WE Value Partnership

Settlement success. Together.

Partner Portal User Manual

for Affiliated Partners

June 2023

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Introduction and Overview

What is the purpose of this Word document?

This wiki was created as a reference manual to support those learning to navigate and use WE Value's K2 Pathway to Settlement System Partner Portal. Rather than create a straightforward static pdf document, we decided to design an interactive manual housed online that could constantly be updated to provide real-time accurate information. Partner Portal users can also use the wiki to ask questions and report problems or glitches within the system.

Who is meant to use this wiki?

The wiki is designed for anyone who is using the K2 Partner Portal - including staff of a K2 host organization or affiliated partners. It can also be used by those who are responsible for training affiliated partners, such as:

- Community engagement coordinators
- Community outreach officers
- Community Champions

The wiki is accessible via link, so can be shared as a resource with anyone who has (or will be given) a login to the Partner Portal.

What is the WE Value Partnership?

The WE Value Partnership is an ecosystem that fosters improved service delivery and experiences for newcomers through digital innovation and cross-sectoral collaboration. A host organization in each WE Value community offers newcomers a holistic and capacity-focused assessment that connects them to services, opportunities, and people. Clients are provided with a robust settlement plan, a summary of their capacities, and a unique profile that, together, help to streamline access to programming across the community. The WE Value Partnership also offers service provider organizations the opportunity to share their program and service information through the Partner Portal, where users also receive relevant referral details. All of this is made possible by a custom-designed Client Management System called the K2 Pathway to Settlement System -- and by a common belief that working together as a community will produce better outcomes for newcomers' settlement journeys.

What is the K2 Pathway to Settlement System?

The K2 Pathway to Settlement System is a custom-designed web-based digital Client Management System that is built on the Salesforce platform. K2 allows host organization staff to schedule, conduct, and evaluate assessments, develop comprehensive referral plans, generate and export iCare reports, and more. Within K2 are housed several different components:

1. **The WE Value Settlement Assessment:** A custom-designed holistic, capacity-focused Needs and Assets Assessment offered to newcomer clients by WE Value host organizations. Our assessment is informed by a literature review, validated by 7 settlement service providers and 16 mainstream agencies, and has undergone and ethics review. It covers 75 indicators of settlement across 14 categories, and is compatible with the 5 Social Determinants of Health. Although there are over 180 questions in our library, our system utilizes data mapping and skip-logic, giving each client a tailored assessment (i.e. responses to certain questions may branch out to reveal related questions - and hide others that are not applicable). The Assessment includes a questionnaire and referral builder. Results from the questionnaire are turned into a list of driving statements and actions to complete. A list of referrals is then created whereby clients can complete these actions. Together, the list of referrals, actions, and driving statements form the client's Settlement Plan.

2. **The Partner Portal:** Affiliated Partners are each given their own Partner Portal accounts, through which they can input information about their Organization, Locations, Programs, and Services/Activities, including eligibility criteria, dates/times available, languages offered, and much more. The information input into the Partner Portal is then used by assessors at the host agency to build a list of referrals that go into a client's Settlement Plan. The Partner Portal allows users to see referral details when a client is referred to them. IRCC-funded agencies have the additional opportunity to use the "Elevated View" feature, which allows clients' Primary Service Providers to see much more information related to the client's profile.

3. **The Client Portal:** This mobile-friendly browser-based application will give newcomer clients who have received their WE Value Settlement Assessment access to their own profile within the K2 system. They can view an interactive digital version of their settlement plan, browse through other services, and access a multitude of resources. The Client Portal is a pilot project that is in the testing stage.

What are the Roles and Responsibilities of Partners?

- **Host Organizations**: In each WE Value community, there is a host service provider, who manages that region's K2 system and offers the WE Value Settlement Assessment. Their staff are trained to deliver the assessment, build settlement plans, and coordinate with affiliated partners who use the Partner Portal. They are also responsible for inputting the basic information for non-affiliated partners into the system so it is available for referral.

There are currently THREE (3) host organizations across five communities:

Host Organization	Communities	Contact
YMCA of Southwestern Ontario	Windsor-Essex	(519) 258-9622 ext 2601 500 Victoria Ave, Windsor, ON www.ymcaswo.ca
	Sarnia-Lambton	(519) 328-4792 660 Oakdale Ave, Sarnia, ON www.ymcaswo.ca
	London	(519) 645-7553 ext 1 168 Elmwood Ave E, London, ON www.ymcaswo.ca
SECC SOUTH ESSEX COMMUNITY COUNCIL	Leamington	(519) 326-8629 215 Talbot St. E, Leamington, ON www.secc.on.ca
National Capital Region	Ottawa	(613) 788-5001 150 Isabella St, Suite 201, Ottawa, ON www.ymcaottawa.ca

- **Affiliated Partners:** These are partners who have a dedicated WE Value point person that has access to the Partner Portal and is committed to regularly updating program and service information in the K2 Pathway to Settlement System. Through the Partner Portal, Affiliated Partners can also receive notifications when a client has been referred to them, and can see referral details and client information. Often, these affiliated partners are IRCC-funded organizations, but can be any organization that has the capacity to maintain a partner portal account and who wants to see referral details.
- **Non-affiliated Partners:** These are organizations that do not have Partner Portal accounts, but whose basic information is included in K2 as a referable organization. Non-affiliated partners do not receive referral notifications or details. Examples include Service Canada, Service Ontario, libraries, etc.
- **Steering & Evaluation Committee Members:** The Committee is made up of 20-30 community members and stakeholders across all WE Value communities whose work or organization may be impacted in some way by the work we do and whose guidance we seek to enhance our work. Membership includes representatives from Affiliated Partner organizations, newcomer clients, non-affiliated partners, as well as city and township staff, among others. Representation across sectors, including healthcare, employment, and education have been sought to ensure a range of perspectives.

WE Partners	Host	Affiliated	Non-Affiliated
Conducts WE Value Assessments	✓		
Manages regional K2 Pathway to Settlement System	✓		
Is included as a referrable organization in creation of customized settlement plans.	✓	✓	✓
Has a Partner Portal account to input information about their programs, services, and activities.	✓	✓	
Can receive referral notifications and referral details when included in a client's settlement plan.	✓	✓	

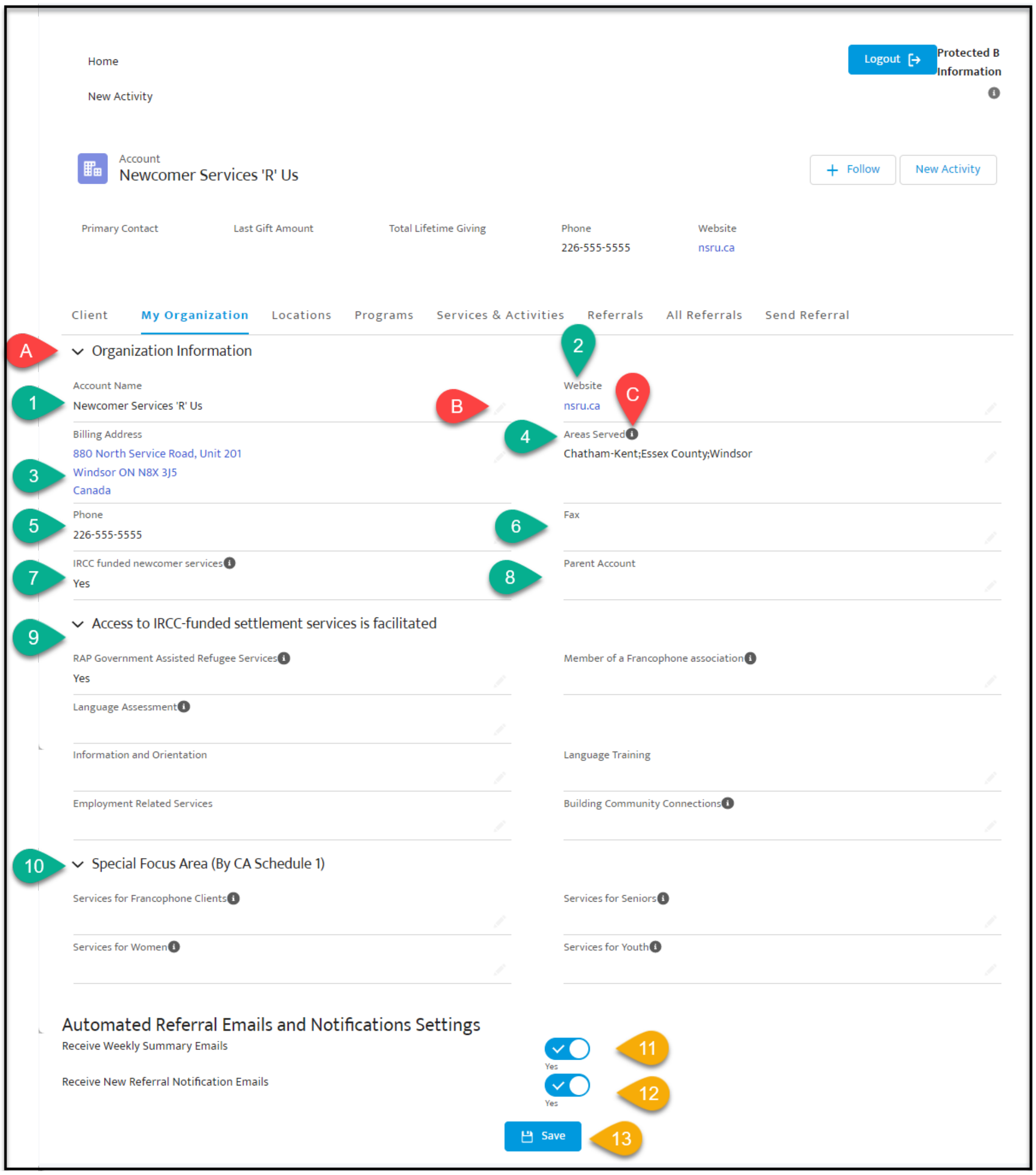
Why contribute to the Partner Portal?

- For **newcomers**: WE Value means less confusion, more confidence and increased self worth through streamlined experiences and fruitful community connections and a customized settlement plan. It will also lead to more opportunities to use assets, skills, talents and gifts while adjusting to a happy, safe, confident life as community members.
- For **community influencers and stakeholders**: WE Value will allow access to assets, skills, talents and gifts of newcomers provide resources that will deepen evidence-based approaches to serving new immigrants resulting in positive community impact.
- For **service providers**: WE Value means timely, accurate referrals, and coming together to streamline processes and enhance experiences, all toward greater integration, welcoming communities and the success of newcomers.

My Organization

The "My Organization Page" is the best place to start filling out your Partner Portal. This is where you can input information about your organization at the highest level.

When building a settlement plan, assessors from the host organization can refer clients at the organization level. For non-affiliated partners, this is the only information made available for inclusion in referrals.



A- Clicking on the dropdown icon will collapse or expand the fields under the associated header.

B- Clicking the pencil icon in any field on this page will allow you to edit all the details on this page.

C- Hovering above the "information" icon will provide you with additional details to help you fill out the associated field. For example,

