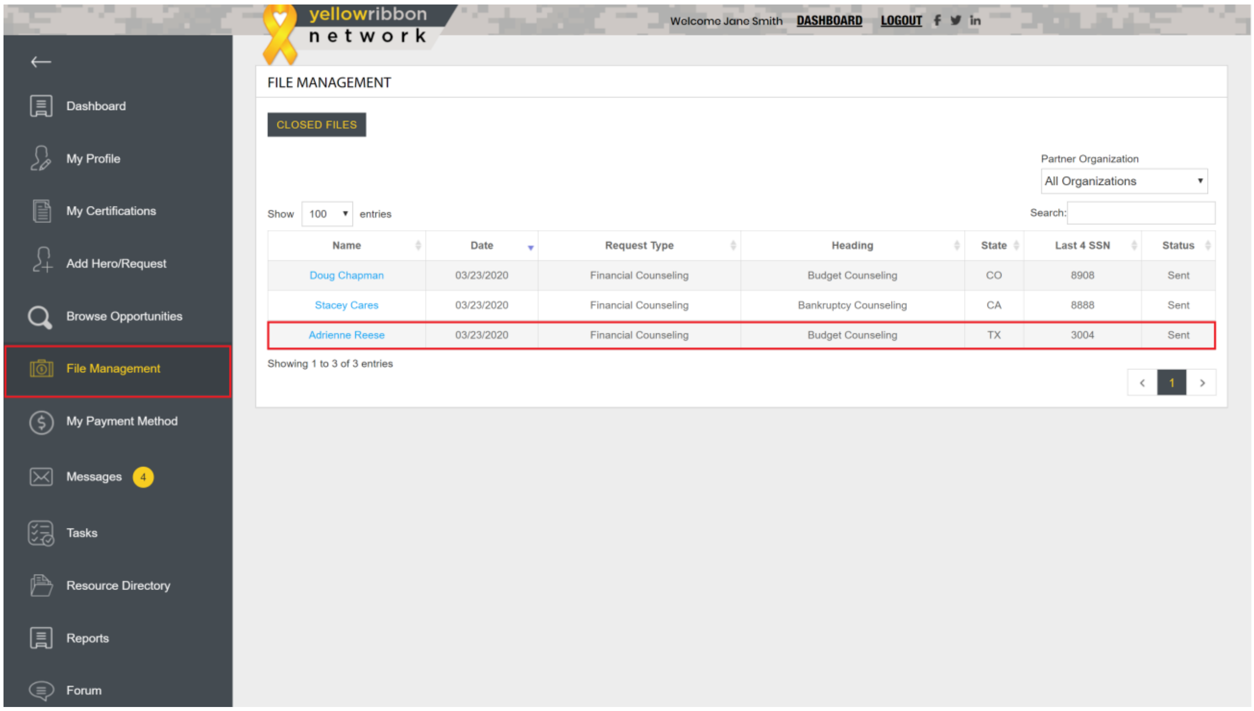
AFCPE®

yellowribbon network

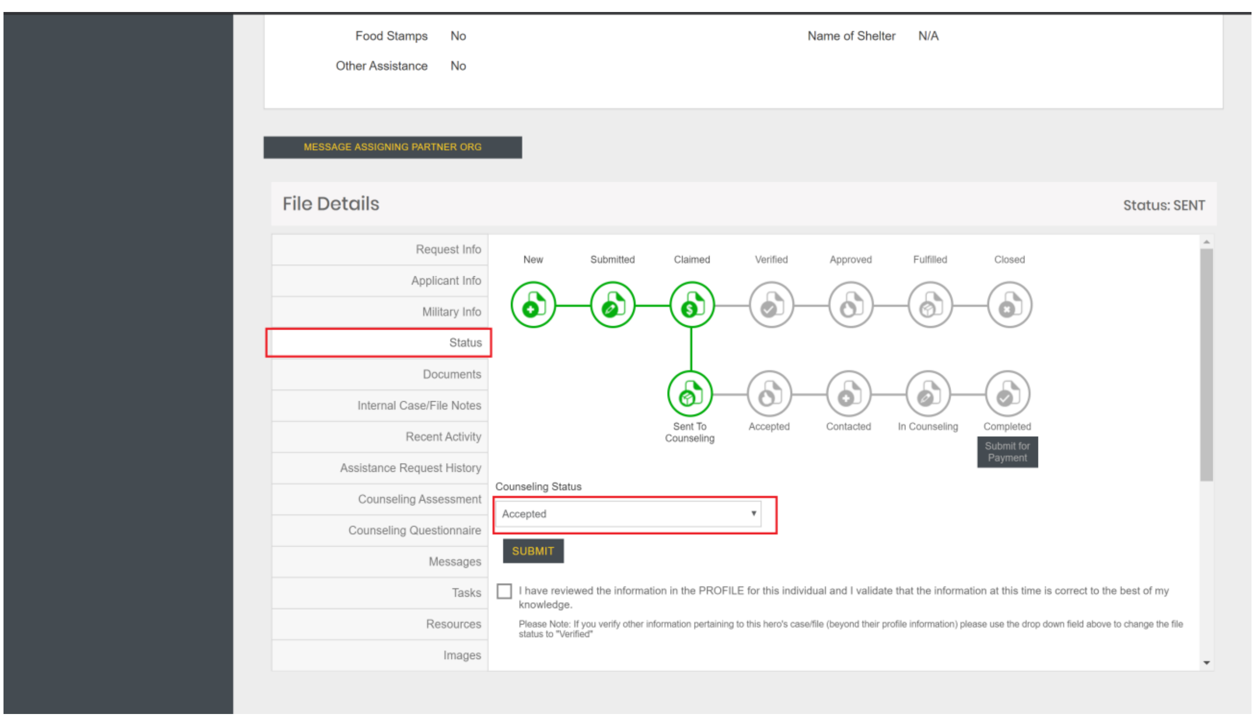
COUNSELING PROCESS & PROTOCOLS:

*Once files begin to be assigned to you, you will see the Clients' names in the File Management Section Table.



