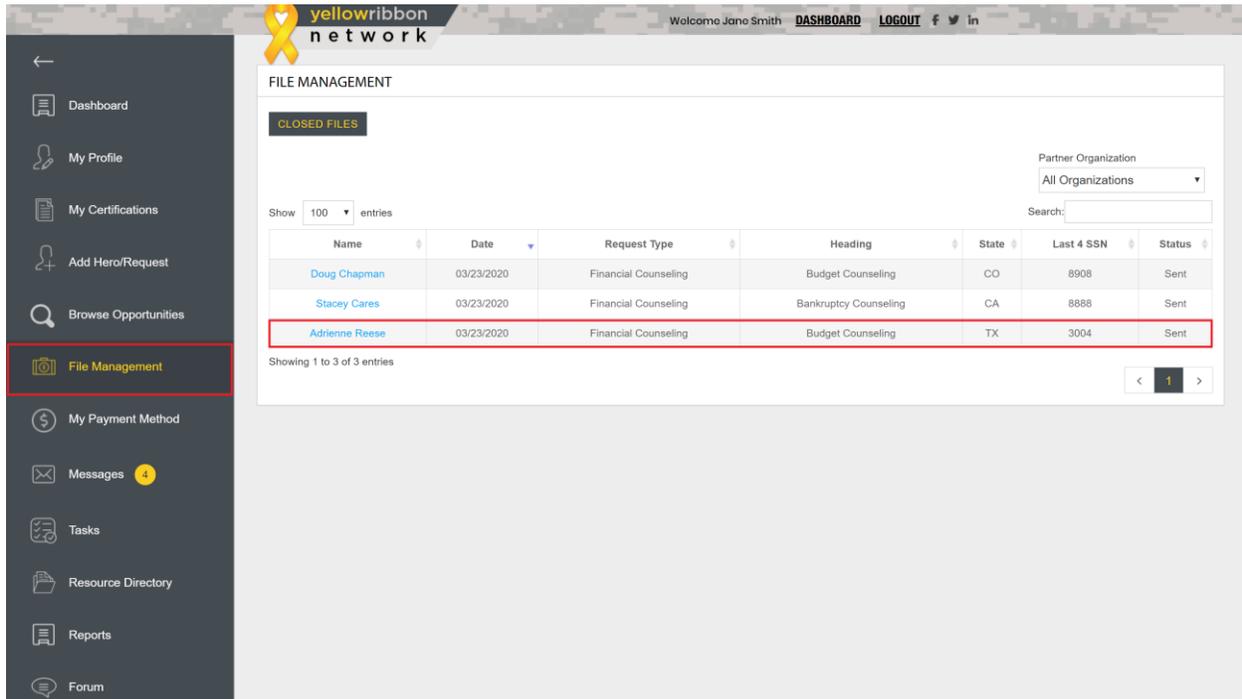


## COUNSELING PROCESS & PROTOCOLS:

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



**FILE MANAGEMENT**

**CLOSED FILES**

Partner Organization: All Organizations

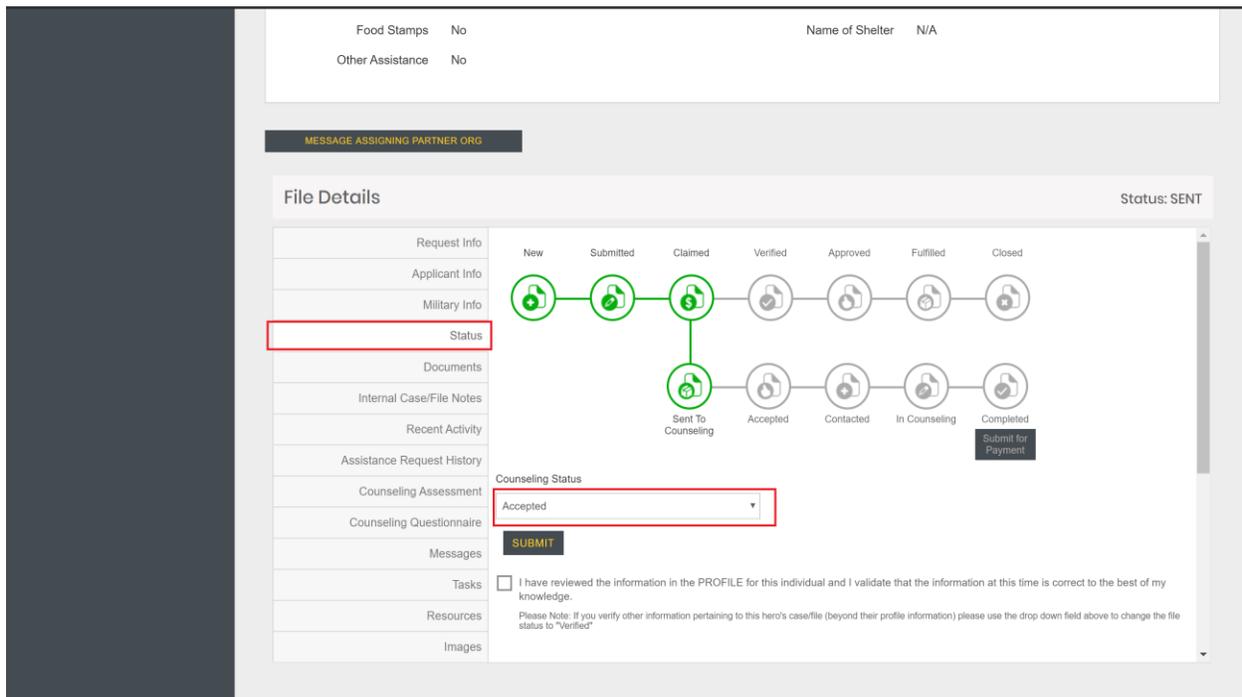
Show 100 entries

Name	Date	Request Type	Heading	State	Last 4 SSN	Status
Doug Chapman	03/23/2020	Financial Counseling	Budget Counseling	CO	8908	Sent
Stacey Cares	03/23/2020	Financial Counseling	Bankruptcy Counseling	CA	8888	Sent
Adrienne Reese	03/23/2020	Financial Counseling	Budget Counseling	TX	3004	Sent

Showing 1 to 3 of 3 entries

\*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.



Food Stamps No      Name of Shelter N/A

Other Assistance No

**MESSAGE ASSIGNING PARTNER ORG**

**File Details**      Status: SENT

Request Info	New	Submitted	Claimed	Verified	Approved	Fulfilled	Closed
Applicant Info							
Military Info							
Status							
Documents							
Internal Case/File Notes							
Recent Activity							
Assistance Request History							
Counseling Assessment							
Counseling Questionnaire							
Messages							
Tasks							
Resources							
Images							

Counseling Status: Accepted

**SUBMIT**

I have reviewed the information in the PROFILE for this individual and I validate that the information at this time is correct to the best of my knowledge.

Please Note: If you verify other information pertaining to this hero's case/file (beyond their profile information) please use the drop down field above to change the file status to "Verified"

\*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)).

SSVF No Homeless No  
Workers Comp No Transitional Shelter N/A  
Food Stamps No Name of Shelter N/A  
Other Assistance No

MESSAGE ASSIGNING PARTNER ORG

**File Details** Status: ACCEPTED

Request Info	Applicant Name	Adrienne Reese
Applicant Info	Phone No	469-965-7732
Military Info	Email	<a href="mailto:Ember@gmail.com">Ember@gmail.com</a>
Status	Address	321 Moon Trl., Garland, Texas, 75042
Documents	Date Of Birth	08/31/1988
Internal Case/File Notes	Marital Status	Married
Recent Activity	Gender	Female
Assistance Request History	Ethnicity	Black/African American
Counseling Assessment	YRN ID#	22418434
Counseling Questionnaire	Last SSN	3004
Messages	Highest Level of Education Attained	High School Diploma
Tasks	Employment Status	Unemployed
Resources	Business Name	n/a
Images	Years at current job	n/a
	Supervisor Email	n/a
	Supervisor Name	n/a
