Refugee Support Services Web Tool User Guide

Database for Refugee Support Services

May 2020
The Refugee Support Services web tool was designed to track all required information related to client services and outcomes in the Ohio Refugee Support Services (RSS) programs. The goals of this database include: efficient data collection, accurate client information and program participation, data quality improvement, and query and report development.

This guide serves as a training tool and desk aid to reference using the web tool.

The web tool utilizes Salesforce software and is accessed through the State of Ohio portal, MyOhio.gov. Ohio has a designated number of licenses for users. Each region that provides RSS has a set number of users for their region. Due to the restricted number of users, more users cannot be added.

If an issue arises please contact refugee services staff and we will assist you.

<table>
<thead>
<tr>
<th>Jennifer Johnson</th>
<th><a href="mailto:Jennifer.Johnson@jfs.ohio.gov">Jennifer.Johnson@jfs.ohio.gov</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandy Hollingsworth</td>
<td><a href="mailto:Sandra.Hollingsworth@jfs.ohio.gov">Sandra.Hollingsworth@jfs.ohio.gov</a></td>
</tr>
</tbody>
</table>
Log-in
Go to myohio.gov

Note: Use Chrome as browser

OHID User ID: Enter your assigned 7-digit ID
Password: Your created password

Passwords must be X characters and include the following:
1 upper case
1 number
1 character

Passwords Guidelines:

✔ Must be at least 12 characters in length
✔ Must contain 1 character from each of the following categories:
  o Upper case letters (A-Z)
  o Lower case letter (a-z)
  o Numbers (0-9)
  o Special characters (!#$%^&*()_+-=<{}[]\';/:?`)
✔ Cannot be similar to previously used passwords
✔ Cannot include your first name, last name, username, or OH|ID
✔ Can only be changed once per hour
✔ Passwords expire after 60 days
Log-in
User will see this page.
Select My Workspace

Select Applications
Login
Select Refugee Support Services Tile.
Landing Page
Selecting Home will bring user here.

Household: Selecting will display all households in your region. User can create new households.

Refugee Search: Search of existing refugee or a way to create a new household.

Notifications: State users can display statewide news or reminders about Refugee Support Services to providers throughout the state.

Open Tasks: Open tasks (reminders) such as 90 day follow up or created by internal user.

Bell symbol: Will show number of 90-day follow up tasks to be completed.

Chatter: Communication tool.

Note: After 30 minutes of no activity, the system will time out and go back to the previous application page.
Refugee Search
The Refugee Search screen will be used most by users to:

- Search for existing refugees in the system
- Add new refugees in the system
Refugee Search
There are two ways to search for a refugee depending on the information the user has.

- Alien Number: If used, no other fields need to be required.

- No Alien number: First Name/Last Name are required. IF used must also search by DOB range or DOE range.

**Note:** It is recommended to search using the alien number if possible.

**Note:** “No refugee found” will display when there are no matches.

**Note:** For a user to view a refugee record, the refugee must exist in the system, and reside in the same region as the provider completing the search.

**Note:** If a search is performed on a refugee that does not reside in the same region as the user completing the search the message “Refugee exists in system, please contact the refugee services section for assistance” will display.

Refugee services staff will be able to assist.
Refugee Search
User can begin to add a new refugee via the refugee search to ensure the individual does not currently exist in the tool.

Enter the Alien number and select search.

Message received that refugee not found with following search criteria.
Select NEW HOUSEHOLD
Creating a New Household
User will be brought to the household screen.

Select NEW button to create a new household.

Users may begin creating a new household by not doing a refugee search and selecting the Household tab directly from the home page.
Creating a New Household
Displays list of all resettlement agencies in Ohio. Also lists N/A for those not resettled, and Unk/out of state for secondaries.

Choose agency from drop down and select SAVE

May select SAVE & NEW to add multiple households
Adding a refugee
Household screen created.

Fields:

**Household name** (system generated number)

**Case size**: Number of refugees in household. When first created, case size will be zero.

**Resettlement Agency**: Selected by user.

**Region**: User’s RSS region.

Next step is to add refugee(s) to household.

Select RELATED tab
Adding Refugee
Select NEW
Adding New Refugee:

Refugee Demographics Part 1
Note: All fields marked with a red asterisk (*) are required fields.

You may go back and edit any fields shown, except for alien number.
Adding New Refugee:
Refugee Demographics Part 2.

*NEW FIELDS:

**RCA begin and end date**: Captured for federal reporting

**RCA Termination Reason**: Select reason for termination from dropdown. Required when end date completed. Reasons: Employed, Sanctioned, Withdrew, Loss of Contact, Time Limits

**RCA Reopen**: Yes/No dropdown. Select yes if RCA is ever reopened after it is terminated.

**TANF begin and end date**: Captured for Federal reporting

**Ohio Benefits case number**

**Closure of TANF due to employment**: Yes/No. Required after TANF end date entered

**Interpreter Role**: In-house/contracted

**Household Role**: This optional. Helpful when a full family to identify members.

Options: Husband, Wife, Daughter, Son, Mother, Father, Other

Father
Other
Adding New Refugee:
Refugee Demographics Part 3.

Note: All fields marked with a red asterisk (*) are required fields.

Note: Once alien number is input and saved, it cannot be edited. Contact Refugee Services to correct errors.

Note: Refugee type is Primary/Secondary. If secondary is chosen, previous state is mandatory field. If known, complete date migrated to Ohio field.

Once complete, select SAVE & NEW to save refugee and add another to the HH or SAVE to return to the household screen.
Adding a Refugee

Returning to Household Details

After saving refugee, user is brought back to household detail tab.

