Employment Readiness Scale™
Shared Clients Functionality

TERMINOLOGY

- o "Shared" – clients willing to have ERS data viewed by all linked agencies
- o "Tagged" – clients being worked with by more than the original agency
- o "Non-tagged" – clients being worked with only by the original agency
- o "Original agency" – the agency who first set up the client to take the ERS

FUNCTIONALITY FOR LINKED AGENCIES

- o Agencies can search ("Shared non-tagged clients") for clients who were not originally theirs and then "tag" them.
- o Agencies can also search/display their database by "Original and tagged clients," "Only original clients," "Only tagged clients," and "Only original non-tagged clients." Any tagged clients listed will have a light orange background.
- o Client Coding variables and Local Programs are defined at the Sponsor level for all linked agencies (any previous coding is deleted).
- o If clients retake the ERS at another agency in the group, they still use the client access code originally set up for them.
- o All clients are initially designated on the Client Info screen (behind the magnifying glass icon) as "shared" but may be changed to "non-shared."
- o Agency reports can be run on "Only original clients," "Only tagged clients," "Only original non-tagged clients," and "Original and tagged clients."

WORKING WITH SHARED CLIENTS

- o Once a client is set up, the original agency is responsible for coding the client to Client Coding and Local Programs. This coding can be modified by any agency who has "tagged" the client.
- o To "tag" a client, search for that client by clicking on "Search," entering a first or last name and identifying the type of name being searched for, then selecting "Shared non-tagged clients" under "Clients included" and clicking on Go. Once the client is displayed, go to the Client Info screen by clicking on the magnifying glass icon and then tick "We are also helping this client"; save. The client is now "tagged" by the agency, and the agency's name will appear in the list of "Helping agencies."
- o Once a client is set up as a shared client, any agency working with the client can change the status of the client to "non-shared" if the client so wishes. Once the "Client is shared" box is de-ticked, only the original agency will be able to access the client's ERS data. The "tagged" links will disappear.
- o If agencies wish to code clients to options that do not appear under Client Coding or Local Programs, they need to contact the Sponsor and request that the new option be added.
- o If an agency leaves a Shared Clients group, the Client Coding and Local Programs coding already done will remain intact; however, the agency will no longer have access to previously "tagged" clients' data.