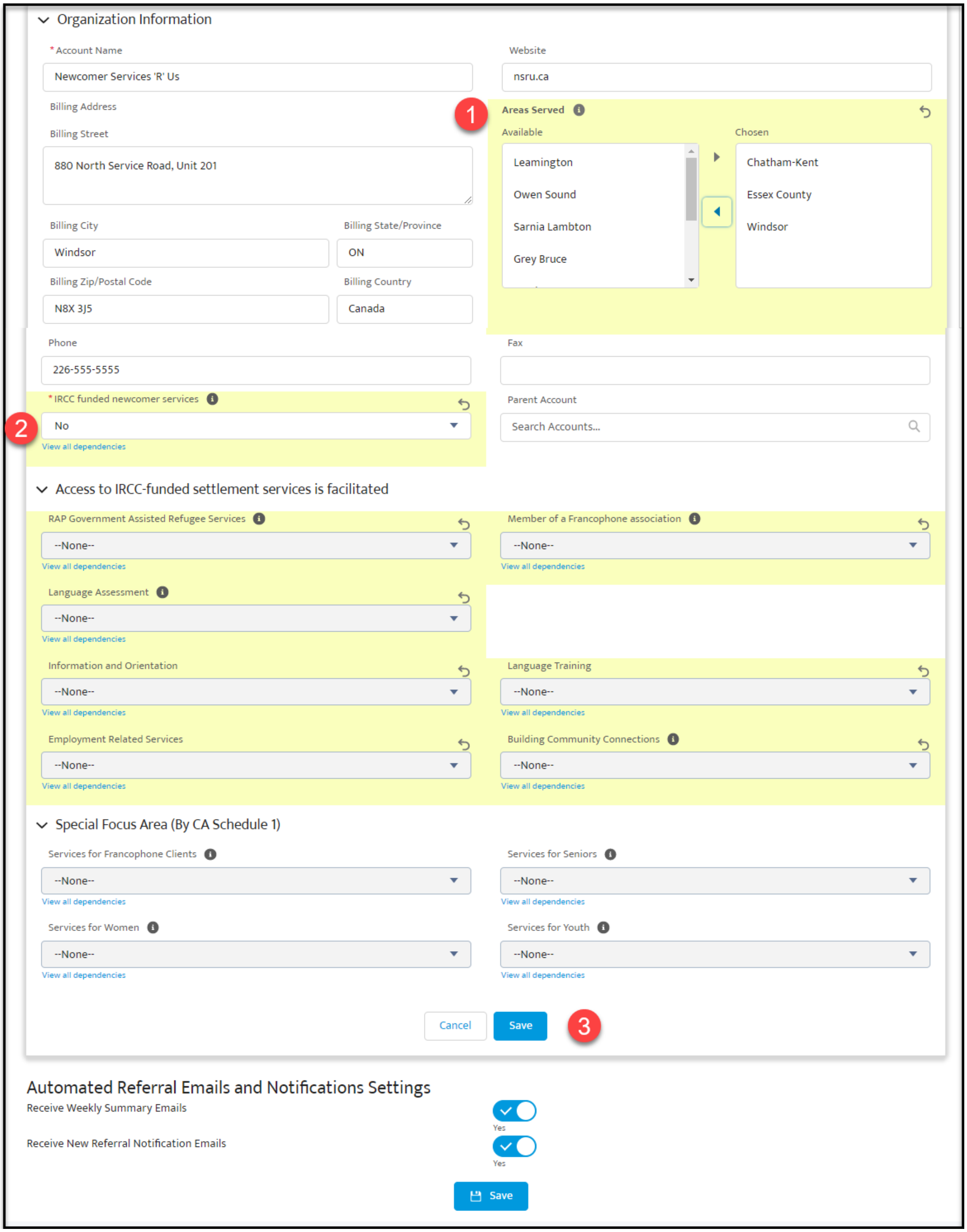
1. Your **Account Name** is the name of your organization as it appears in the Partner Portal, which is also how it will appear on clients' settlement plans.
2. **Website:** When saved, this field will automatically become a hyperlink to the address you input. Remember, this is for your organization overall - not a specifical program or service/activity.
3. **Billing Address:** This is your organization's address, most usually the main office. You will be able to further specify secondary locations in the "Locations" tab. (Note: You will likely need to include this head office again in the "locations" tab if you offer services from this location). When saved, this field will automatically turn into a hyperlink that leads to a Google maps listing at that address.
4. **Areas Served:** This field refers to all the areas served by your organization overall, not any specific programs or services/activities.
5. **Phone:** A common best practice is to include the main reception number for this field. Remember, this is for your organization overall - not a specifical program or service/activity.
6. **Fax:** A common best practice is to include the main reception number for this field. Remember, this is for your organization overall - not a specifical program or service/activity.
7. **IRCC funded newcomer services:** If your organization is funded by IRCC to provide newcomer services, you can note that here. Your selection in this section will affect which options are available to you in several fields below.
8. **Parent Account:** This field is part of advanced functionality that is not yet available to Partner Portal users as it has not been fully developed.
9. **Access to IRCC-funded Settlement Services is facilitated:** Your selection in field #7 will determine if you are able to make changes in any of these fields. If you offer IRCC-funded services, you can note which ones your organization

offers. You will be able to provide more information later, in the "Programs" and "Services & Activities" tabs.

10. **Special Focus Area (By CA Schedule 1):** Your selection in field #7 will determine if you are able to make changes in any of these fields. If you offer IRCC-funded services, you can note which targets groups, if any, you are funded to serve.
11. **"Receive Weekly Summary Emails" toggle:** If this toggle is in the "on" position, the email address attached to this partner portal account will receive weekly emails summarizing all referrals that were made to your organization that week. These emails are automatically sent on Mondays.
12. **"Receive New Referral Notification Emails" toggle:** If this toggle is in the "on" position, the email address attached to this partner portal account will receive an email each and every time a new referral is made to your organization.
13. **"Referral Notification Emails" Save button:** This save button ONLY saves changes to the Referral Notification Emails" options. Remember to click this any time you update your email notification settings. There is a separate button to save edits on the rest of the page in the edit window.

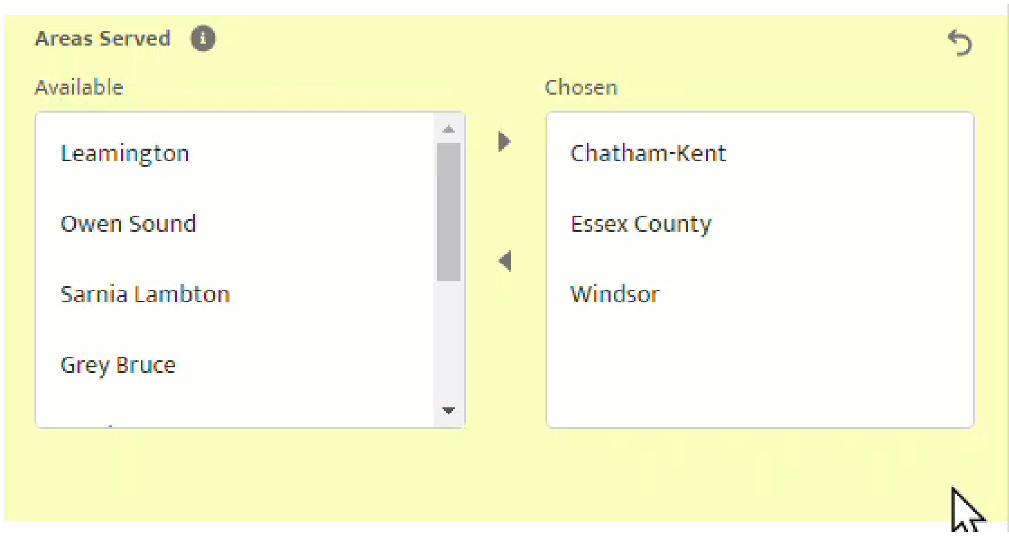
Editing “My Organization”

Click on the pencil icon in any of the fields on the "My Organization" page to open the editing window and make changes to your profile information.



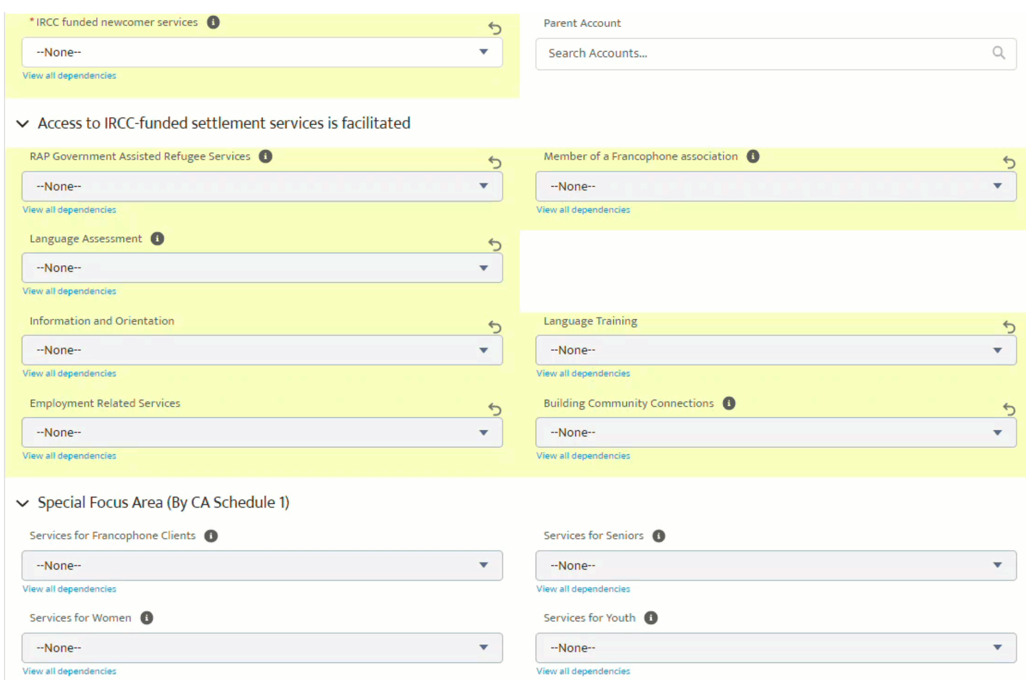
1. Selecting Areas Served:

Select areas from the picklist options in the left column, and use the ▶button to add them to the "chosen" list on the right.



2. IRCC-Funded Newcomer Services

When your selection for the field labelled "IRCC funded newcomer services" is either "None" or "No", you will not have the option to edit any of the fields below: they will be locked to the default "none" option. If your organization DOES offer IRCC-funded services, you can select "Yes" in this field, and further specify what kinds of IRCC-funded services you offer.



3. Save Button - Editing Mode

This is a separate save button specifically to save your edits in all of the fields. Always remember to click this button when you are finished editing your page. The second save button at the very bottom of the screen will ONLY save your Automated Referral Notifications Settings.

BEST PRACTICES

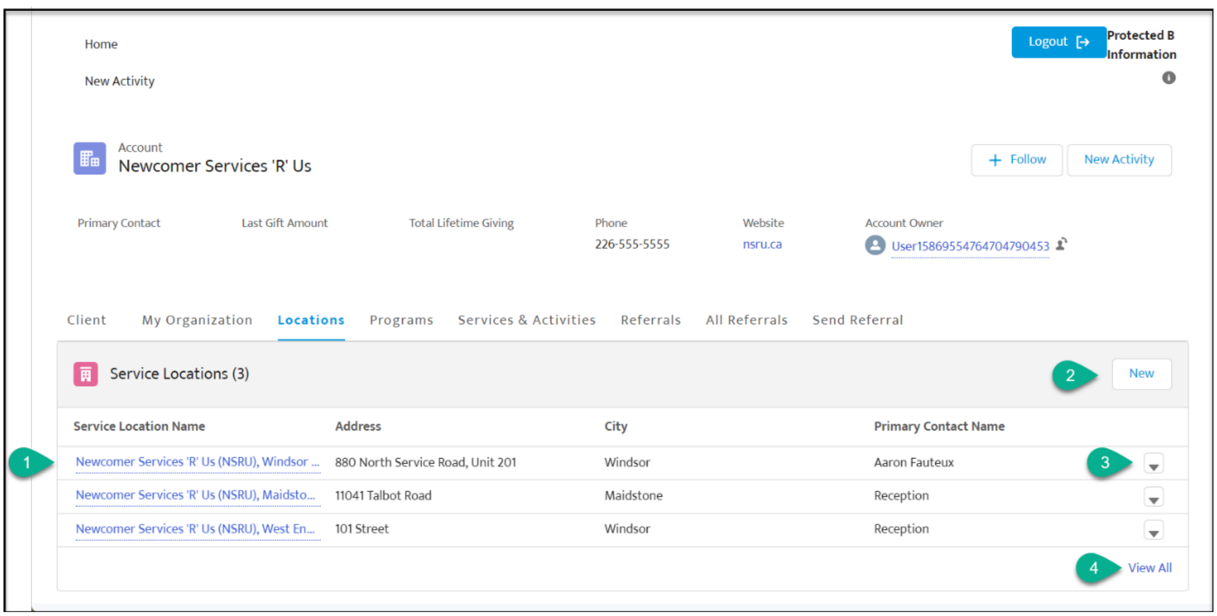
- Always save when making edits to the page - and remember that there are two different save buttons: one for all edits, and one for email notification settings.
- Remember this page represents the organization overall, NOT individual programs or services & activities
- Fill out the "My Organization" page first, because your selections here will affect your options in other pages (especially if you offer IRCC-funded services).
- While this page can be edited at any time, we encourage you to avoid making changes here unless they are necessary, for the sake of consistency.

Service Locations

Service Locations enables us to see where your activities are taking place. While some organizations may only have one service location, others may have multiple sites, including those used for itinerant services.

It is important to add your locations as you build your profile since each Service/Activity will be attached to a specific location. This is also true for organizations offering services online.

It is important to remember that even if you list a location's information (address, phone number, etc.) on the "My Organization" page, you must also input that same information as its own Service Location if you offer services from this location. This is because all Services and Activities need to be attached to one Service Location.

