eLogic Genesis Marketing Data Dictionary

System Navigation Bar

The topmost navigation bar. This bar has a few different features available, which features depend on the staff's Roles and Permissions

Alert System

This is an alert system organizations can use to communicate events or meetings or any custom notifications to any users with their system. This can be used within a network for a parent organization can communicate with their organizations and staff.

People Page

The central repository for all client and staff accounts

Referrals

Organizations can refer clients in a multitude of ways. Referrals can be formulated into a PDF, internal documents and through API's. Organizations using Genesis can both refer client documents as well as the client's themselves giving users the ability to refer clients over a network.

> **Network -** Network referrals allow you to transfer client data to other agencies within the eLogic Network.
> **Internal -** Internal referrals allow you to assign clients to other caseworkers within your organization.
> **Email -** Email referrals allow you to transfer client data to an email of your choice.
> **Quick** - Quick referrals allow you to log your client as having been referred to a specific place.

Permissions

Organizations can set specific interfaces for different roles throughout their organization.

> **Tabs** - Organization sets intake tabs and all other major data areas (Applications, Assessments, Budgets, Casenumbers, Client Reports, Contacts, Education, Employments, Family, Files, Forms, Groups, Notes, Programs. Referrals. Report Management, Report Viewing,Schedule, Services, Trainings)
> **Programs** - Organizations set which Programs users can view or edit or create depending on Agency Settings.
> **Forms** - Organization can organize Intake Data Points into a form with online signatures.
> **Assessments** - Organization can set which assessment a Role has access too.
> **Client Groups** - Organization can set which group of clients they have access too.
> **Reports** - Organization can set which Reports staff have access too.
> **Users** - Organization can set which staff are located to which Role.

Intake Fields

Organizations can set any data points within any intake fields for their database. These can be set by organization within a network to set data standards for an unlimited amount of agencies.

Places Page

The central repository for all employers, referral agencies, and educational institutions

Basic - Agency Information (Contract Name, Contact Email, Website, Contact Number, Site

Address - Address Information (Address 1, Address 2, City, State, Zip, County

Retention - Staff retention Rates (O-30 days, 30-60 days, 60-90 days, 90-120 days, 120 days - ongoing.

Staff - Manage and update staff information (First Name, Last Name, Position, Type, Hourly Wage, Hire Date, Status, Navigator Assigned.

Service - First Name, Last Name, Service, Type, Status, Hour, Cost, Start Date, End Date

Agency Settings

Organizations can set specific rules for their database.

Default Fields - These are fields that autofill when a client is created.

Mandatory Fields - Organizations can limit staff from assessing a client until specific intake fields are generated

Referral Fields - These are intake areas that are used in preset referrals.

Custom Fields - Organizations can set custom intake fields per their organization. The include; Radio Buttons, Checkboxes, Large Text, Small Text, Dropdown

Privacy Fields - Organizations can set Privacy Groups to have specific staff members communicate in private

Reports

The central repository for all agency-wide reports

Report Scheduler

Reports can be set on a timer to run and deliver themselves to selected staff members.

Report Manager

Reports can be assigned to different staff members and roles.

Agency Admin

This will bring the staff to the part of the system that houses all the agency's settings and options.

- Count Employer Wage as Income - Include employment wage on the budget sheet and in other budget calculations. This prevents having to double enter the data, but if it's already been entered on the budget sheet, it will need to be removed to avoid counting it twice.

Use Work Logs - Work Logs are basic client-level logs used to track worksite, hours and pay for basic work log entries.

Report Only My Clients - When enabled, this setting restricts reporting for caseworkers to only their assigned clients. Clients not assigned to the caseworker will not appear in any of their reports.

Parent Reporting Type - This setting determines the accessibility of your data to your parent group in reports. The options are No Reporting, No Identifiable Information (which excludes Names and Casenumbers from being report), or Full Access, which allows reporting on any of your group's data.

Default Next Assessment Date - When finalizing an assessment, the default next assessment date will be the number of months entered from now.

Auto-assign Caseworkers - Automatically assigned caseworkers to a client when they interact with the client's record. A client can have multiple caseworkers assigned.

