select- This question must be answered at least once for each interval where change occurred

Employment Status -Select- Enter the employment status and employment information for each job that the AFP2 client holds. If the client is retired or not employed, only answer the employment status question and leave the remaining questions blank

Employer - / /

Date of Hire - / /

Job Title

Average Hours Worked Per Week

Hourly Wage

Employer-Paid Healthcare Benefit? -Se

DO NOT USE! - / /

Follow-Up Interval -Select-

Save Save and Add Another Cancel

Income

Income must be collected at Entry, every 3 months during program enrollment, at Exit and at follow-up (3, 6, 9, and 12 months.) Any income entered in the client's record at Entry (and any income from enrollments in previous programs) will be visible.

Click 'Add' in the Monthly Income section to enter data for each interval. The Progress and Follow-Up

Monthly Income Any previous income, e.g. income added in the Entry screen (or prior program enrollments,) will be visible

Start Date *	Source of Income	Last 30 Day Income	End Date
08/19/2013	Earned Income (HUD)	US\$739.20	06/13/2014

Add v Forgot to answer the AFP2 interval question when adding income in the Entry screen? Click the pencil to add it now

Click the 'Add' button to answer the AFP2 interval question (required at every interval) and add any new income received

Interval must be answered for each interval; if a follow-up interval is selected, the follow-up status must also be completed. *If the Entry interval was not specified when the income was added in the Entry screen, click the pencil to the left of the Start Date and select 'Entry' from the Progress and Follow-Up Interval question.

If the client's income has changed since the last interval, you will need to enter the new income in the window that opens (in addition to answering the interval question.) *Remember to add an End Date to any income that is no longer received during the current interval.

If the client's income has not changed since the last interval, you will only need to answer the interval question (and the follow-up status if a follow-up interval is selected.)

Click 'Save and Add Another' to enter additional incomes; otherwise click 'Save.'

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Income (Continued)

Add Recordset - (275552) Client, Silly

Monthly Income

Start Date * 11 / 29 / 2013

Source of Income -Select-

If Other, Please Specify

Receiving Income Source? Yes

If other, specify

Last 30 Day Income

End Date

Action for Prosperity II ONLY!!

Progress and Follow-Up Interval 3-Month

Follow-Up Status -Select-

Save Save and Add Another Cancel

If client began receiving new income since previous interval, add it here, following typical income data entry guidelines. Leave these questions blank if there was no change in income.

Remember to add an End Date to prior income records that are no longer being received in the current interval

Progress and Follow-Up Interval must be answered for every interval. This question will need to be answered even if there were no income changes for this client. Follow-Up Status must always be answered if a follow-up interval was selected.

If new income was added in the interval, the income will be visible once on the Progress and Follow-Up page after you click 'Save'. If no new income was added and only the Progress and Follow-Up Interval was answered, it will appear as though a blank income line was inserted.

Monthly Income				
	Start Date *	Source of Income	Last 30 Day Income	End Date
	06/14/2014	New Exit Income!	Earned Income (HUD)	US\$1,920.00
	02/24/2014	The 6-Month Interval,	no income changed. This line appears blank! Do not delete it!	
	11/29/2013	The 3-Month Interval,	no income changed. This line appears blank! Do not delete it!	
	08/19/2013	Entry Income	Earned Income (HUD)	US\$739.20
				06/13/2014

End Date added once this income was no longer received

Do not delete these blank income lines. This will be reported that an income verification was completed at the interval and that the client's income has not changed since the last interval.

Action for Prosperity II: Progress and Follow-Up

Housing and Employment Change Examples

If ANY housing or employment information changes, then ALL housing and employment questions must be answered.

Changes to housing or employment that will require an update to client's housing and employment data:

- Change in wages (e.g. hourly wage increases from \$8.80 to \$8.90)
- Change in hours (e.g. weekly hours increased or decreased)
- Change in employer (e.g. they got a new job or lost a job)
- Change in employer-paid healthcare benefits (e.g. obtained or lost employer-paid health insurance)
- Change in housing type:
 - Client started receiving a subsidy (e.g. they were living in a rental with no subsidy when they began AFP2 and the client is now enrolled in STRA which has began rental assistance)
 - Client moved from temporary housing (e.g. couch surfing) to permanent housing (e.g. rental)

Changes that to housing or employment that will not require an update:

- Change in address, but still resides in the same housing type
 - Client moved from one rental (with no subsidy) into a more affordable apartment (still a rental with no subsidy)
- Infrequent overtime worked during interval

Please contact the Multnomah County ServicePoint helpline if you need assistance in determining whether an individual client's change requires that the entire housing and employment section be completed.

Sample AFP II Progress and Follow-Up

DSCP_AFP II Progress and Follow-Up
Save Cancel

Action for Prosperity Matrix

	Data Entry Date *	Matrix Completion Date	Matrix Interval	Income Score	Financial Management Score	Housing Score	Employment Life Skills Score	Training Score	Employment Score
	09/03/2014	08/16/2014	Follow-Up (3-Month)	6	6	6	7	8	7
	06/14/2014	05/23/2014	Exit	6	6	6	7	8	7
	02/28/2014	02/24/2014	6-Month	2	4	5	7	7	7
	11/29/2013	11/19/2013	3-Month	2	4	4	7	6	2
	09/03/2013	08/19/2013	Entry	2	4	4	6	5	2

Add Matrix is completed for Entry, 3 month intervals, Exit and Follow-Up; there is a matrix line for each interval

Housing and Employment

	Data Entry Date	Progress and Follow-Up Interval	Follow-Up Status	Has the client's housing or employment information changed since the last interval?	Client's Living Situation	Employment Status	Employer	Date of Hire	Job Title	Average Hours Worked Per Week	Hourly Wage	Employer-Paid Healthcare Benefit?	Follow-Up Interval
	09/03/2014	Follow-Up (3-Month)	Located-Successful Contact	No									
	06/14/2014	Exit		Yes	Owned by client, no housing subsidy (HUD)	Full-Time Employment	Cedar Hills Assisted Living Facility	04/14/2014	Certified Nursing Assistant	40	US\$12.00	Yes	
	02/28/2014	6-Month		Yes		Job Training Program							
	02/28/2014	6-Month		Yes	Rental by client, no housing subsidy (HUD)	Part-Time Employment	McDonald's	09/12/2011	Cashier	20	US\$8.80	No	
	11/29/2013	3-Month		No									
	09/03/2013	Entry		Not Applicable (Entry interval)	Rental by client, no housing subsidy (HUD)	Part-Time Employment	McDonalds	09/12/2011	Cashier	20	US\$8.80	No	

Add Housing and employment is completed at Entry, 3 month intervals, Exit and Follow-Up; there should be at least 1 line for each interval (an interval may have multiple lines if a client has more than one job) Last

Monthly Income

	Start Date *	Source of Income	Last 30 Day Income	End Date
	06/14/2014	Exit Income	Earned Income (HUD)	US\$1,920.00
	02/24/2014	6 Month Income		
	11/29/2013	3 Month Income		
	08/19/2013	Entry Income	Earned Income (HUD)	US\$739.20 06/13/2014

Add Income must be completed at Entry, 3 month intervals, Exit and Follow-Up; there should be at least 1 line for these intervals; lines may appear blank on this screen, but if the income record is opened, you should see that the Progress and Follow-Up Interval (and possibly Follow-Up Status) is answered.

Questions? Contact the Multnomah County ServicePoint Helpline: (503) 970-4408 or servicepoint@multco.us

Oct. 29, 13

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