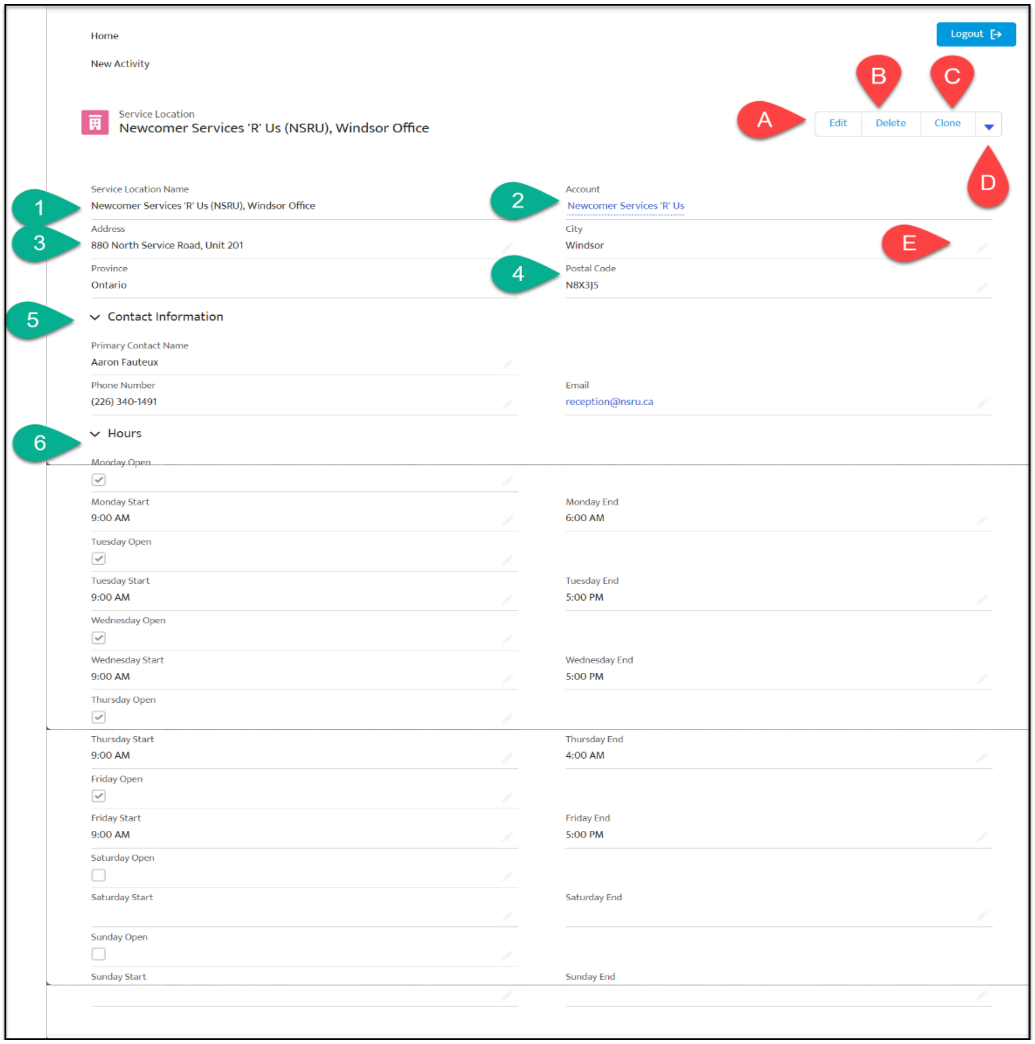


On the main page, users will see a list of the service locations that have been created for their organization. This list includes basic details including the location name, address, city, and primary contact.

1. Clicking on the Service Location Name will take you to a new page with all of that location's details.
2. Clicking the "New" button will open up a new modal window that will allow you to create a new service location for your organization.
3. The dropdown button will give you the option to edit or delete the associated location.

4. "View All" will show you more service activities if you have more than three in your account.

Location Details



A - **Edit Button:** This will open a new modal window in which you can edit the Service Location details found on this page.

B - **Delete Button:** This will delete this location from your available locations list. Note: This action cannot be undone.

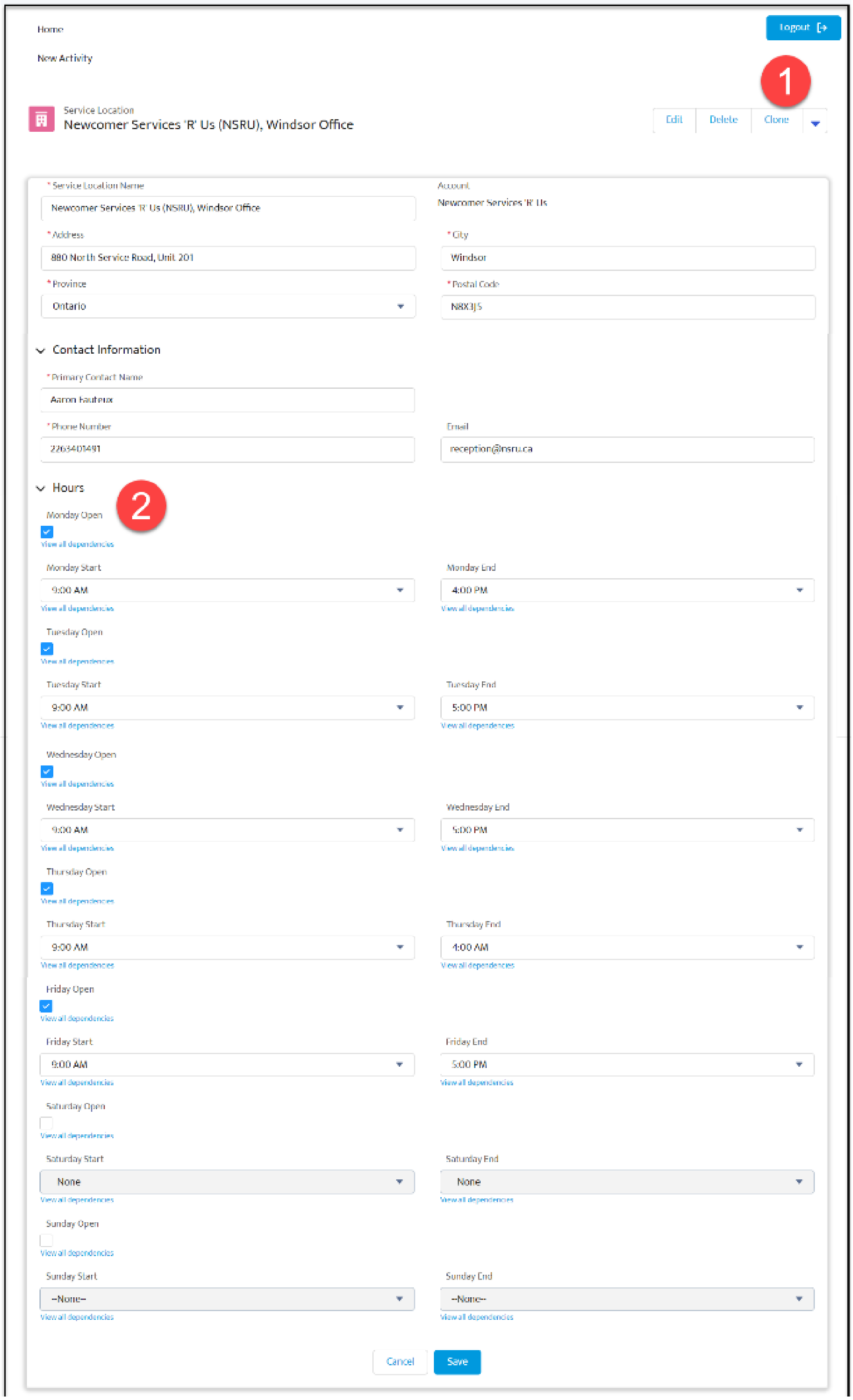
C - **Clone Button:** This will create a copy of the Service Location you have open.

D - Clicking on the **Dropdown Button** reveals "Printable View" button to open a new tab with information displayed in printer-friendly format.

E - Clicking the **pencil icon** in any field on this page will allow you to edit all the details on this page. Note: This has the same function as the edit button (A) but opens in a slightly different view format.

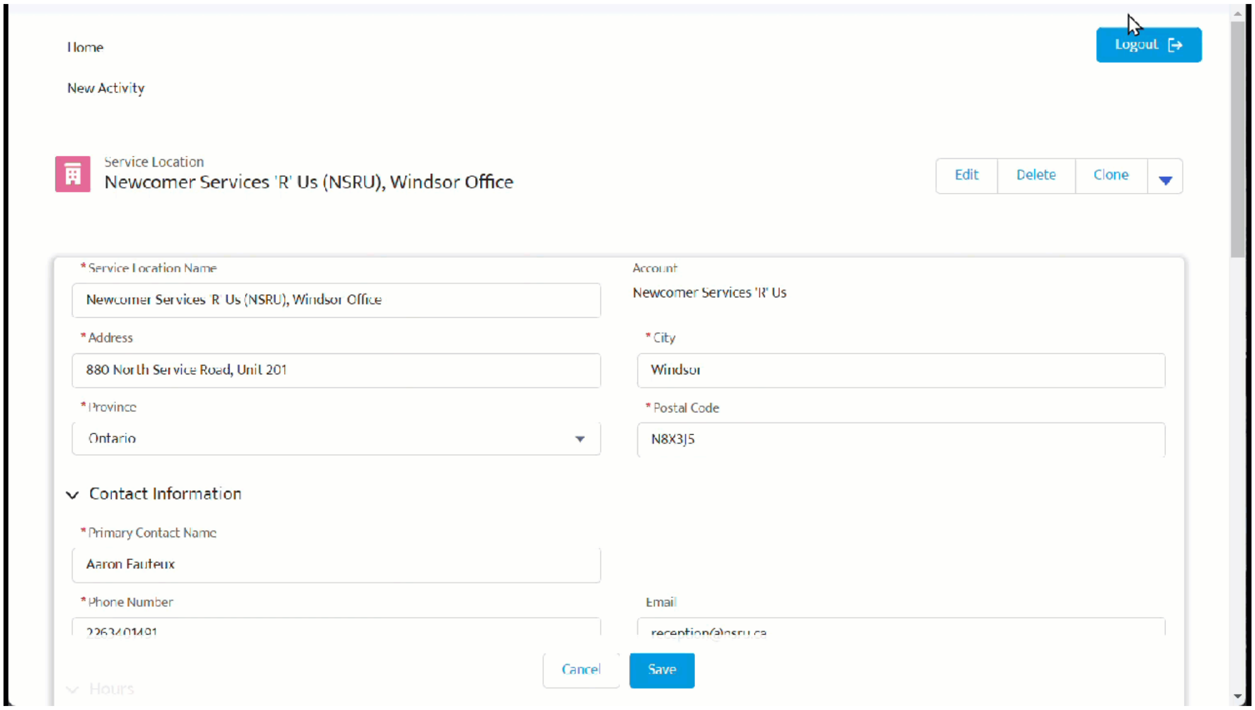
1. **Service Location Name:** This is the name of the specific service location. An organization can have one or multiple service locations. Examples may include "main office", "west end branch," "Tecumseh Road office," etc. **See Best Practices for Recommended Naming Convention*
2. **Account Name:** Since this is the name of your account, it cannot be edited, except from the "My Organization Page".
3. **Location Address:** Input the Service Location's address in these fields.
4. **Postal Code:** Postal codes should be input using capital letters and no spaces. If entered incorrectly, you may receive an error notification when you save your edits.
5. **Contact Information:** It is recommended to use the contact information for the specific location, rather than the overall organization. If there is a phone extension, remember to include that here. When in doubt, a good default for these fields is to include the number and email for reception.
6. **Location Hours:** Here, you can input the open hours for this location, by day of the week. When editing, remember to click the check box to note that it is open, even

Editing "Service Locations"



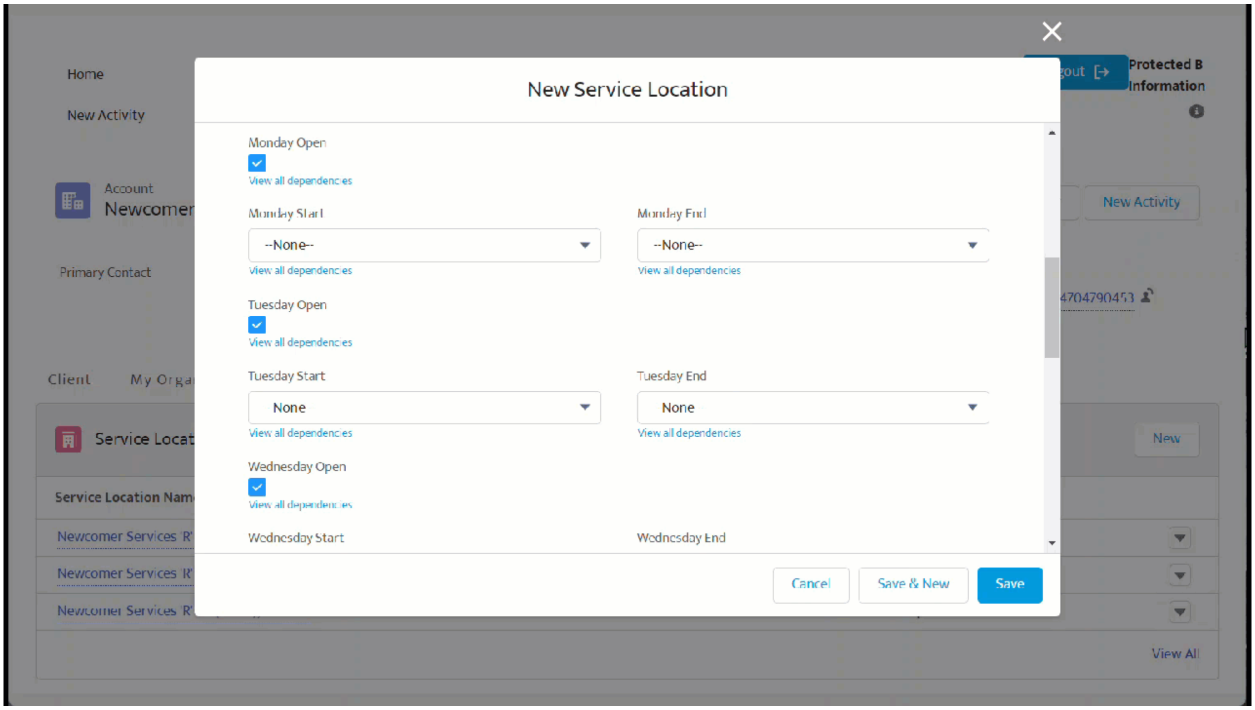
1. Using the "Clone" feature to Create a New Service Location

If you want to save time creating a new service location that shares similar information (i.e. hours of operation) with an existing Service Location, you can do so using the "Clone" feature. It will copy all of the fields in an edit window, so you can simply make the necessary changes -- don't forget to change the location name and click "save"!