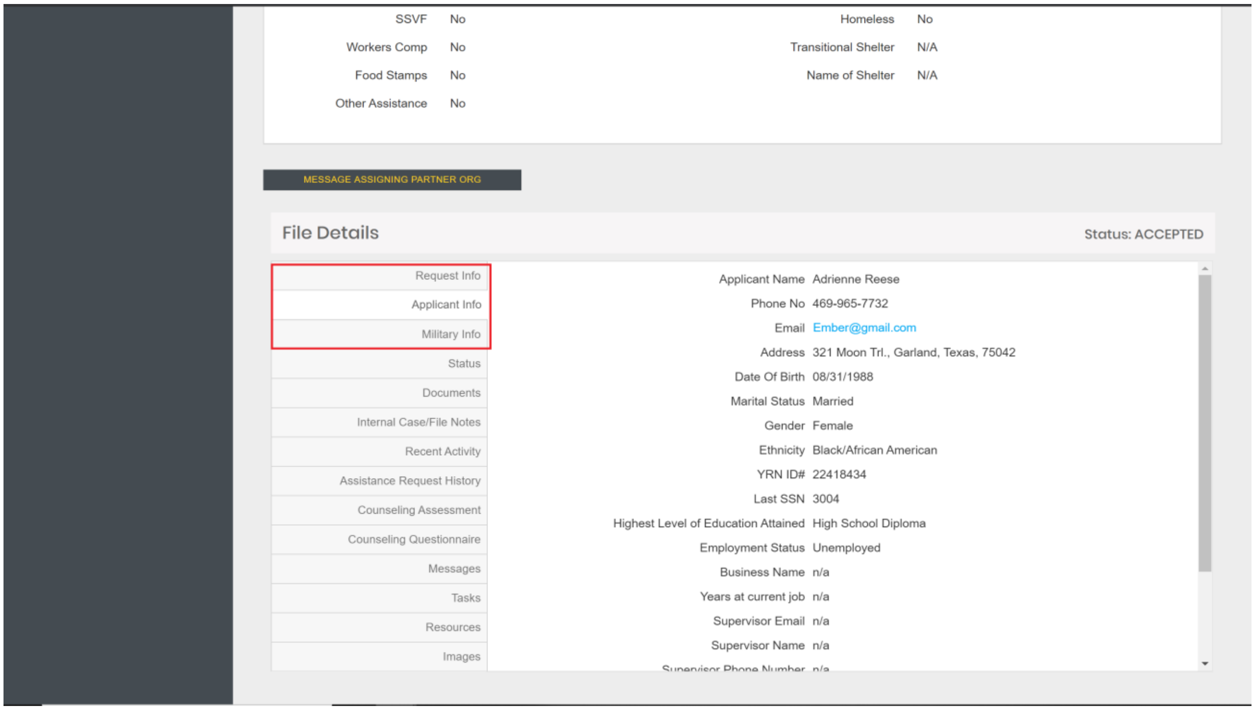
*Click the client's name to bring up their individual file. And scroll through their profile information to get to the tabular section. This is where you will conduct and document your work with the client.

*Change the Status to Accepted via the drop down in the Status Tab.