	Supervisor Phone Number	n/a

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

Other Assistance No

MESSAGE ASSIGNING PARTNER ORG

Status has been changed successfully.

**File Details** Status: CONTACTED

New Submitted Claimed Verified Approved Fulfilled Closed

Sent To Counseling Accepted Contacted In Counseling Completed Submit for Payment

Counseling Status: Contacted

**SUBMIT**

I have reviewed the information in the PROFILE for this individual and I validate that the information at this time is correct to the best of my knowledge.

Please Note: If you verify other information pertaining to this hero's case/file (beyond their profile information) please use the drop down field above to change the file status to "Verified"

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

MESSAGE ASSIGNING PARTNER.ORG

File Details UNEDITED Status: COMPLETED

Request Info

Applicant Info

Military Info

Status

Documents

Internal Case/File Notes

Recent Activity

Assistance Request History

Counseling Assessment

**Counseling Questionnaire**

Messages

Tasks

Resources

Images

**I am worried/anxious about my finances.** First time ( Answered by : "Jane Smith" Answered on: 03/24/2020)

Strongly Disagree  Disagree  Neither Agree or Disagree  Agree  Strongly Agree

**I have complete control over my finances.** First time ( Answered by : "Jane Smith" Answered on: 03/24/2020)

Strongly Disagree  Disagree  Neither Agree or Disagree  Agree  Strongly Agree

**I am confident in my ability to cope with a financial emergency.** First time ( Answered by : "Jane Smith" Answered on: 03/24/2020)

Strongly Disagree  Disagree  Neither Agree or Disagree  Agree  Strongly Agree

\*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.

Workers Comp No Transitional Shelter N/A

Food Stamps No Name of Shelter N/A

Other Assistance No

MESSAGE ASSIGNING PARTNER.ORG

File Details UNEDITED Status: CONTACTED

Request Info

Applicant Info

Military Info

Status

**Documents**

Internal Case/File Notes

Recent Activity

Assistance Request History

Counseling Assessment

Counseling Questionnaire

Messages

Tasks

Resources

Images

Request New Document None selected

**SUBMIT**

Show 10 entries Search:

Title	Document Type	Uploaded By	Uploaded On	Actions
October 2019 Bank Statement	Bank Statement	Adrienne Reese	03/23/2020	

**UPLOAD DOCUMENTS**

« < 1 > »

\*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.