2. Editing Hours of Operation

If the check-box is unclicked (no check mark), that means the location is closed that day, and you will not be able to change or add times to that day. When it is clicked, you can choose open and closing times from a dropdown picklist in 30-minute increments.



BEST PRACTICES

• Use the following naming convention for Service Locations:
  ○ Name of Organization (ACRONYM if applicable), Description
  ○ e.g. "Newcomer Services 'R' Us (NSRU), Main Office
• All Services and Activities must be attached to a location. Remember to include every location from which services are offered, including the main office, even if you've already input that location's information in the "My Organization" page.

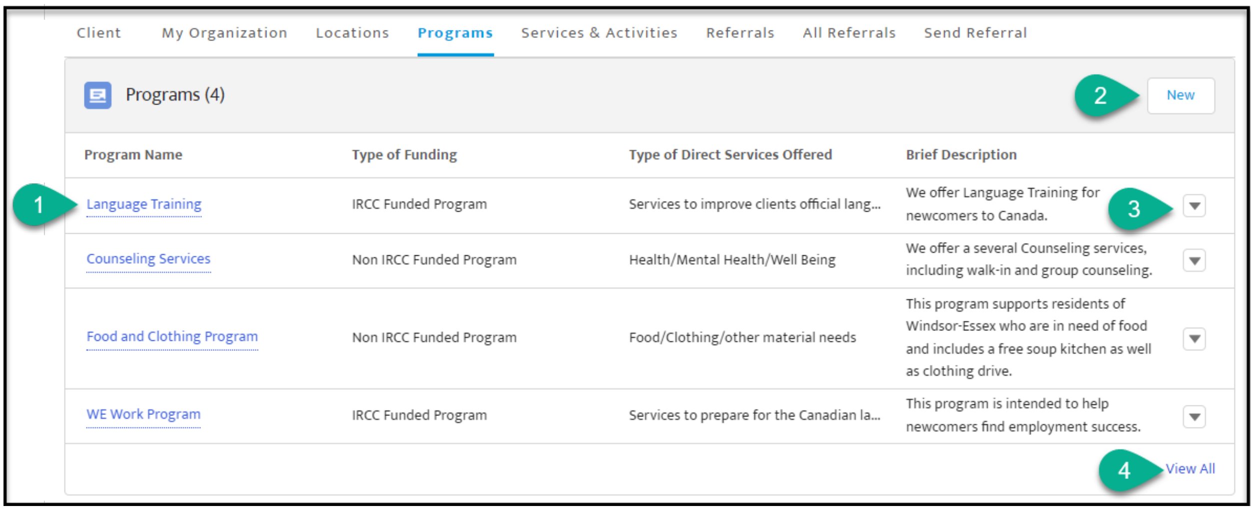
Programs

Programs are overarching or umbrella names for groups of Services & Activities. All programs must have at least one attached Service & Activity.

It can sometimes be challenging to decide what is considered a program, and what is considered a service, so it's up to each organization to decide how best they want to organize this. Keep in mind that eligibility criteria is only captured at the service/activity level.

For example, a Program name might be "Language Training," and include several different service activities, like LINC classes and Enhanced Language Training for Health Care Professionals. OR, you might name a program "Counseling" and include service activities like "Walk in Counselling Clinic" and "Group Counseling Sessions".

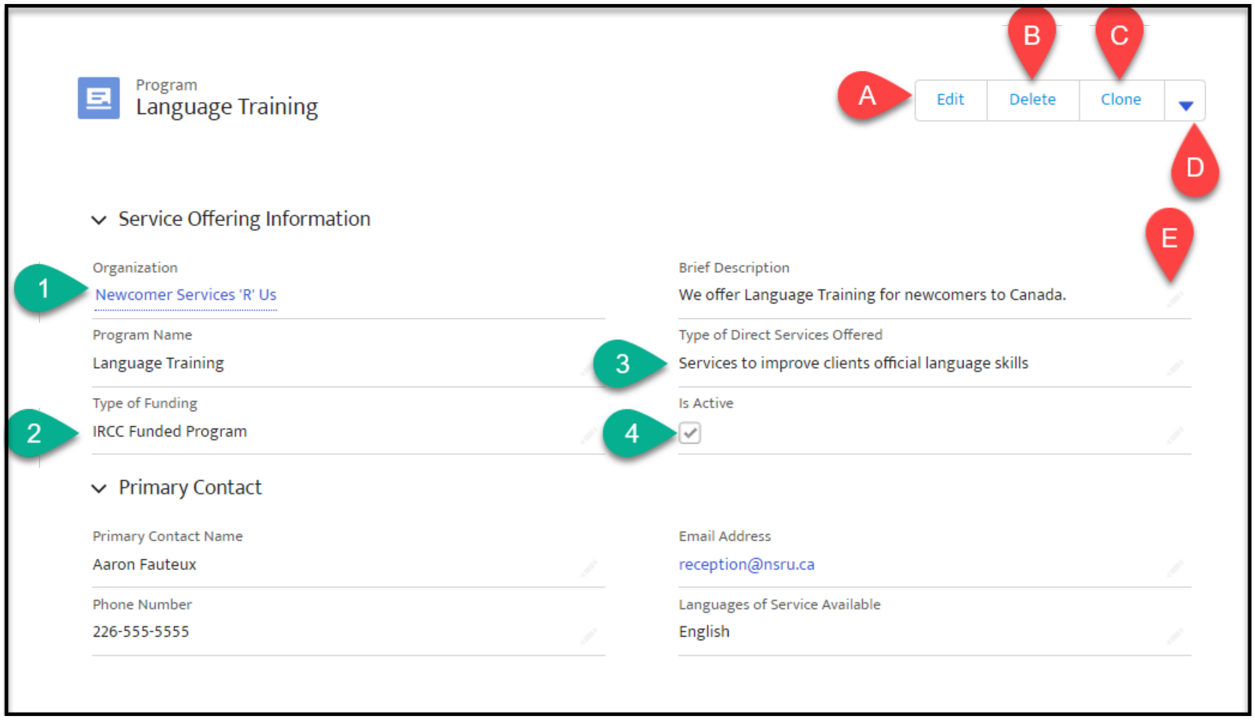
In some cases, you may need to create a program to house only one specific service or activity that doesn't quite fit into any other program description.



On the main page, Partner Portal users will see the list of programs that have been created within their account, with a snapshot of information.

1. Clicking the Program Name will take you to a page with that program's details.
2. The "New" button will open an editor page to allow you to create a new program from scratch.
3. The dropdown button will open a new modal window to allow you to edit the details of the associated program OR delete that program entirely.
4. Clicking "View All" will allow you see more programs that have been created within your account, if they do not all appear in the list.

Program Details



A - **Edit Button:** This will open a new modal window in which you can edit the Service Location details found on this page.

B - **Delete Button:** This will delete this location from your available locations list. Note: This action cannot be undone.

C - **Clone Button:** This will create a copy of the Service Location you have open.

D - Clicking on the **Dropdown Button** reveals "Printable View" button to open a new tab with information displayed in printer-friendly format (or anything listed here that is not visible in your window).

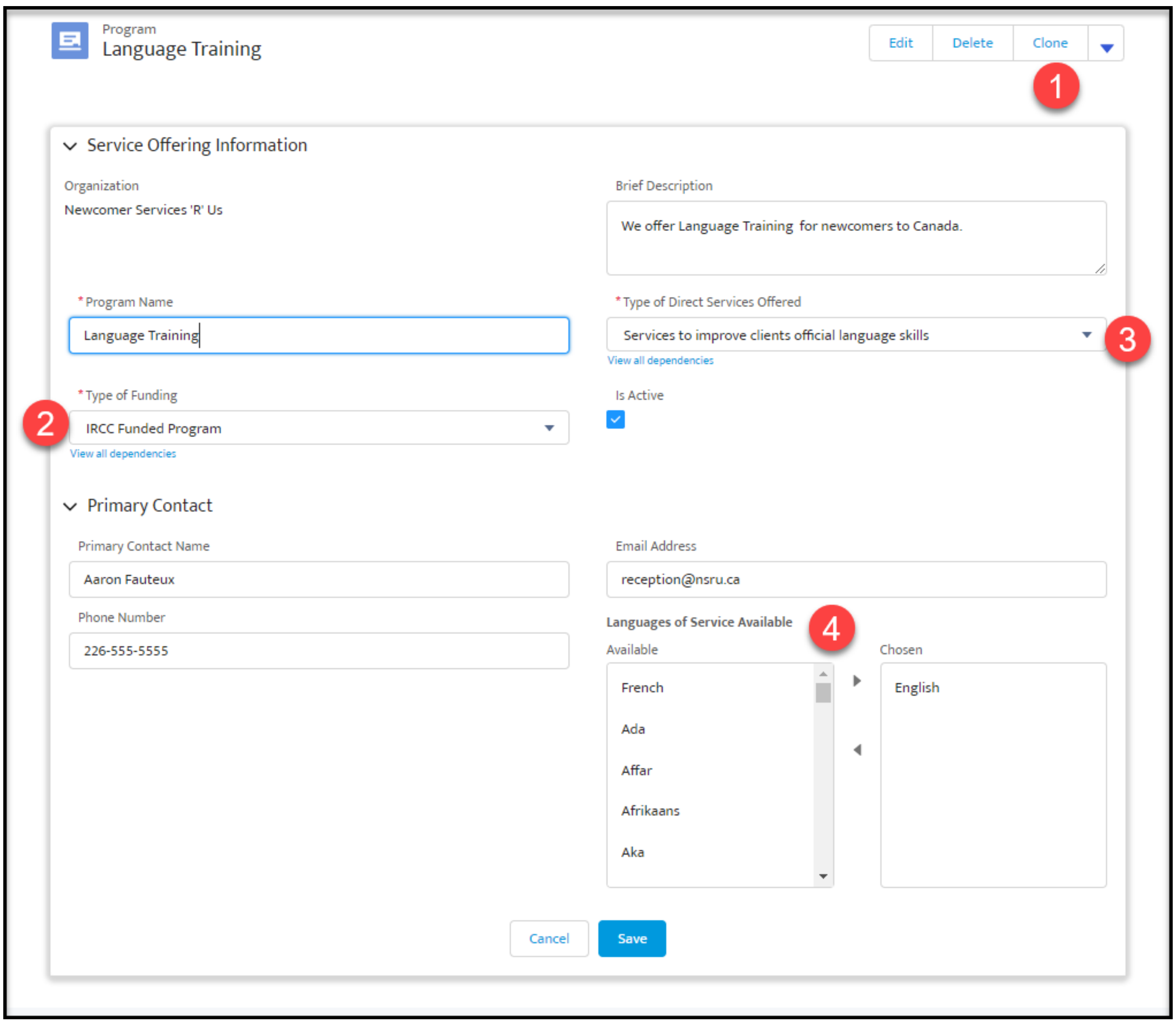
E - Clicking the **pencil icon** in any field on this page will allow you to edit all the details on this page. Note: This has the same function as the edit button (A) but opens in a slightly different view format.

1. **Account Name:** Since this is the name of your account, it cannot be edited, except from the "My Organization Page".
2. **Type of Funding:** This notes whether the program is IRCC-funded or non-IRCC funded. The response to this category affects the available picklists in the "Type of Direct Services Offered" category.

3. **Type of Direct Services Offered:** This narrows down the type of program to keywords - options available in the picklist (in editing mode) will depend on the "Type of funding" you have selected. Categories for non-IRCC funded programs are broader, whereas categories for IRCC-funded programs are specific since they cover topics under which IRCC offers funding. Your choices in this field will affect the options available to you in the "Main Theme for Activity" field when creating a Service or Activity attached to this program.