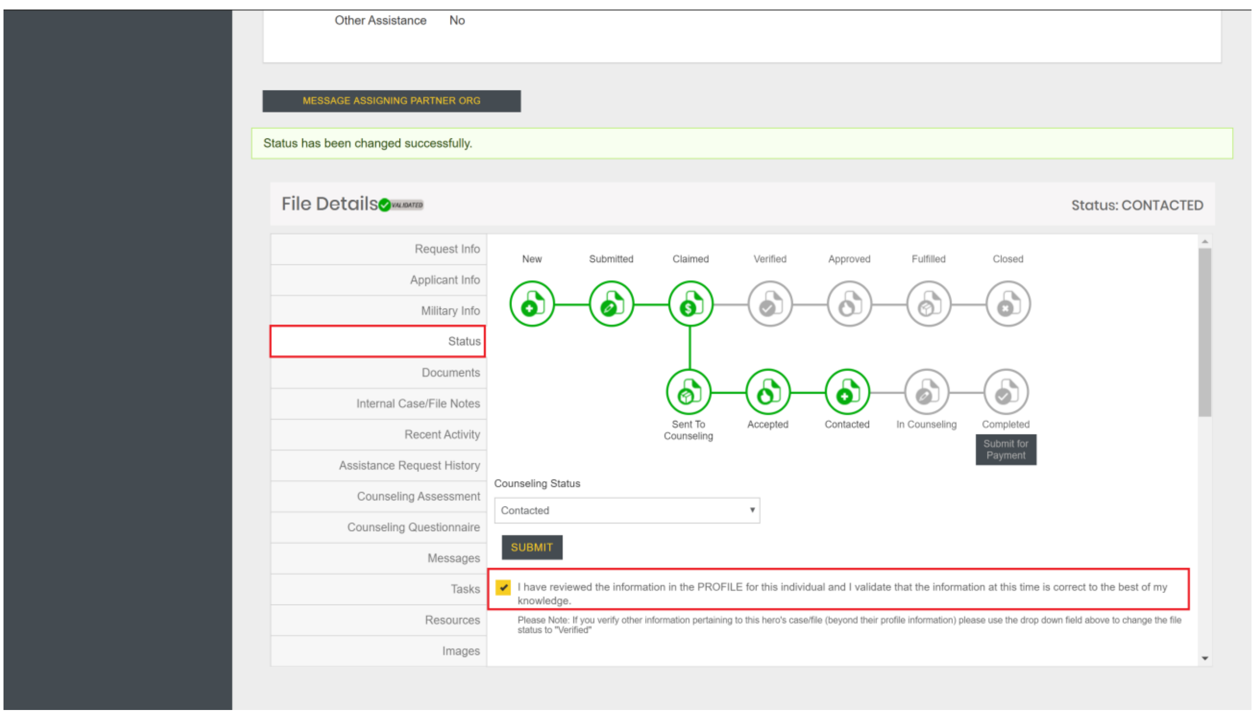


*You will find the extensive profile information on the first 3 tabs, including the client's contact info

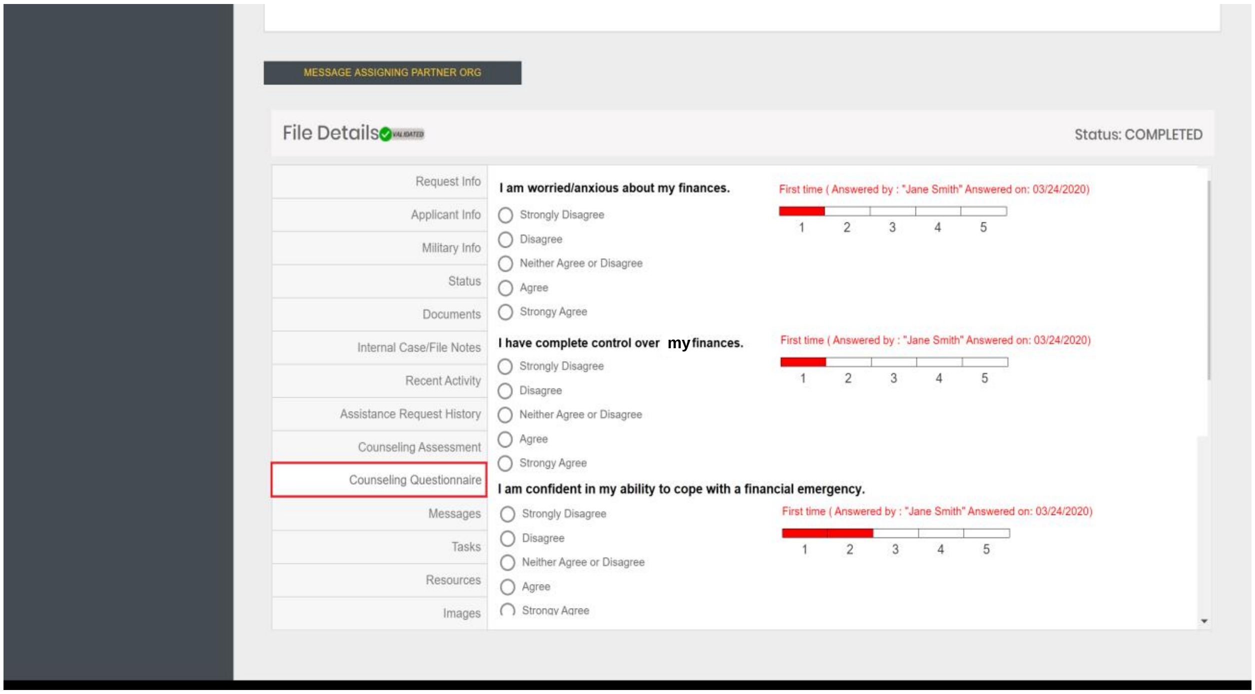
PLEASE NOTE: The system does not yet have a communication platform beyond the messaging feature. You will need to contact the client by your own preferred means (phone, chat and/or videoconference/screenshare service(s)).



*Verify the clients profile information with them and click the box once satisfied in the Status Tab.