Assessment Form

Assessment Name 7814-8888-001-03242020

**ASSETS**

CASH & CASH EQUIVALENTS	Value	Additional Info
Checking Accounts	\$ 2,000.00	Regular wages left in Checking Account
Cash Reserve	\$ 500.00	In Book Safe
<b>Total Cash &amp; Reserves</b>	<b>\$ 2,500.00</b>	

REAL ESTATE	Value	Additional Info
- None -	\$	
<b>Total Real Estate</b>	<b>\$</b>	

PERSONAL PROPERTY	Value	Additional Info
- None -	\$	
<b>Total Personal Property</b>	<b>\$</b>	

\*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.

**SUMMARY**

Total Assets	\$ 97,500.00
Total Liabilities	\$ 169,010.00
Total Fixed Expenses	\$ 1,889.00
Total Income	\$ 3,000.00
Total Collections	\$
Total Variable Expenses	\$ 849.00
<b>Net Worth</b>	<b>\$ -71,510.00</b>
<b>Debt to Income (DTI) Ratio</b>	<b>63 %</b>

Did the client provide credit report authorization?  
 No  Yes

In your opinion, does the client have a satisfactory understanding of his/her financial situation?  
 No  Yes

Has the client applied to any other Veteran Emergency Assistance Organization?  
 No  Yes

Does the client understand that he/she may contact you in the future regarding his/her finances?  
 No  Yes

Will a short-term assistance provide financial stability to the client moving forward?  
 No  Yes

In your opinion, is the client acknowledging the seriousness of the financial situation?  
 No  Yes

Did the client understand that additional proof of income/expense may be needed?  
 No  Yes

Does the client need to speak with a Housing Counselor, Credit Counselor, Bankruptcy Counselor?  
 No  Yes

If applicable, describe the steps the client could have taken before seeking assistance?

**ACTION PLAN**

\*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.

File Details Status: COUNSELING

Request Info  
Applicant Info  
Military Info  
Status  
Additional Questions  
Documents  
Internal Case/File Notes  
Recent Activity  
Assistance Request History  
**Counseling Assessment**  
Counseling Questionnaire  
Messages  
Tasks  
Additional Info  
Present Housing Condition  
Property Information  
Monthly Income And Combined Monthly Bills  
Assets  
Debt  
Declaration  
Information For Government

Click on the button below to Add Assessment. You can view, edit or share Assessments that have already been added by clicking the options under "Action".

**ADD ASSESSMENT**

Show 10 entries Search:

Name	Counselor	Created On	Completed On	Action	Organization
60479-8888-001-05012019	Jane Smith	04/01/2019	04/01/2019		YRN COVID-19

Showing 1 to 1 of 1 entries

\*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

MESSAGE ASSIGNING PARTNER ORG

File Details Status: COMPLETED

**I am worried/anxious about my finances.** First time ( Answered by : "Jane Smith" Answered on: 03/24/2020)  
 Strongly Disagree  
 Disagree  
 Neither Agree or Disagree  
 Agree  
 Strongly Agree

**I have complete control over my finances.** First time ( Answered by : "Jane Smith" Answered on: 03/24/2020)  
 Strongly Disagree  
 Disagree  
 Neither Agree or Disagree  
 Agree  
 Strongly Agree

**I am confident in my ability to cope with a financial emergency.** First time ( Answered by : "Jane Smith" Answered on: 03/24/2020)  
 Strongly Disagree  
 Disagree  
 Neither Agree or Disagree  
 Agree  
 Strongly Agree

\*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.

Workers Comp No Transitional Shelter N/A  
Food Stamps No Name of Shelter N/A  
Other Assistance No

**MESSAGE ASSIGNING PARTNER ORG**

File Details VIEW PROFILE Status: CONTACTED

Request Info  
Applicant Info  
Military Info  
Status  
Documents  
Internal Case/File Notes  
Recent Activity  
Assistance Request History  
Counseling Assessment  
Counseling Questionnaire  
**Messages**  
Tasks  
Resources  
Images

Compose  
Inbox  
Sent

Adrienne Reese  
Request type - Financial Counseling  
Format - **B** **I**

**SEND MESSAGE**

\*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.

**MESSAGE ASSIGNING PARTNER ORG**

Status has been changed successfully.

File Details VIEW PROFILE Status: COMPLETED

New Submitted Claimed Verified Approved Fulfilled Closed

Sent To Counseling Accepted Contacted In Counseling Completed

~~Submit for Payment~~

Counseling Status  
Completed

**SUBMIT**

I have reviewed the information in the PROFILE for this individual and I validate that the information at this time is correct to the best of my knowledge.  
Please Note: If you verify other information pertaining to this hero's case/file (beyond their profile information) please use the drop down field above to change the file status to "Verified"

\*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](mailto: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](mailto: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](mailto:vpadmin@veteransplus.org).