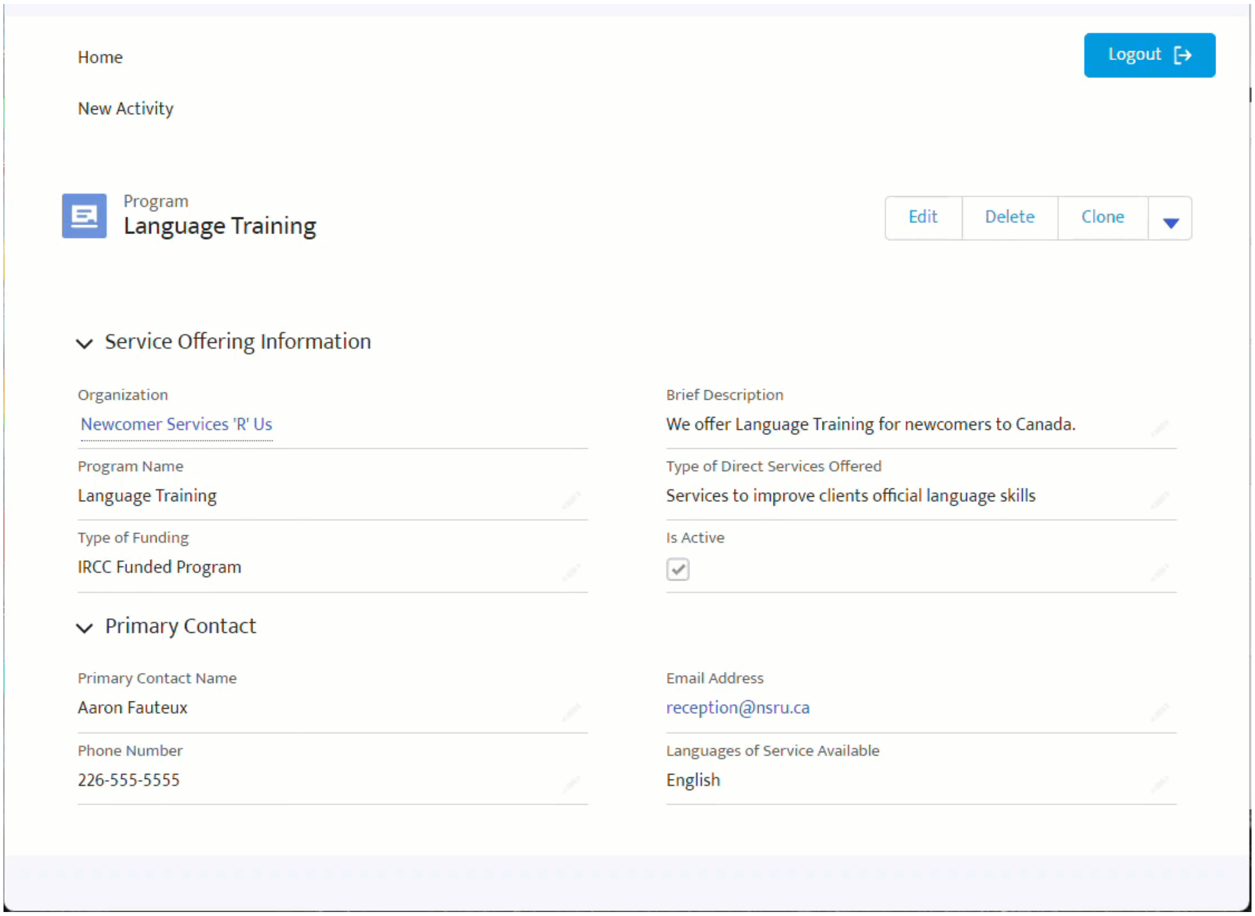
4. **Is Active:** This notes whether the program is currently active (meaning there are services currently being offered that are part of this program, or that your organization is still being funded to provide such services).

Editing "Programs"



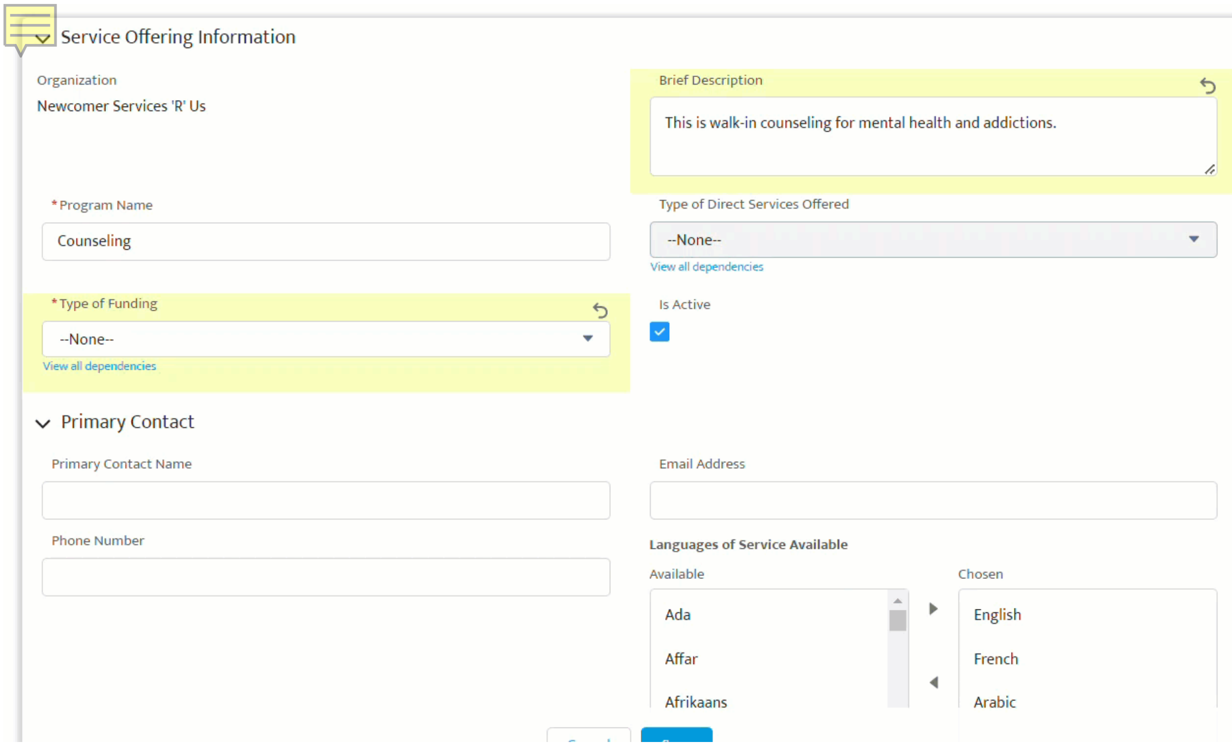
1- Using the "Clone" feature to Create a Program

If you want to save time when creating a new program that shares similar information with an existing Service Location, you can do so using the "Clone" feature. It will copy all of the fields in an edit window, so you can simply make the necessary changes -- don't forget to change the location name and click "save"!



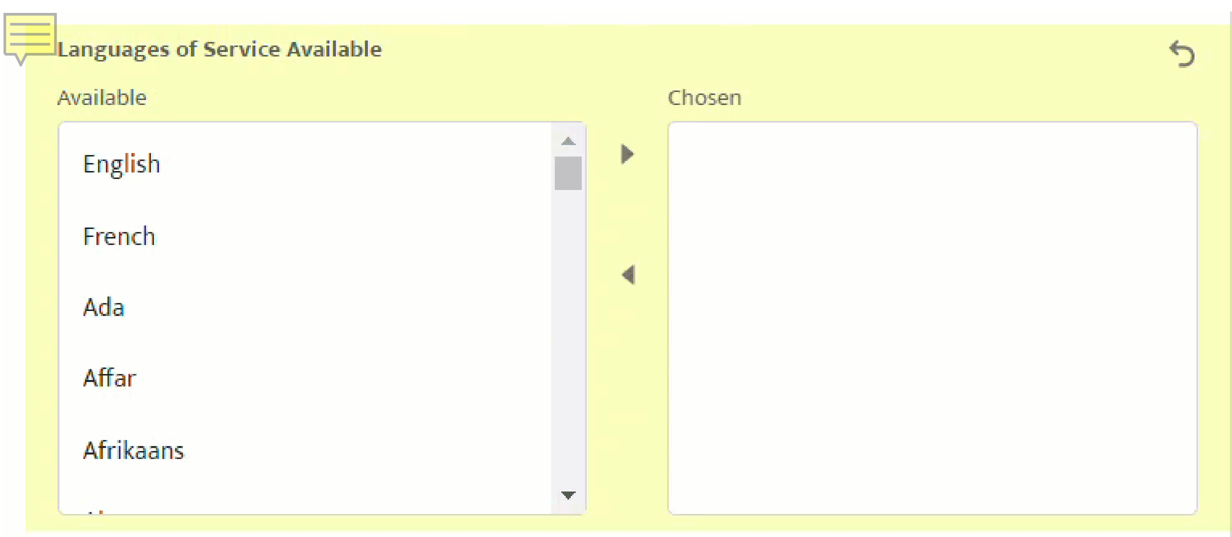
2 and 3- Type of Funding & Type of Services Offered

As seen in the GIF below, your response in the "Type of Funding" field will determine what options are available in the "Type of Direct Services Offered" picklist.



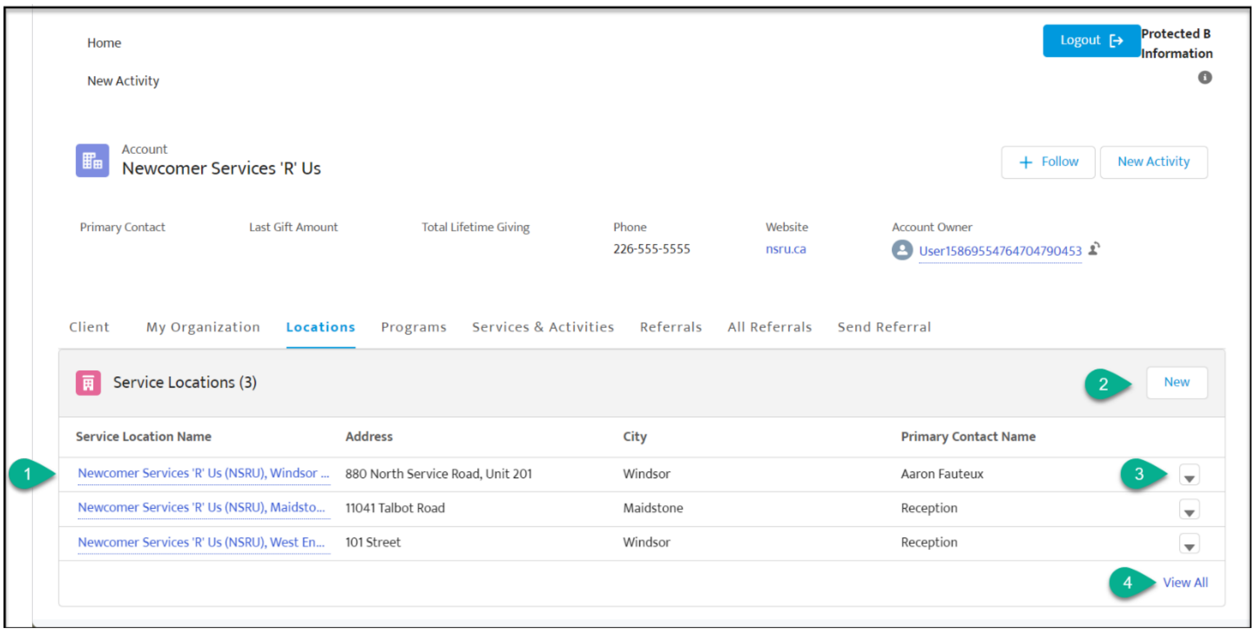
4- Languages of Service Available

Select languages from the picklist options in the left column, and use the ▶button to add them to the "chosen" list on the right. To remove a language from the "chosen" languages, use the ◀button to put it back into the "available" list.



Services & Activities

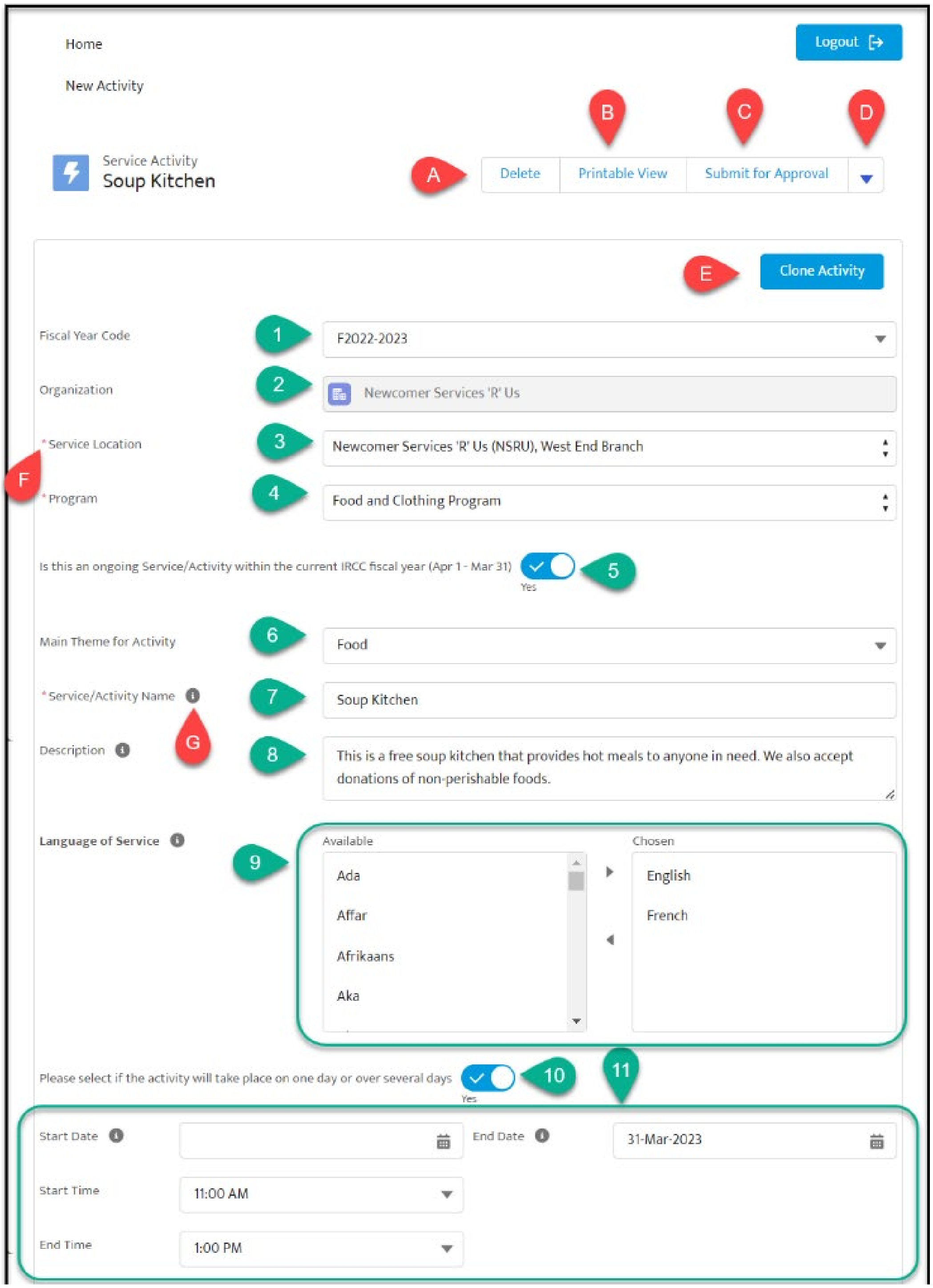
Services & Activities is the section of the Partner Portal where you input each service, session, activity or class that your organization runs. You can also refine your eligibility criteria and tell us a little bit more about the clients for whom your services are designed.