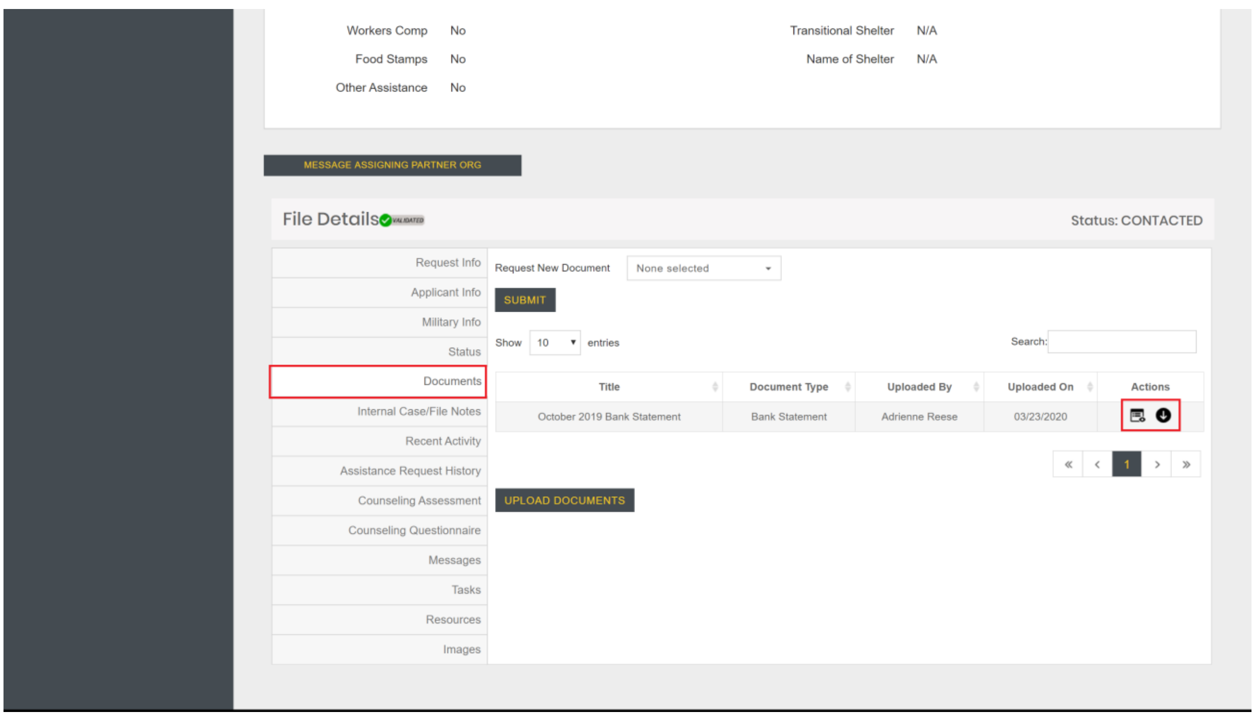


*Conduct the Pre-Counseling Survey with the client located on the Counseling Questionnaire Tab.



*You can view any pertinent documents the client has shared with you as part of the counseling process via the Documents Tab. You may also request the client share additional documents by using the drop down box on the tab.

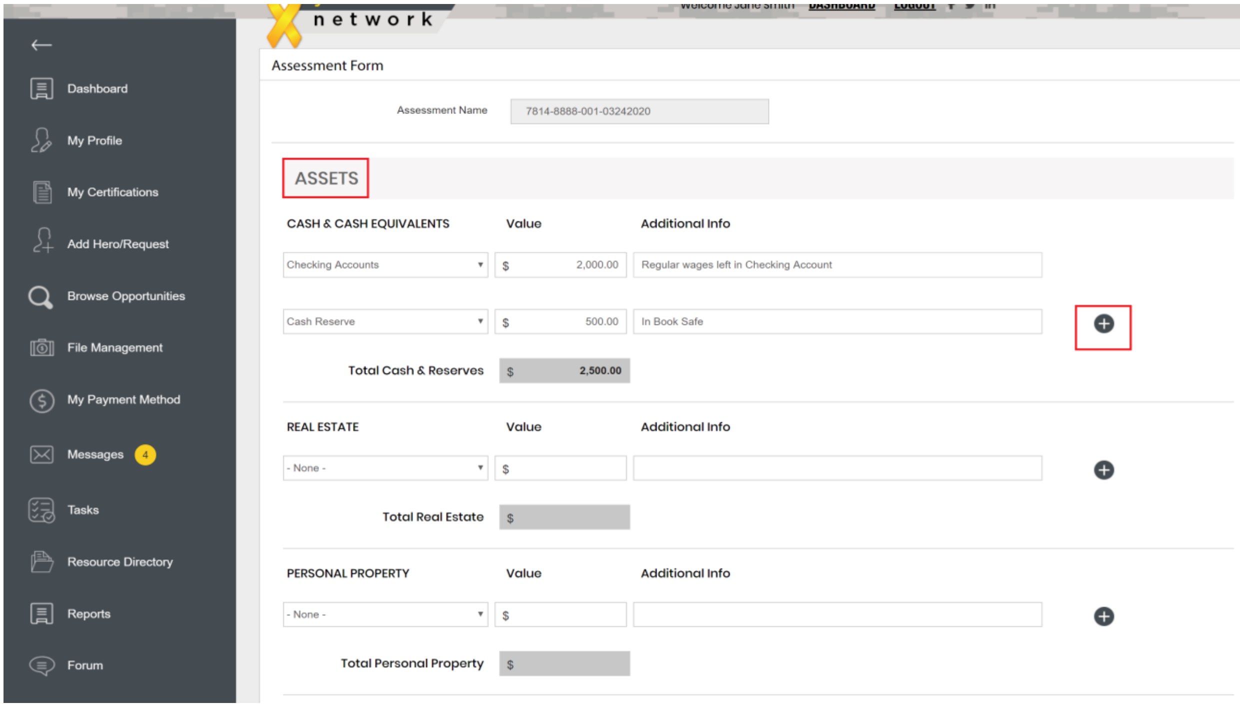
PLEASE NOTE: The YRN is a HIPPA Compliant system; so we suggest that all document shares be done this way rather than emailing or sharing by other unsecure methods.



*Conduct the in-depth counseling assessment via the Counseling Assessment Tab by clicking the Add Assessment button.

*Use the sections to annotate assets, liabilities, income, and expenses. If more fields are needed in any given section, you can add them by clicking the "+" sign at any time.