Hide Employee Records - Prevents non-admins from viewing the records of other employees.

Enable View Access - Allows read-only access to services, programs and forms the user would otherwise not be able to see.

Enable FRC Settings - Enables FRC checkbox settings for Referral and Application in service admin.

Dashboard

Staff can view upcoming events by Navigator(s).

- Assessments
- Services
- Appointments
- Goal Plans (Objective and Steps
- Applications
- Programs
- Meetings
- Events

Global Search

A client and staff profile search engine. Profiles can be located by first or last name, address, phone number, case number, or date of birth.

Client Portal - Client’s can directly access their user account by organization. Portals are defined and structured by the organization.

Reports Notification Icon

Reminders or Notifications to run reports will be displayed here.

User Menu
Drop-down menu includes:
- Notifications
- Outstanding Referrals
- Account Settings
- Personal Notes
- staff calendar
- Logout

Intake Navigation Bar
The Intake Navigation Bar will display different options, depending on where the staff is in the system.

Intake Navigation Bar - *People Page*
Create New Client
Create a new client or employee profile here
Print Forms
Print agency created forms

Groups - Home
Create and manage client Groups. Groups are customizable client cohorts to which Quick Services, Assessment Services, and Programs can be assigned to all clients within the Group with one click.

- Temporary Groups - Groups can be created temporarily for one time bulk assignments.

- Static Groups - Groups are standardized so users can repeat bulk assignments without recreating a clientf cohort.

Solution Center
The question mark icon will take the staff to the Solution Center - an article-based knowledge center which serves as an electronic ticketing system, help desk, user manual, video tutorial home, and feature explanation library.

Grid View
View client profile tiles on the People Page in a grid layout.

List View
View client profiles on the People Page in a list layout.

Main Screen

The part of the screen below the navigation bars that will change as the staff navigates the system.

Main Screen - People Page
___ contacts found - a live count of how many client or navigator profiles that are entered in the system and are currently match all set filters

Groups - Filter
Once clicked, a section below will expand and display each Group that was created under Groups - Home. Each group can be selected which will filter and display only clients who are within that Group's cohort.

Filters
Once clicked, a section below will expand and display different filter options that will filter and display clients who match the filter criteria below:

Sort - reorder how clients are displayed
- Created - oldest created profiles are displayed at the top, newest created profiles at the bottom
- Modified - recently modified profiles are displayed at the top
- Name - profiles are listed in alphabetical order

Type - display only clients who belong in each group
- All - displays all client and staff profiles
- Client - displays only client profiles
- Navigator - displays only staff profiles

Status - display only clients who have the selected status
- All - displays all clients
- Inactive - displays all clients marked as inactive
- Active - displays all clients marked as active
- Closed - displays all clients marked as closed

Programs
- Filter to display clients who are enrolled in selected programs

Employers
- Filter to display clients who have the selected employer/s

Show deleted - when checked, will display all deleted client profiles
Only my clients - when checked, will display only clients assigned to the logged in user
Only HoH - when checked, will display only clients who have been designated as head of household
Only assessed - when checked, will display only clients who have received at least one assessment
With user accounts - when checked, will display only profiles who are designated as organization employees

Profile Information Tile
Each profile tile displays the name, date of birth, past and present employers, caseworkers assigned to the person, any selected warning indicators, designation if person is a Client or Employee, and case number.

Client Profile
Intake Navigation Bar - houses any custom-created intake tabs, Applications, Programs, Employment, Education, Training, Services, and Forms.
Left Sidebar -
Client information box **-** Contains profile name, client or employee designation, case number, profile image, client type drop-down list, created date, status, navigator/s, group/s, options menu.
Contacts
An area to store clients' contacts. Includes Name, Phone, Fax, Email, and Address
Schedule
Calendar - Client's calendar. Shows Upcoming and Past Trainings; Service Check-up, Start, and End dates; Goal Plan Objective Start and Due dates, Goal Plan Step Start and Due dates; Assessments Due.
Quick Meetings - Document a single date to account for a meeting.