On the main page, Partner Portal users will see the list of Services & Activities that have been created within their account, with a snapshot of information.

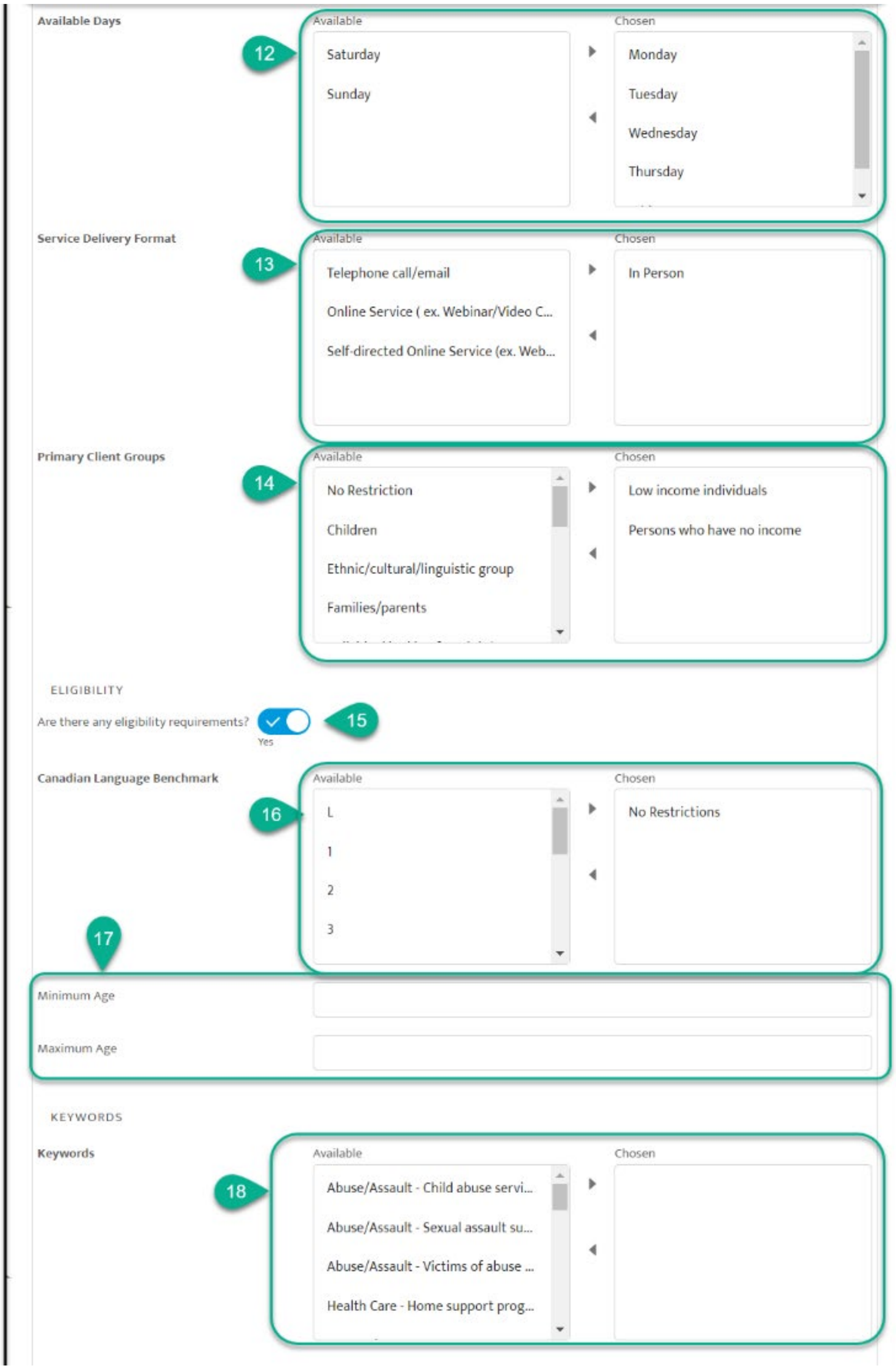
1. No matter which tab you are viewing on the main page of the Partner Portal, the **"New Activity" button** will appear at the top left. This is the primary way to create a new service or activity. Once created, the activity will always appear in the "Services & Activities" tab.
2. Clicking the **Session Name** will take you to a page with that Service/Activity's details, which will already be in an editable view.
3. The **dropdown button** will open a new modal window to allow you to edit the details of the associated program OR delete that program entirely.
4. Clicking **"View All"** will allow you see more programs that have been created within your account, if they do not all appear in the list.

Service & Activity Details/ Edit Mode



Screenshot continues on next page

Screenshot continued from last page



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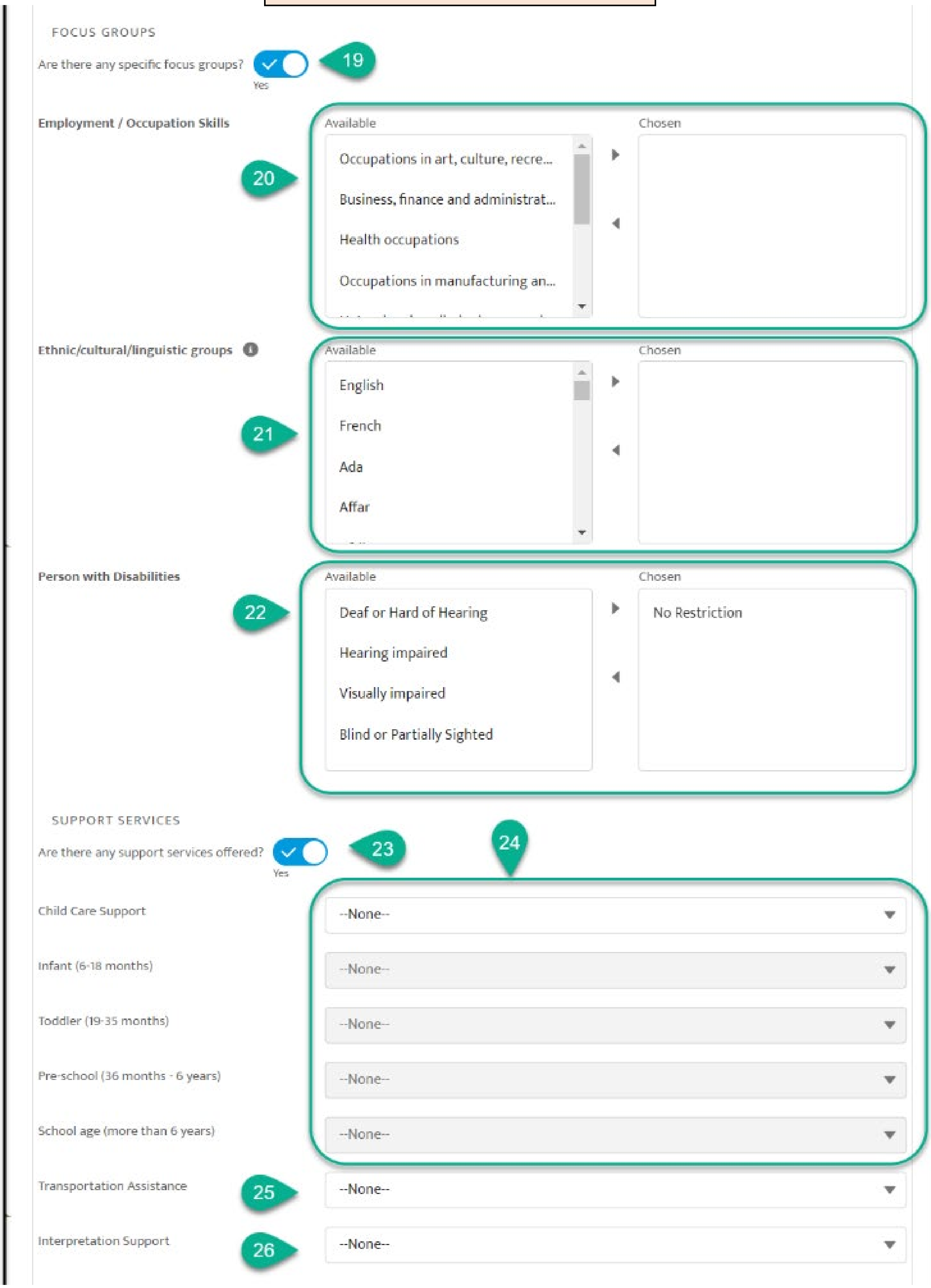

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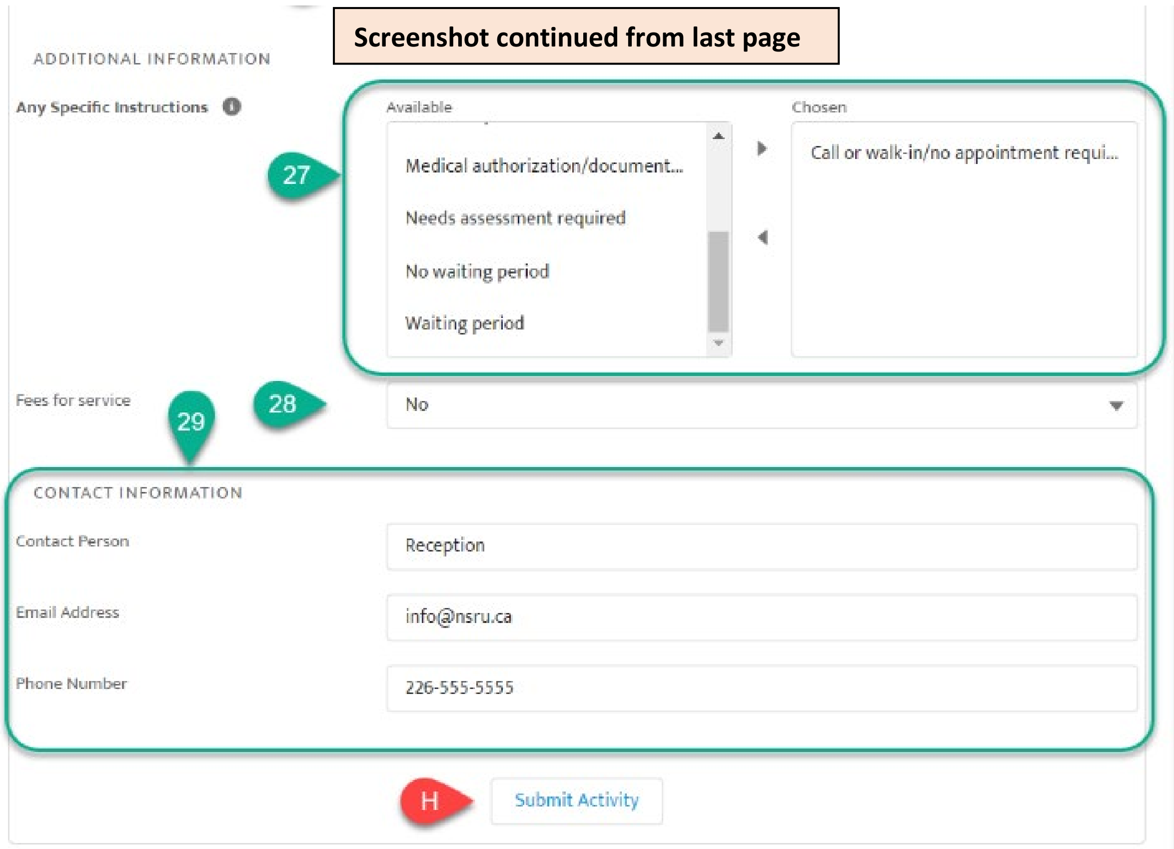
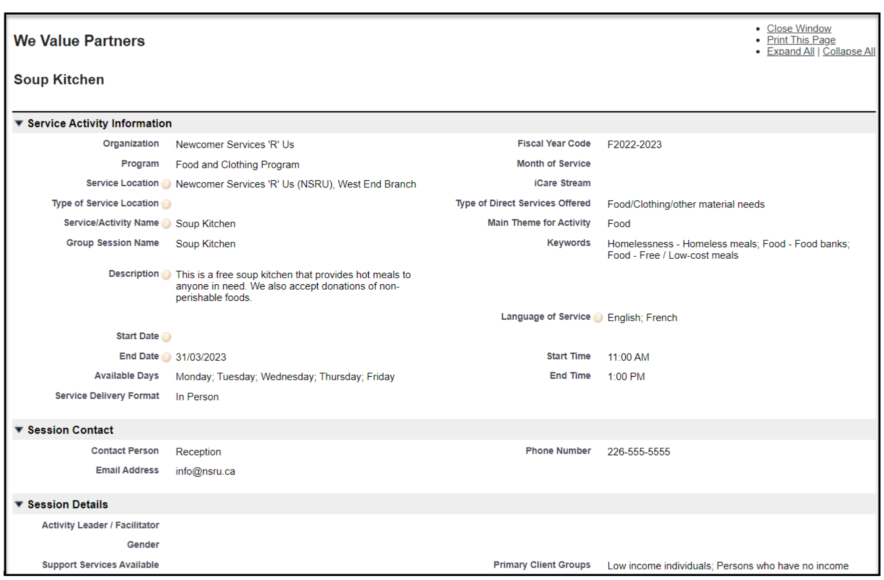