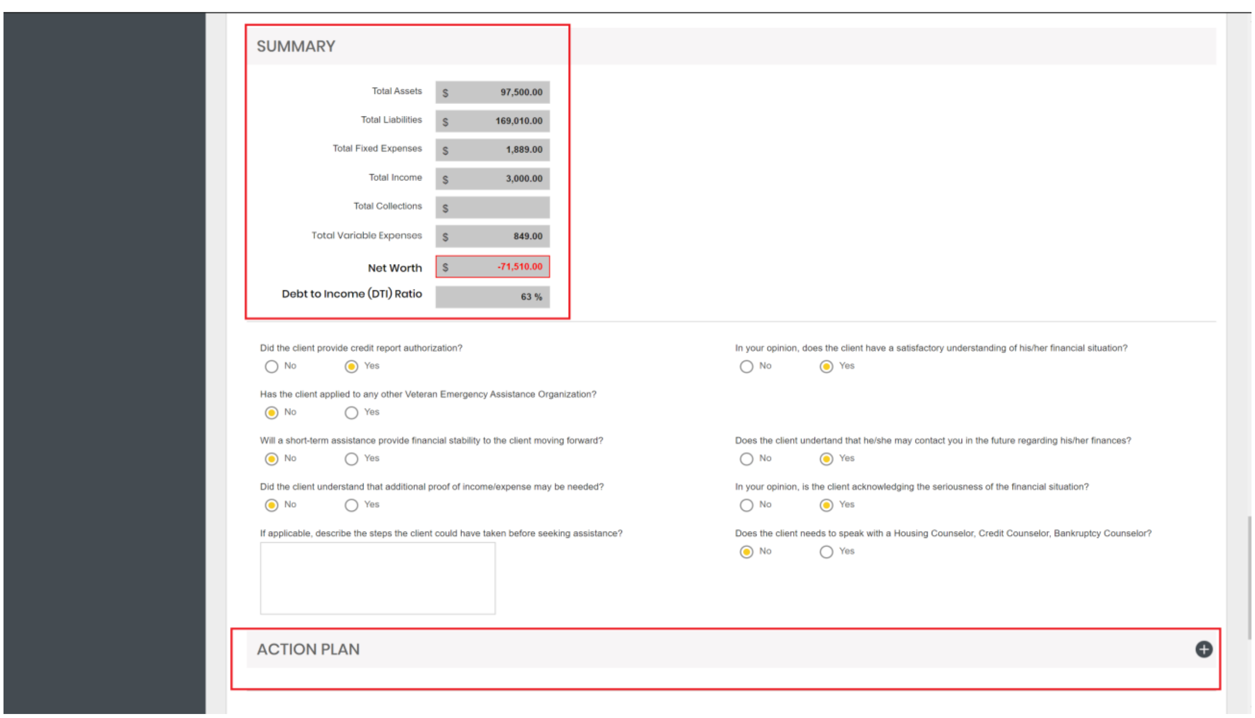
PLEASE NOTE: The grayed boxes are formulaic and cannot be manipulated.



*Once all sections are completed a summary is visible that expresses the totals of the various sections and reveals the client's net worth and debt to income ratio.

*You are also able to assign tasks as part of the Assessment Action Plan to help your client follow up on their own following counseling.

PLEASE NOTE: This is visible to the client in their My Requests Section details and Task Section.

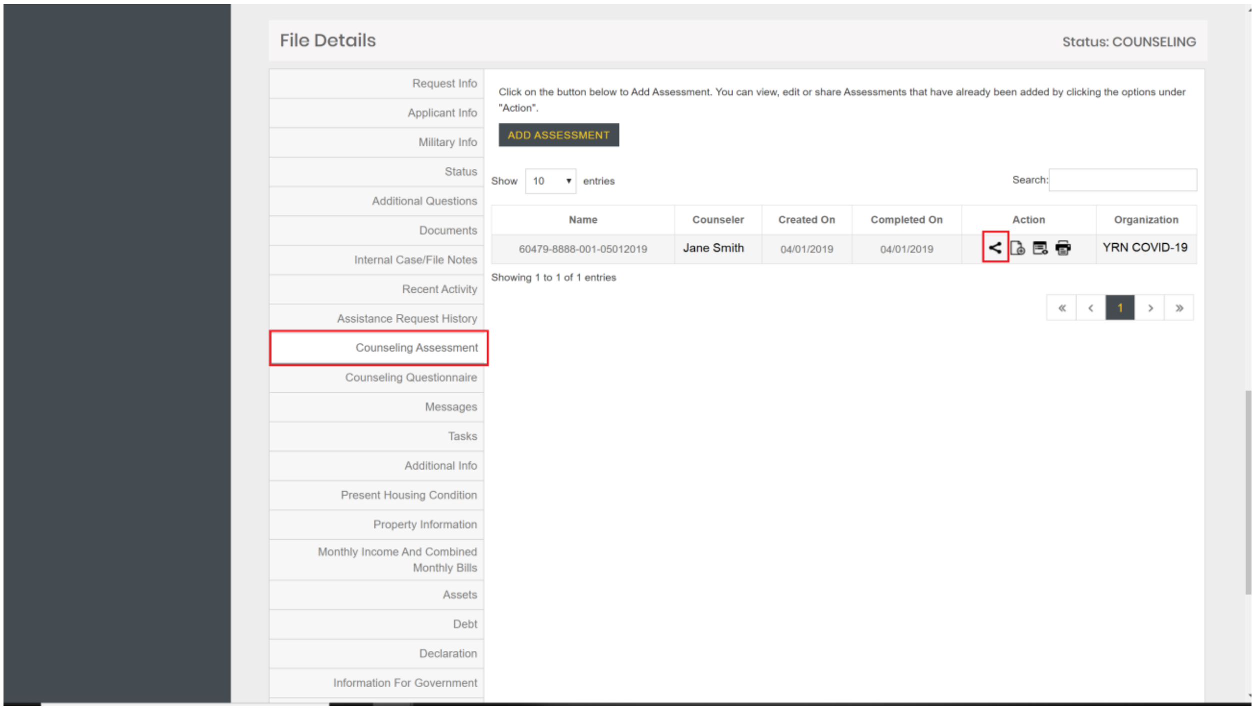


*Once you have marked the Assessment complete and saved it, it will populate the Counseling Assessment Tab.