To see refugees in household, select related tab.
Refugee added!
User can now add eligibility, services, referrals, and employment
Select the Refugee Number
Refugee Screen
Brings user to detail display which shows entered and saved demographic information for refugee.
User can add/update information.
Two options:
1. Select EDIT button
2. Go to field directly to edit.
To begin adding eligibility, services, referrals, and employment select the related tab.
Refugee Screen

Refugee History: Previous households

User can view or input new:

- Eligibilities (eligibility spans)
- Services
- Referrals
- Employments

Select NEW to add eligibility for refugee
Eligibility
Refugee number will be displayed

Participation type:
Mandatory/Voluntary/Mandatory but exempt

Reason for Exempt: Required when “Mandatory but exempt” is entered

Program: RSS only option

Eligibility begin date & end date
Select SAVE

Note: When an eligibility span is created, a number is created. In this example, ELI-00000113

Note: Eligibility spans for a refugee cannot overlap.

Mandatory recipients: Eligibility span is eight months from the date of arrival.
Voluntary recipients: Eligibility span can be chosen on a case by case basis but should not exceed a year.
ALL SERVICES MUST BE WITHIN THE ELIGIBILITY SPAN DATES

*Note in the example the eligibility span: 4/1/20-11/30/20
Eligibility Tab

Adding Documents

Select Related tab to enter documents

Notes and attachments:

User uploads documents related to refugee:

- Documents used to verify eligibility
- Individual Employability Plan
- Family Self Sufficiency Plan
- Employment verification

Types of files accepted: PDF, JPG, PNG
Limited to 3MB in size

Return to Details tab and select refugee number to being to add services.
Refugee Related Tab

Brings you back to refugee detail page.

Select RELATED tab.

Eligibilities can be viewed.

Select NEW to add Services
Services
All fields are required.

Service provider: Begin to type in the first four letters of the provider name until it pops up, then select.

Note: Users may assign refugees to services with any provider in their region.

*The lead agency in each region is responsible to ensure there is a process in place that allows this.

Service: Select from dropdown list of services

Service start and end dates

Related Eligibility: Service must have a related eligibility span. User will select eligibility span.

Hint: you can see it in the background of the pop up.

Can also type in ELI, hit enter and a pop up with the associated eligibility will appear and user can select the eligibility

ALL SERVICE BEGIN & END DATES MUST BE WITHIN THE BEGIN & END DATES OF THE ELIGIBILITY SPANS
Services
For service details and all services, select VIEW ALL

- Individual Employability Plan (IEP): Must be completed and service input for each employable RSS participant.
- Begin and end dates for this service must be equal to the related eligibility span.
- In the system, the IEP is linked to employment if the employment begins during the IEP service span.
- The link was created to properly capture employments gained by RSS recipients participating in employment services.
- This will ensure any employments input during the service and eligibility span are captured for federal reporting purposes.
**Referrals**

Referrals is a new option.

User will enter referrals completed for anyone in the household.

All fields are mandatory.

Referral options: Legal, Medical, County JFS, Child Care Provider, Food Pantry, Social Security Administration, and Housing.
### Employment

Select NEW to add employment

<table>
<thead>
<tr>
<th>Details</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REF Refugee History (1)</strong></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Field</td>
</tr>
<tr>
<td>4/28/2020 2:45 PM</td>
<td>Created</td>
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<tr>
<td><strong>REF Eligibilities (1)</strong></td>
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<tr>
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<td>Participation type</td>
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<tr>
<td>EU-00000113</td>
<td>Mandatory</td>
</tr>
<tr>
<td><strong>REF Services (1)</strong></td>
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<tr>
<td>REF Services Number</td>
<td>Related Eligibility</td>
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<tr>
<td>SIR-00000188</td>
<td>ELI-00000113</td>
</tr>
<tr>
<td><strong>REF Referrals (1)</strong></td>
<td>New</td>
</tr>
<tr>
<td>REF Referral Number</td>
<td>Referral Agency Name</td>
</tr>
<tr>
<td>REF-00000013</td>
<td>Franklin County JFS</td>
</tr>
<tr>
<td><strong>Employments (0)</strong></td>
<td>New</td>
</tr>
</tbody>
</table>
Employment

All required fields have a red asterisk (*).

- Employment begin date is 5/4/2020.
- In order to have employment captured for Federal reporting, begin date must be within IEP dates.
- This employment will be captured on report as IEP service dates are 4/1/20-11/30/2020.
90 Day Follow Up Service

Once a new employment is entered, user will enter a new service for 90 Day Follow Up

User will select begin date.

End date will be 90 days from begin date.

Select SAVE
Open Tasks
Creating a 90-day Follow-Up Service will create an Open Task on the user’s home screen.

The service input displays with follow up date as August 3.

Previous service input displays in red as it is past the due date.

Five days before the end of the 90 Day Follow Up service end date, a red number will appear next to reminder bell.

Selecting the 90 Day Follow-Up on task will take you to that task.
Open Tasks

Overdue Task: When selected, user may change the due date or add comments.

Open Task: When selected, edits can be made. Comment field is not available.
Activities/Tasks
Activities are tasks or reminders that a user can create that will be connected to the refugee. They are not connected to a service, referral or employment.

From the refugee detail screen, user selects activities tab.

Open activities display current activities. Select NEW TASK to create a new one.

Activity history displays activities that have been completed.
Activities
New task box pop up. All fields except comments are required. User can place any message they wish to use to create a reminder task related to the refugee client.

Priority choices are normal and high (red flag).

Users home screen will show any created tasks with the due date. There are no reminder alerts prior to, on, or after the due date.

User may select task title to take them to the task or mark it as complete.
Chatter

Chatter is part of the Salesforce software application.

It is a communication tool that may be used between users in the same region or between users and state staff.