A - **Delete Button:** Clicking this button will delete the service/activity that you are viewing. A modal window will open asking you to confirm before deleting.

B - **Printable View Button:** Clicking this will open a new browser tab, displaying the information for this Service/Activity in a printer-friendly format. The following image is an example of a Service/Activity in "printable view".



- Close Window
- Print This Page
- Expand All | Collapse All

We Value Partners

Soup Kitchen

▼ Service Activity Information

Organization	Newcomer Services 'R' Us	Fiscal Year Code	F2022-2023
Program	Food and Clothing Program	Month of Service	
Service Location	Newcomer Services 'R' Us (NSRU), West End Branch	iCare Stream	
Type of Service Location		Type of Direct Services Offered	Food/Clothing/other material needs
Service/Activity Name	Soup Kitchen	Main Theme for Activity	Food
Group Session Name	Soup Kitchen	Keywords	Homelessness - Homeless meals; Food - Food banks; Food - Free / Low-cost meals
Description	This is a free soup kitchen that provides hot meals to anyone in need. We also accept donations of non-perishable foods.		
		Language of Service	English; French
Start Date			
End Date	31/03/2023	Start Time	11:00 AM
Available Days	Monday; Tuesday; Wednesday; Thursday; Friday	End Time	1:00 PM
Service Delivery Format	In Person		

▼ Session Contact

Contact Person	Reception	Phone Number	226-555-5555
Email Address	info@nsru.ca		

▼ Session Details

Activity Leader / Facilitator			
Gender			
Support Services Available		Primary Client Groups	Low income individuals; Persons who have no income

C - **Submit for Approval Button:** This button is not yet functional, and is part of future-state developments.

D - **Dropdown Button:** Clicking this reveals additional buttons that do not appear on your screen:

- **EDIT:** This allows you to edit the details of your service/activity in a modal window.
- **CLONE:** This allows you to make a duplicate of the service/activity (see below for further explanation)

E - **Clone Activity Button:** This allows you to make a duplicate of the service/activity (see below for further explanation)

F - *The **red asterisk** denotes a required field. A service/activity cannot be saved if the field is required.

G - Hovering above the "information" icon will provide you with additional details to help you fill out the associated field.

H - **Submit Activity Button:** Clicking this button will save any edits you've made to the Service/Activity or publish the new activity to be available for referral.

1. **Fiscal Year Code:** This is a dropdown menu picklist with relevant options to choose from. To avoid flooding the picklist with too many options, we update the options with the following year's fiscal year code one year in advance and delete old fiscal year codes when the following year.
2. **Organization Name:** This field is not editable except from the "My Organization" page.
3. **Service Location:** Options available in this picklist are the Service Locations associated with this account, as created and viewable in the "Service Locations" tab.
4. **Program:** Options available in this picklist are the Programs associated with this account, as created and viewable in the "Programs" tab.
5. **Ongoing Service/Activity toggle:** Turn this button on or off, depending on whether or not your organization is currently offering this as an ongoing service/activity. (You may want to revisit your services & activities at the beginning/end of each fiscal year to ensure they are up-to-date).
6. **Main Theme for Activity:** The options available in this picklist will depend on the Program (4) that you have selected for this service/activity. For example, if an IRCC-funded program has "Services to improve clients official language skills" as

the value for the "Type of Direct Services Offered" field, options for "Main Theme for Activity" will be limited to a few options such as "Language Training (general)" and "Language Assessment".

7. **Service/ Activity Name:** Try to keep this response short, but make sure to include any relevant details to separate it from similar service/activities. For example, if you offer LINC classes with different sessions/times for different CLB levels, you can name them:
    1. Language Instruction for Newcomers to Canada (LINC) - CLB 1-4
    2. Language Instruction for Newcomers to Canada (LINC) - CLB 5+
8. **Description:** Here, you can elaborate on details about the Service/Activity. If you have a recurring service/activity that is offered at different times each day, it may be too complicated to list these in the date/time fields (11), so you can include any specific information here.
9. **Language of Service:** Include any and all languages in which this service or activity is offered.
10. **Multiple Days toggle:** If this is switched to "Yes," you will be able to set a start AND end date for the service/activity. If this is a one-time event, switch the toggle to "No" and the Start date will be the only option.
11. **Date/Time Fields:** After noting whether your service activity takes place on one or multiple days using the toggle above (10) you can then set the start/end dates, as well as start/end times each day. We recognize there are many different schedules based on each organization and the Services/Activities they offer. We recommend using the start/end times field on recurring Service/Activities when the time is consistent each day. If not, you can include that information in the Description field (8).
12. **Available Days Fields**: Select which day(s) of the week this Service/Activity is available. Multiple days can be selected.
13. **Service Delivery Format:** Here, you can select how your service is delivered. Multiple can be selected, for example if your organization uses a hybrid model, a Service/Activity may be available in person AND online. The options are:
    1. In Person
    2. By Telephone/Email
    3. Online (Webinar/Video Conference)
    4. Self-directed Online Service (ex. Website)
14. **Primary Client Groups:** Here, you can select which primary client groups this service/activity is offered to (if any).

15. **Eligibility Toggle:** If this service/activity has any eligibility requirements, turn this toggle to "on" to reveal additional fields (16+17)
16. **Eligibility - CLB Level:** If this Service Activity is only offered to clients at specific Canadian Language Benchmark (CLB) levels, please select which ones here.
17. **Eligibility - Minimum and Maximum Age:** If you have a minimum OR maximum age eligibility requirement for this service/activity, note it here. If there is none, leave it blank (you do not need to write 0 or 100).
18. **Keywords:** The options available in this picklist will depend on the Program (4) that you have selected for this service/activity. For example, if an IRCC-funded program has "Services to improve clients official language skills" as the value for the "Type of Direct Services Offered" field, options for Keywords will include "job specific language training", "Newcomers-English as a second language" and "Language training (daily life/basic needs) among many others. Likewise, if the associated program is Employment-related, options like "help finding a job" and "Employment/Training -Work Experience" will appear, among many others. These keywords will help assessors at the WE Value host organization find appropriate services & activities when building a list of referrals for a settlement plan.
19. **Focus Groups toggle:** If this service/activity is targeted towards any focus groups, turn this toggle to "YES" to reveal additional fields (20, 21, 22)
20. **Focus Groups - Employment/Occupation Skills:** Here, you can list any and all employment categories or skills that are applicable as a focus of this service/activity. This field is only available if the Focus Group toggle is set to YES (19).
21. **Focus Groups - Ethnic/cultural/linguistic Groups:** If this service/activity is targeted towards a specific ethnic/cultural/linguistic group, you can note that here. This field is only available if the Focus Group toggle is set to YES (19).
22. **Focus Groups - Person with Disabilities:** If this service/activity is targeted towards persons with disabilities, you can note which here. This field is only available if the Focus Group toggle is set to YES (19).
23. **Support Services Toggle:** If your organization offers any support services for clients participating in this service/activity, turn this toggle to YES to reveal additional fields (24,25,26)
24. **Support Services** - Child Care Support Fields: If your organization offers child care support for clients participating in this service/activity, select "YES" from the top dropdown. You can then further specify the ages for which this service is available. This field is only available if the Support Services toggle is set to YES (23).

25. **Support Services - Transportation Assistance:** If your organization offers transportation assistance for clients participating in this service/activity, you can note that here. This may include providing bus tickets. You may want to note what type of transportation assistance you provide in the description (8). This field is only available if the Support Services toggle is set to YES (23).

26. **Support Services - Interpretation Support:** If your organization offers interpretation support for clients participating in this service/activity, you can note that here. This field is only available if the Support Services toggle is set to YES (23).

27. **Additional Information - Specific Instructions:** This field gives your organization the ability to note any other requirements for registering for this service or activity. This field helps assessors draw attention to the additional requirement when building the settlement plan with their client, but does not allow you to specify any details (such as *what* documentation may be required, or how long a waiting period may be). You may choose to elaborate on this in the description (8), if possible. Available options include:

    1. Application Process required
    2. Appointment Required
    3. Arrange home visit
    4. Call or walk-in/no appointment required
    5. Medical Authorization/documentation may be required
    6. No waiting period
    7. Waiting Period
    8. Must complete referral form
    9. Needs assessment Required

28. **Additional Information - Fees for Service:** If there is a fee for participating in this service/activity, please note that here. Note: You can only select yes/no from this dropdown. It is recommended that you include the fee amount in the description.

29. **Contact Information:** It is up to your organization what contact information should be included for each service/activity. This does not affect who receives referrals through the Partner Portal - it is only for the client and assessor's reference as it will be included in the settlement plan. It is recommended to include the contact responsible for bookings or inquiries. When in doubt, "reception" is always a good default.

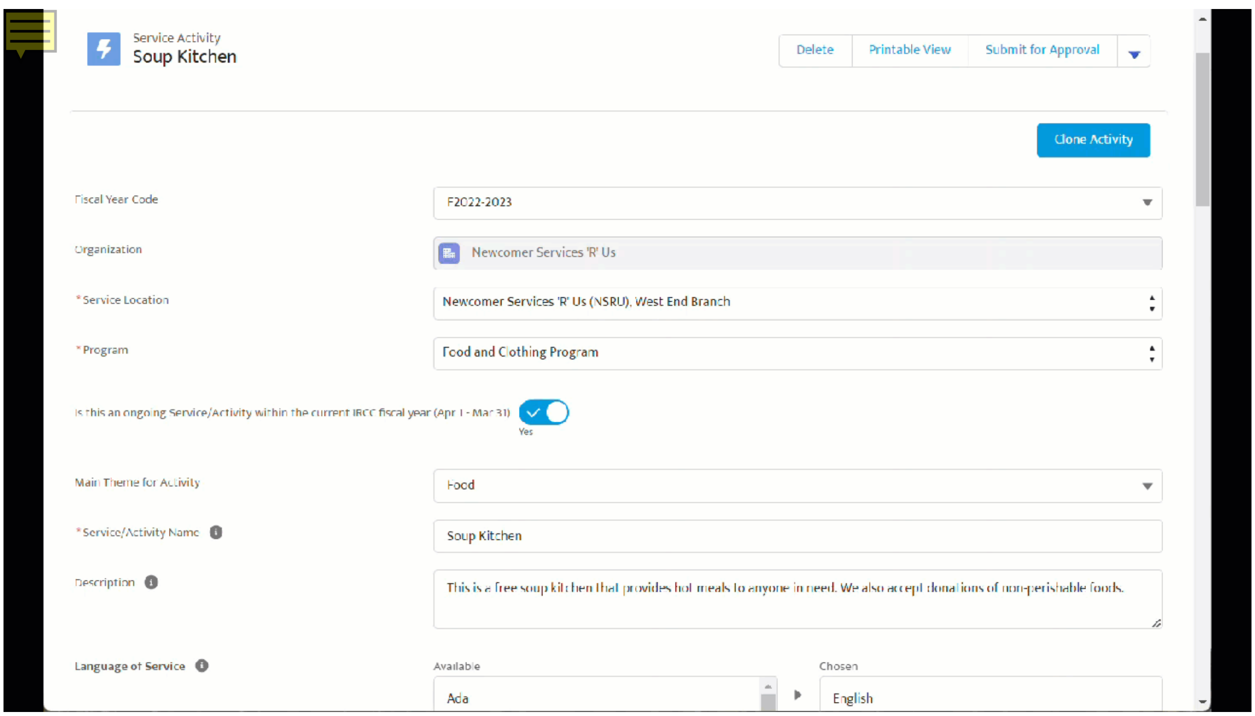
Editing “Service & Activities”

1. Cloning a Service/Activity

The GIF below demonstrates how the cloning feature can make building new services & activities easier. If you have two services or activities that are alike but with slight differences, you can use the clone feature to make a copy of the selected service/activity. When you use the clone feature, you will be given the option to choose which fields to copy, and which to replace.