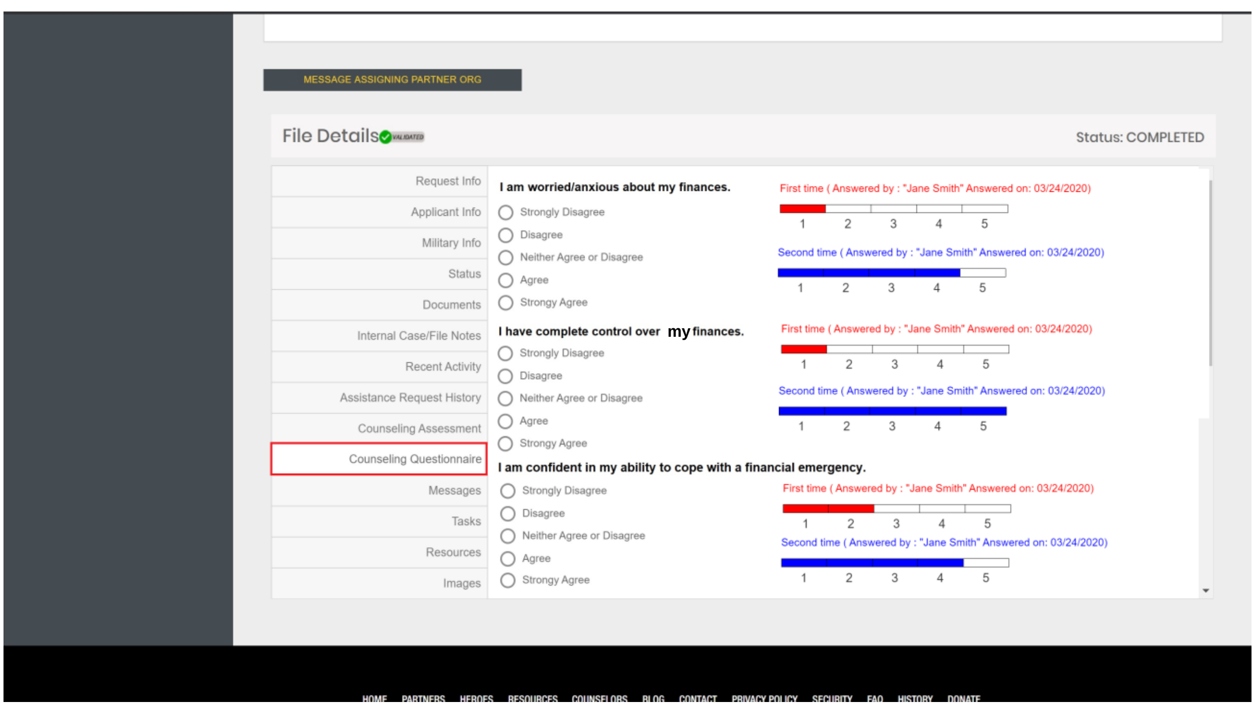
PLEASE NOTE: Due to security measures and amount of data, the saving of the Assessment can take several minutes. Do not hit the browser back button or close the window at any time.

*You can review it at any time and also share it with the client via the share icon if desired.

PLEASE NOTE: Clients are also given a My Budget Section in their log in, where they can get free credit scores, and create Self-Assessments and monthly budgets. Please make them aware of that section! Counselors will NOT pull credit scores as part of the counseling.