Budget - Enter, view, and manage clients' income and expenses
Assessments
Assessments - Conduct, Schedule, Scheduled, and Completed Assessments accessible here
Assessment Scoring - View completed assessments' scores
Assessment HIstory - View assessment Scales, Services, Goal Plans/Projections, Notes
Case History Report - View a single scale's outcomes, direct and referral services assigned to the client, goal plans, and goal plan steps. Option to print for both client and caseworker sign
Files
Personal Files - Upload, manage, and organize clients' private documents
Group FIles - Forms, documents uploaded by the agency administrator are available to all clients here.
Reports
Case History Report - View multiple scales' outcomes, direct and referral services assigned to the client, goal plans, and goal plan steps. Option to print for both client and caseworker sign
Client Summary Report - Summary report of client's intake information
Matrix - Visual representation of outcome scales and movement.
Work Log - Quick way to record client's daily workload.
Transaction Report - View demographic changes made to client profile and by whom
Family
Drop-down List (Only present when client is part of a family unit) - Lists all family members. Select a name to open their profile.
Manage Family - View and interact with clients' family members
Referrals
Refer Data - Send client data to a sibling group (agency) within the eLogic Network, internally to another staff member, via email, or document referring a client as a Quick Referral.
Referral History - View previous referrals made for this client.

Intake Tabs - Customizable tabs which contain demographic information, custom created fields,
Applications tab - Optional feature that enables staff members to see if their client meets requirements to be placed in an organization's program(s).
Programs tab - Optional feature that displays and enables users to interact with an organization's provided programs
Eligibility Calculator - Optional feature that shows programs and/or services for which a client qualifies.
Employment tab
Job Applications - Track a client's job application progress.
Current Employment - View and update a client's current employment and employment wages.
Previous Employment - View and update a client's previous employment and wages.
Hourly Wages - Capture client's current and historical wage income. These Income Sources are connected to the Budget page and calculate a users PoP.
Education tab - Track a client's educational institutions, progress, and degrees/certificates
Trainings tab - Register clients for training sessions, track which they attended and completed.

Services tab - Assign Quick or Scale services, view all service history
Forms tab - Fill out new and store previous forms

Domains
A category or “type” assigned to assessment scales and services

Assessments
Scale - Question or Statement presented in an assessment
Outcome - The response or result given for a scale
Value - The numeric value assigned to an outcome
Assessment Pack - A collection of scales that make up an assessment
Assessment - An instance of an assessment pack assigned to a specific client
Finalize Date - The date the assessment was completed (used for reporting on assessed date)

Goal Plans
Goal Outcome - The desired outcome and focus of the goal plan
Objective - Top-level milestone under a goal plan
Step - Smaller, incremental tasks that make up an objective
Start Date - Date the objective or step should begin
Due Date - Date the objective or step should be completed
Completion Date - Date the step was marked completed

Education
Major - Client Enrollment Major
Enrolled Date - Date client is enrolled
Disenrolled Date - Date client was disenrolled
Graduated Date - Date of graduation
Expected Completion - Date of expected completion
Completed Term - Date of completed term
Credits Earned - Number of credits rarned
Credits Needed - Number of credits needed
Type - Type of Degree
Certification -Length required to complete Major
Grade - Current Grade or GPA for Major
District - District of school
Site - Location of School

Services
Service - A service which the agency wants to track the delivery of
Direct Service - A service given by the agency
Referral Service - A service given by a different agency after referred
Item Group - A collection of services for simpler reporting
Status - Status of the service assignment (approved, denied, n/a)
Hours - The number of hours invested by the agency
Start Date - Date the service started
End Date - Date the service ended

Checkup Date - Date the caseworker should follow up with the client regarding the service
Cost - The cost of providing the service
Quick Service - A service given by the agency that does not require an Assessment be conducted first
Site - The location of the service

Programs
Assigned - Date the program was assigned
Program Type - Type of program (direct, referral, pre-existing)
Site - The location of the program
Start Date - Date the program started
End Date - Date the program ended
Checkup Date - Date the caseworker should follow up with the client regarding the program
Hours - The number of hours invested by the agency
Cost - The cost of enrolling the client in the program
Status - Status of the program assignment (active, eligible, ineligible, pending, waitlisted, inactive)

Reports
System Report - Pre-made eLogic reports available to all organizations.
Custom Report - retrieve and display all reported information in a spreadsheet format.
Ad Hoc Report - comprised of user-generated statements to which rules are attached which allow for targeted, unique, and customized reporting on your organization's client population.
My Report - Reporting area specific to the user. Reports can be organized and assigned to staff members.