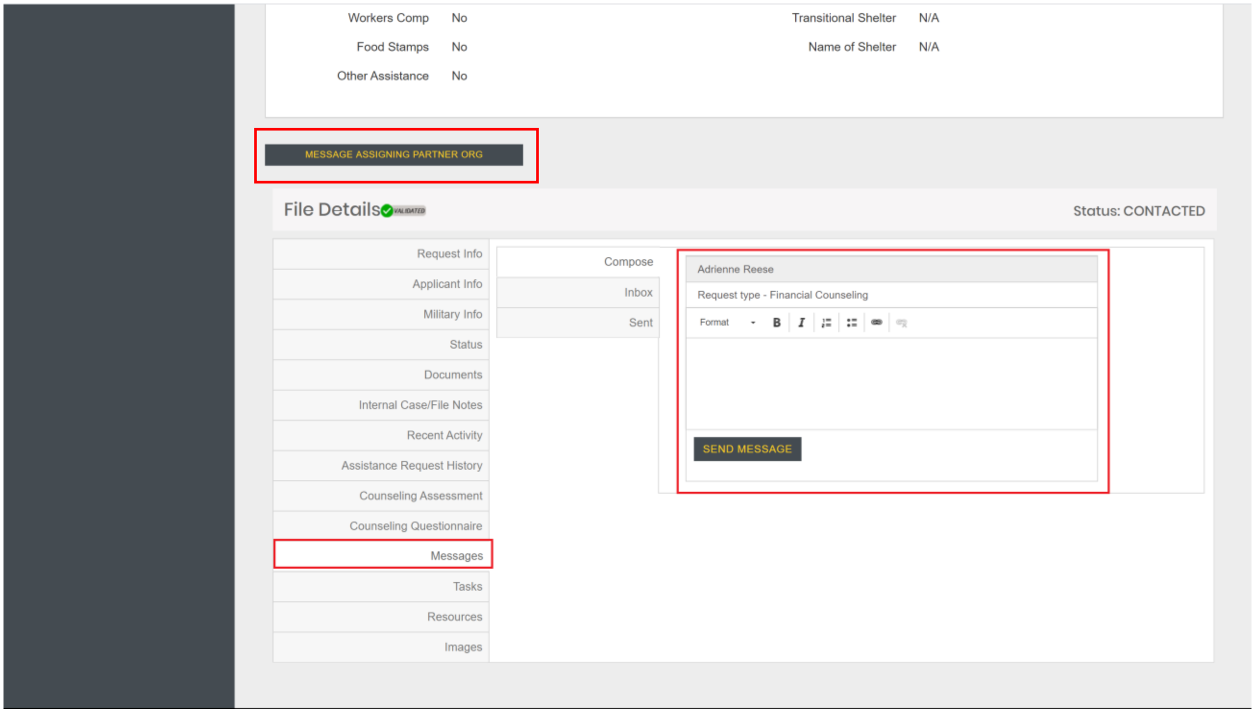


*Conduct the Post-Counseling Questionnaire to track qualitative progress. This should happen when you close the meeting with the client - if you are only planning to meet with them once. We want to measure progress from beginning to end



*If you need to message the client OR the Task Force Leadership at any time you can do so via the Messages Tab and by using the Message Assigning Org button.

PLEASE NOTE: If a client is unresponsive or ceases counseling for any reason please let us know via the Message Assigning Partner button. Then, Place the client Status to "Admin Hold" via the Status Tab. We will assign you a new client.

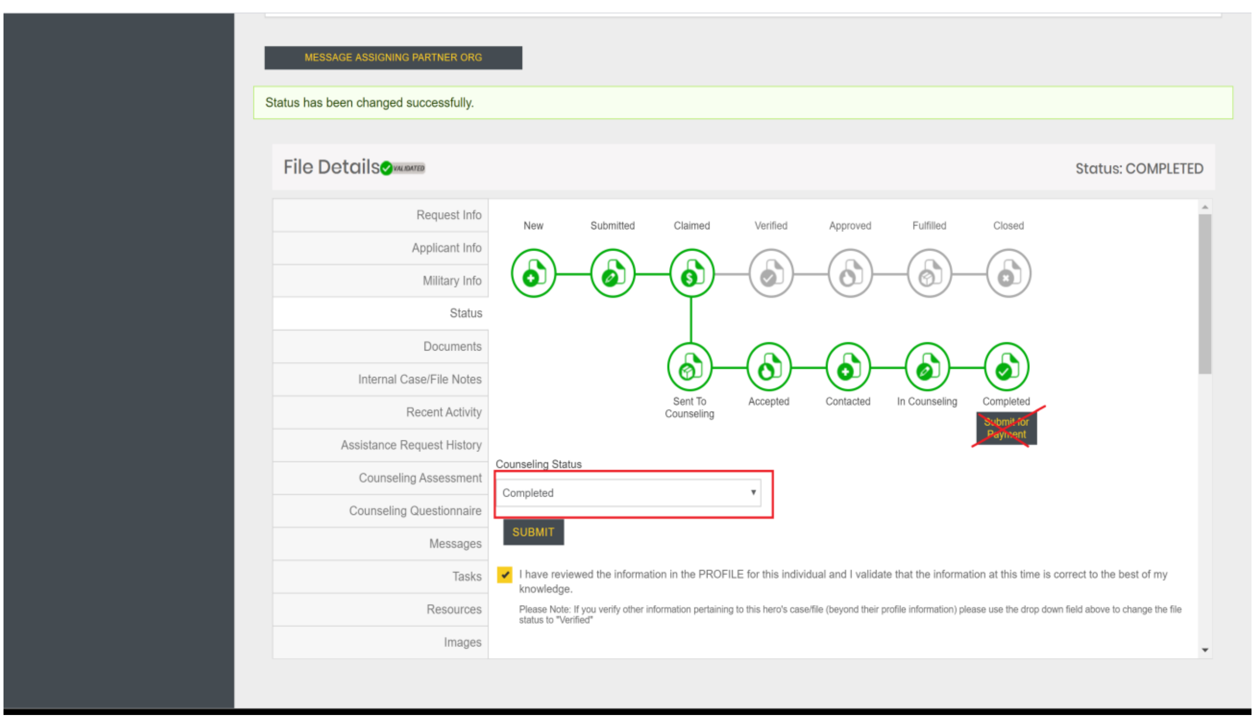


*Feel free to use the other tabs provided as needed (Notes, Tasks, etc), and always update the status of the file via the status tab as you go. Statuses will be reflected on your Dashboard graph as well.