Report Filter Options - (*) denotes a date range filter:
Age - Results will include information related to clients of a certain age or within a certain age group
Assessment Pack - Results will include information related to clients who received a specific assessment
Caseworker - Results will include information related to a specific caseworker
Child Groups - Used by Parent Agency Admins who wish to report on their child agencies
Client Status - Results will include information related to clients who have the desired status
Client Type - Results will include information related to clients who have been designated a certain client type
**** Client Assessed*** - Results will include information related to clients who received any assessment within the selected time frame
**** Client Created*** - Results will include information related to clients who were created in the system within a certain time frame
Domain - Results will return the domain(s) selected
Employer - Results will return the employer(s) selected
**** First Assessment*** - Results will include clients who received their first assessment within the selected time frame
**** Note Date*** - Results will take into account the date range of when notes were dated
Percentage of Poverty - Results will include clients who are within a selected Percentage of Poverty range
Program - Results will include information related to the selected program(s)
**** Program Started*** - Results will include information related to when clients started a program
Scale - Results will return the scale(s) selected
Service - Results will include information related to the selected service(s)
**** Service Created*** - Results will include information related to when a service was created
**** Service Started*** - Results will include information related to when a service was started
Training - Results will include information related to the selected training(s)

<u>Custom Report Column Categories:</u>
Demographic - Includes data points pertaining to client demographic information
Assessment - Includes data points pertaining to assessments
Financial - Includes data points pertaining to client budget, income, wage, and credit
Service - Includes data points pertaining to services
Note - Includes data points pertaining to client case notes

Employment - Includes data points pertaining to client employment
Program - Includes data points pertaining to programs
Training Session - Includes data points pertaining to trainings
Outcome Scale - Includes data points pertaining to scales
Movement - Includes data points pertaining to client outcome movement
Custom Fields - Includes data points of your organization's custom created fields

Custom Report Column Options: Demographic
Address
Address 2
Age
Any Employment Wage - *True/False identifying if client has any employment wages in their profile*
Any Goal Plans - *True/False identifying if client has any goal plans in their profile*
Assessed - *True/False identifying if client has received an assessment*
Case Number
Caseworkers - *Caseworkers assigned to each client*
Citizenship
City
Client Type - *User-defined cohorts created by each organization*
County
Created By
Created On
Crime Committed Date
Crime Discharge Date
Date of Birth
Dependent Ages
Dependents 0-5
Dependents 16-24
Dependents 25-65
Dependents 6-15
Dependents 65-100
Dependents Under 18
Disabilities
Disabled Veteran
Education Level
Email
Employers
Ethnicity
Ex-Offender
First Name
Gender
Healthcare

Healthcare Policy #
Household Size
Household Type
Housing
Last Modified
Last Name
Marital Status
Military Status
Mobile Phone
Native Country
Note Hours All
One Way Referrals
Parole
Phone Number
Primary Language
Primary Reassessment
Probation
Programs
Race
Range Note Hours
Referral Source
Secondary Languages
Served in Combat Zone
Sexual Offender
Source of Income Types
Sources of Income Groups
State
Status
Title
Total Hours Logged
US Veteran
Veteran Discharge Date
Violent Offender
Warning Indicators
Work Status
Zip

Custom Report Column Options: Assessment
Assessment Finalize Date
Assessment Pack
Assessment Count
First Time Primary Assessment
First Time Primary Reassessment

Last Assessment Date
Primary Assessment Count

Custom Report Column Options: Financial
Budget Income
Credit Score Decrease
Credit Score Increase
Credit Score Stagnation
Currently Working
Gross Income
Income Wage Decrease
Income Wage Increase
Income Wage Stagnation
Income/Expense Class
Income/Expense Monthly Amount
Income/Expense Type
Income/Expense Type Group
Initial Gross Income
Last Gross Income
Net Income
PoP
Previous Gross Income
Section G Only Income Sources