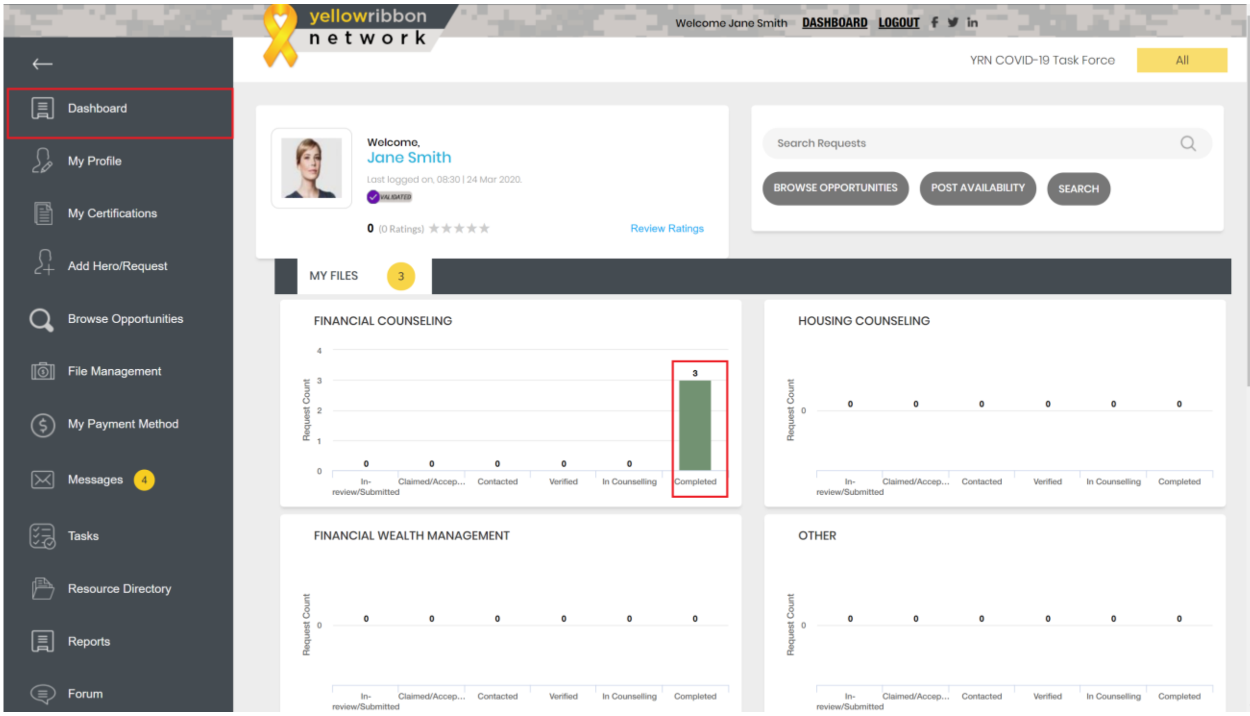
PLEASE NOTE: There is no need to inform anyone of your progress. Data is being collected and shared with the Task Force Leadership and AFCPE HQ behind the scenes.

*Once you have completed a counseling successfully, change the status to Completed in the status tab.

PLEASE NOTE: The client will no longer show on the File Management Table. To view a completed (or Admin Hold) file, you'll need to click the Closed Files button above the table.

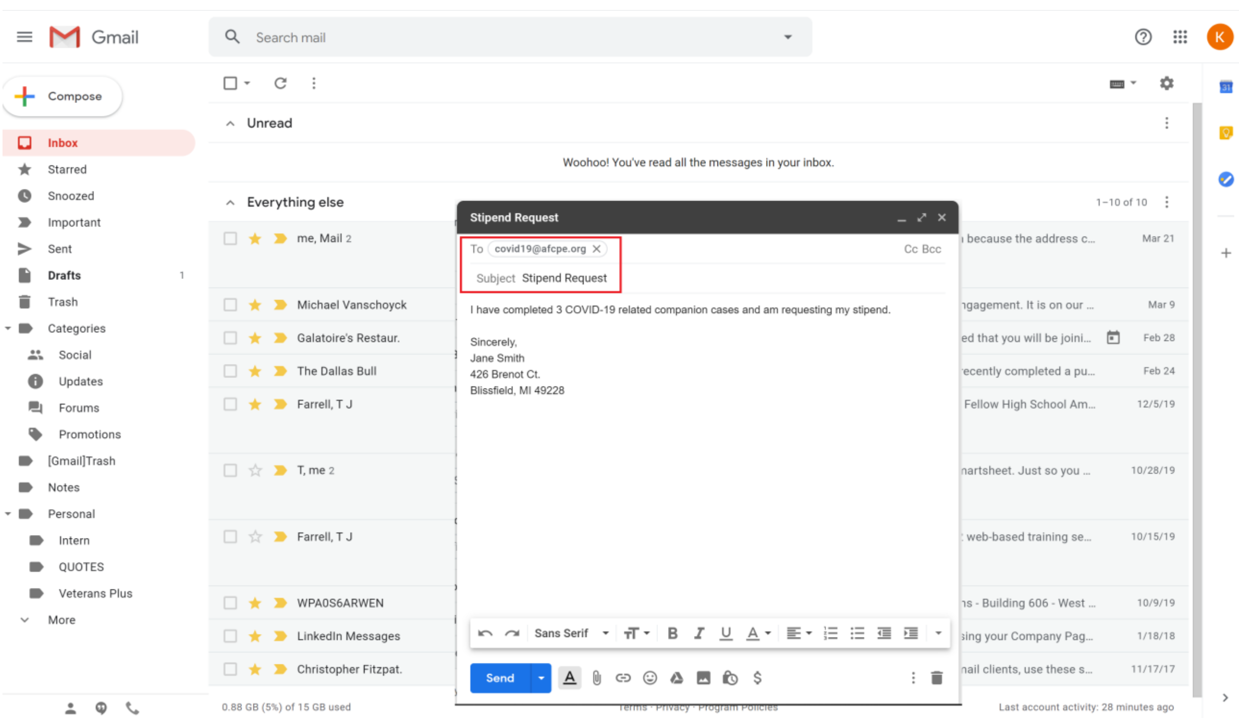


*Once you have 3 files showing in the Completed column of your Dashboard Graph; submit for stipend payment as directed below:



*After completing 3 counseling sessions, please send an email to covid19@afcpe.org with the Subject Line: Stipend Request to alert AFCPE staff of your completion. After verification, a stipend of $150.00 will be mailed to you within 14 business days of completion.

PLEASE NOTE: The check will be made out in your name and sent to the address you entered in your YRN platform profile.



*If you wish to complete more than 3 counselings and earn an additional $20.00 per completed session, please contact the Task Force Leadership via email at vpadmin@veteransplus.org to receive further instructions on case assignment and additional compensation instructions.

For any/all questions on the use of the network please email vpadmin@veteransplus.org.