Custom Report Column Options: Service
Direct Services
Direct Services Yes/No - *Did the client receive any Direct Services?*
Referral Services
Referral Services Yes/No - *Did the client receive any Direct Services?*
Service Assigned By
Service Category
Service Certification Received
Service Checkup Date
Service Completed
Service Cost
Service Created Date
Service Domain
Service End Date
Service Hours
Service Item Group
Service Name
Service Outcome
Service Passed

Service Provider
Service Refused
Service Scales
Service Start Date
Service Status
Service Total Hourly Cost
Service Type

Custom Report Column Options: Note
Note Date
Note Hours
Note Tags
Note Text

Custom Report Column Options: Employment
Active Employment Wage Effective Date
Active Employment Wages
Clicked Has Employer
Employer
Employment Current Hours
Employment Current Wage
Employment Date Left
Employment Drug Test
Employment Health Insurance
Employment Hire Date
Employment Hours per Week
Employment Left Voluntarily
Employment Position
Employment Previous Hours
Employment Previous Wage
Employment Retention
Employment Separation Reason
Employment Shift
Employment Site
Employment Supervisor
Employment Wage Decrease
Employment Wage Increase
Employment Wage Stagnation

Custom Report Column Options: Program
Program
Program Assigned Date
Program Days of Activity

Program End Date
Program Start Date
Program Status

Custom Report Column Options: Training Session
Training Attended
Training Course Name
Training Detail
Training Group
Training Instance Date
Training Month
Training Registered

Custom Report Column Options: Scale
Scale
Scale Assessment Number
Scale Below Prevention Line
Scale Direct Services
Scale Domain
Scale Finalize Date
Scale Outcome
Scale Referral Services

Custom Report Column Options: Movement
Age
Assessment Pack
Caseworker
Child Groups
Client Assessed
Client Created
Client Status
Client Type
Domain
Educational Institution
Employer
First Assessment
Last Change Excluding Notes
Note Date
Percentage of Poverty
Program
Program Started
Scale
Service

Service Created
Service Started
Training

Custom Report Column Options: Custom Fields
(Options vary for each organization)

Ad Hoc Reports - Reports with user developed statements and rules to which the report will query against.
Statements - User-created sentences to which users assign rules.
Rules - define which data points will be included in the report results.

Ad Hoc Report Rule Categories
Assessment
Custom Field
Demographic
Financial
Goal Plans
Services

Ad Hoc Rule Options
Category: Assessment
Outcome Placement - retrieves results for clients who have selected a specific Domain, Scale outcome on a previous assessment.
Outcome Movement Positive - retrieves results for clients who have demonstrated positive movement captured by previous assessments.
Outcome Movement Negative - retrieves results for clients who have demonstrated negative movement captured by previous assessments.
Outcome Stagnation - retrieves results for clients who have demonstrated no movement captured by previous assessments.
Assessment - retrieves results based on how many of the selected assessments the client has taken.

Category: Custom Fields Rules
All custom fields are available here as True/False or selection rules

Category: Demographics Rules
All demographic fields are available here as True/False or selection rules

Category: Financial Rules
Income Source Increase - retrieves clients who have documented any increase in their income source.

Income Source Decrease - retrieves clients who have documented any decrease in their income source.
Income Source Stagnation - retrieves clients who have documented no change to their income source.
Employment Wage Increase - retrieves clients who have documented any increase in their employment wages.
Employment Wage Decrease - retrieves clients who have documented any decrease in their employment wages.
Employment Wage Stagnation - retrieves clients who have documented no change to their employment wages.
Income Source Exclusion - retrieves clients who have no income entered directly into any Income Groups under their Budget screen

Category: Goal Plans Rules
Has Goal Plan - retrieves clients who have a Goal Plan documented in Genesis
No Goal Plan - retrieves clients who do not have a Goal Plan documented in Genesis

Category: Services Rules
Service Selection - retrieves clients who have received a specific service
Service Exclusion - retrieves clients who have not received any services
Service Wildcard - retrieves clients who have received any service. This can be for any service in any Domain or any service within a specific Domain(s).