Some fields will automatically be reset to the default, so be sure to review them before saving. These are:

- Fiscal Year Code
- Start Date and Time
- End Date and Time (if applicable)
- Available Days
- Language of Service



Popular use cases for cloning Services &Activities:

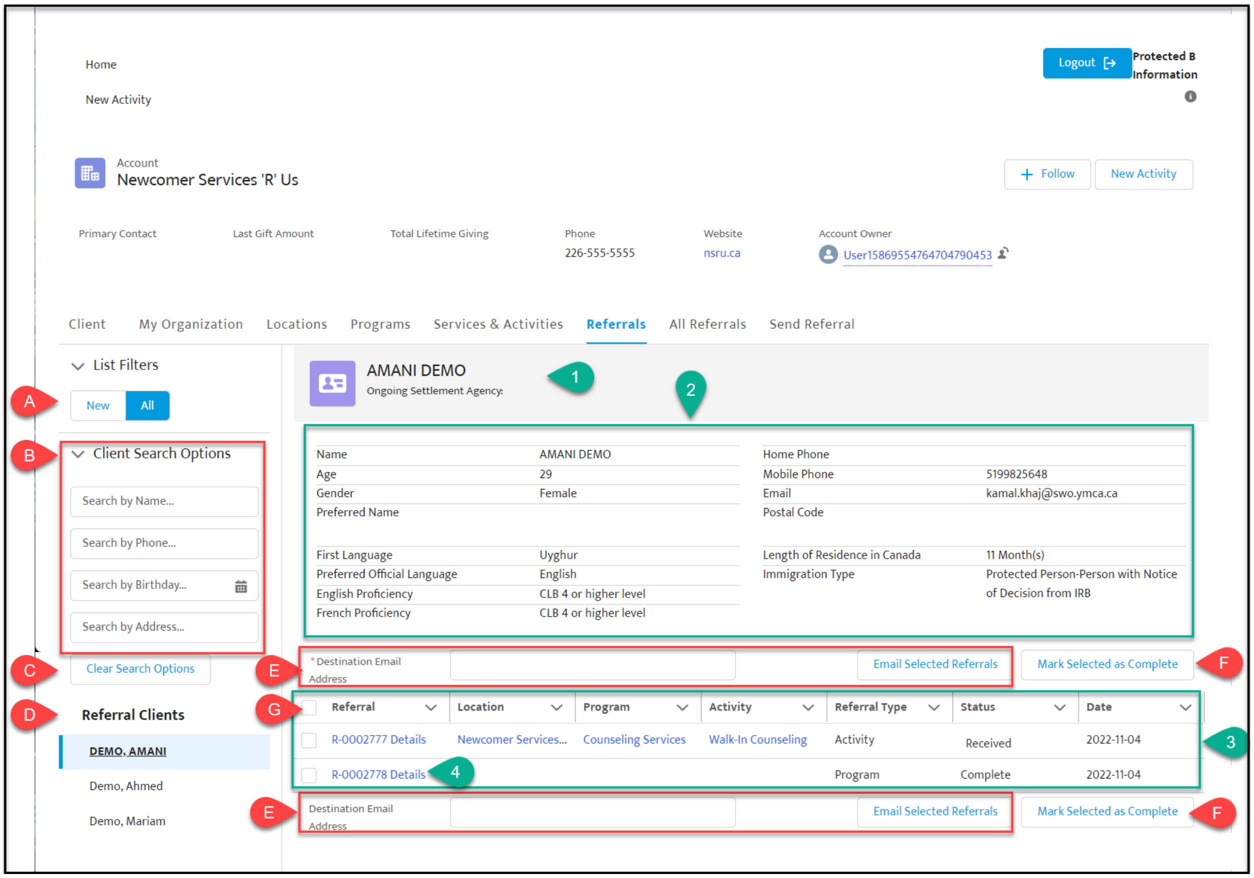
- Organizations that offer the same service in multiple locations
- Organizations that offer services in different languages on different days or times

Referrals

There are three separate tabs related to how your organization receives and sends referrals: *Referrals, All Referrals,* and *Send Referral.* All three are covered on this page. At the bottom of this we cover the Referral Details page of the Partner Portal.

"Referrals" Tab

This tab allows you to view and manage the referrals made to your organization, by client. If you want to view all the referrals made to your organization organized in a different way, navigate to the "All Referrals" tab (see below).



- "New" and "All" buttons: By default, this setting will usually be set to "New" each time you log into the Partner Portal. If your organization has received new referrals since your last login, you will see them at the bottom of this left sidebar (D). If you do NOT have any new referrals since your most recent login, you will not see any clients or referrals on this page as long as this button is on "New". By clicking "All," you can instead view the complete list of clients who have been referred to you (D), and search through their referrals on the right.

B - Client Search Options: If you are looking for a specific client, you can use these fields to help narrow down your search. This is particularly helpful when multiple clients have same or similar names.

C - Clear Search Options Button: This will reset the above fields (B) so you can view your list of clients unfiltered.

D - Referral Client List: This is where you will find the list of clients who have been referred to your organization. Results here will be listed alphabetically by last name and displayed as "Last Name, First Name". Remember: client names listed here will depend on whether you are viewing "new" referrals or "all" referrals (A). By cliking on a name, it will become a blue box, indicating this is the selected client. That client's information and referrals will be displayed to the right.

E - Email Selected Referrals: This feature allows Partner Portal users to forward a referral to the appropriate contact within your organization. To use this feature:

- Select the referral(s) you'd like to forward using the selection boxes (G)
- Input the email of the contact to whom you'd like to send the referral in the "destination email address" field.
- Click the "Email selected referrals" button.

This is particularly useful when there is a single user managing the Partner Portal for an organization - they can ensure the program coordinator or service/activity lead is aware of who has been referred, even if they do not have access to the Partner Portal.

F - Mark Selected as Complete: It is up to each organization to determine what defines "complete." This feature can help you and your organization keep track of the status of referrals. By default, they will appear in the "Status" column (#3) as "received". After clicking this button, the selected referral will be listed as "Complete".

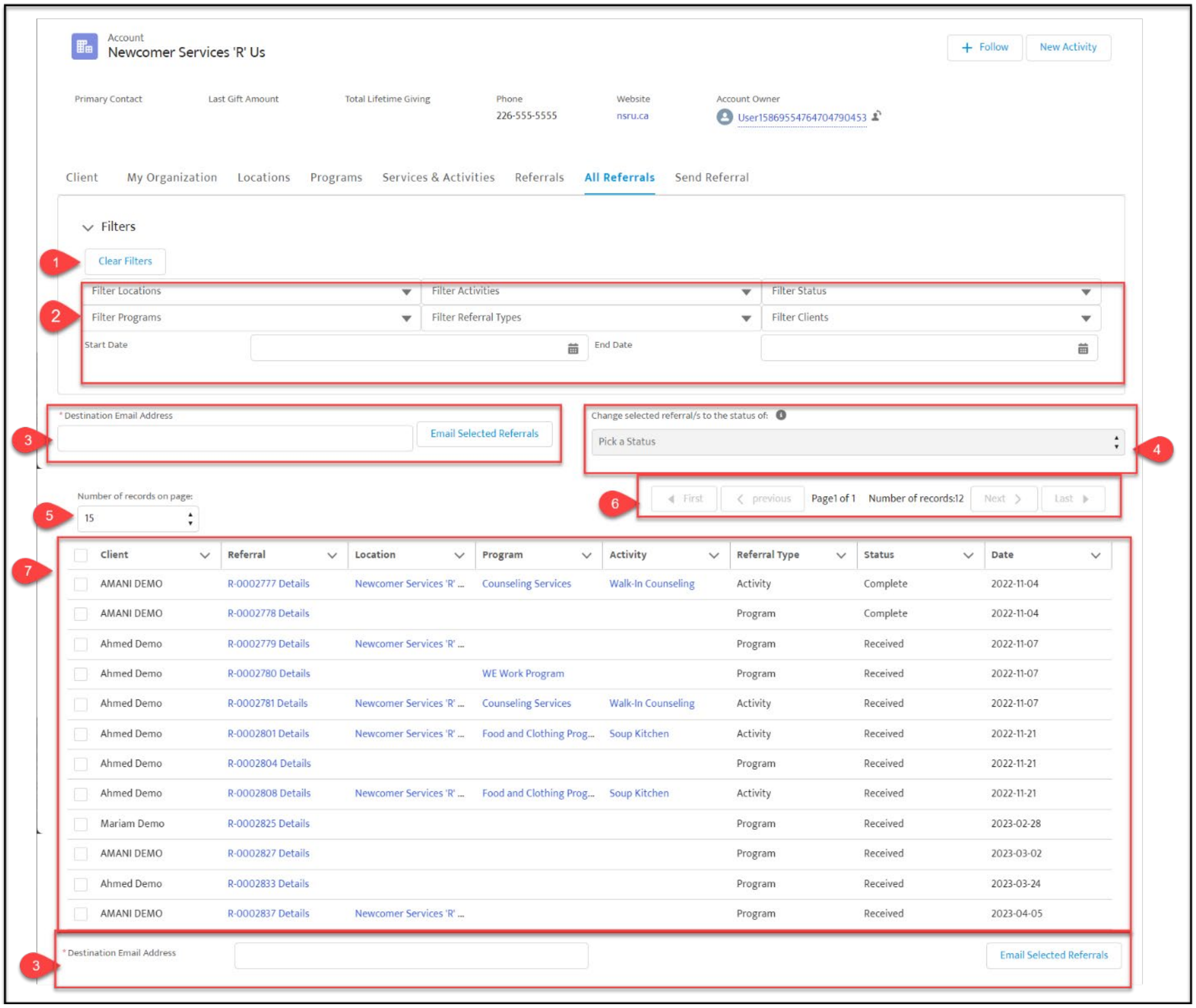
G - Selection Box: This checkbox will determine which referrals are affected by certain features, like emailing (E) and marking as complete (F). If an item has a check mark in this box, it is selected.

1. **Client Name Banner: T**he client's name, as selected in the "Referral Clients" list (D) will display as a banner across the top of the right side of the Referrals page.
2. **Client Basic Information:** The selected client's basic information will display in this section.
3. **Client Referrals List:** This area displays a list of all the selected client's referrals. The columns are categorized to provide you a snapshot of each referral's distinguishing characteristics: the service location, the program, the activity, the referral type, the status (see F) and the date it was sent.
4. **Referral Number (link):** Each referral has a unique number to support with tracking. In this list, the referral number is a link which, when clicked, will take

you to a page that contains all of that referral's details (see "Referral Details Page" below).

"All Referrals" Tab

Whereas the "Referrals" tab allows you to see referrals by client, this tab allows you to view a complete list of all referrals to your organization with the help of a variety of filters.



1. **Clear Filters:** When you have filters selected (#2), it will affect which records you are seeing in the list below (#7). To see your complete, unfiltered list of referrals or to reset the filters to apply new ones, click this button to remove the filters.

2. **Filters:** Use the dropdown menus for each filter to narrow down the list of referrals and see only those that match the criteria you are looking for. Referrals can be filtered by:

3. Location (choose from Location your organization has listed in the "Locations" tab.
4. Activities (choose from Activities your organization has listed in the "Services & Activities" tab.
5. Status (choose between "complete" and "received" referrals, based on how you have marked them in the referrals list (#7).
6. Programs (choose from Programs your organization has listed in the "Programs" tab.
7. Referral Type (whether the referral was made specifically at the program or activity level),
8. Client (choose from a list of clients). Note: If you are looking for referrals related to a specific client, it may be easier to find what you're looking for in the "Referrals" tab.
9. *Start Date (need clarification: is this for referral send date or program/service start date?)*
10. *End Date. need clarification: is this for referral send date or program/service end date?)*

Filtering can be especially useful when you are looking for all referrals that should be forwarded to a particular staff member, and when your organization receives a lot of referrals.

1. **Email Selected Referrals:** This feature allows Partner Portal users to forward a referral to the appropriate contact within your organization. To use this feature:
2. Select the referral(s) you'd like to forward using the selection boxes (G)
3. Input the email of the contact to whom you'd like to send the referral in the "destination email address" field.
4. Click the "Email selected referrals" button.

This is particularly useful when there is a single user managing the Partner Portal for an organization - they can ensure the program coordinator or service/activity lead is aware of who has been referred, even if they do not have access to the Partner Portal.

1. **Change Status:** Use this feature to change the status of selected referrals in the referral list (#7) between "received" and "complete". It is up to each organization to determine what defines "complete." This feature can help you and your organization keep track of the status of referrals. By default, they will appear in the "Status" column in the referrals list (#7) as "received".

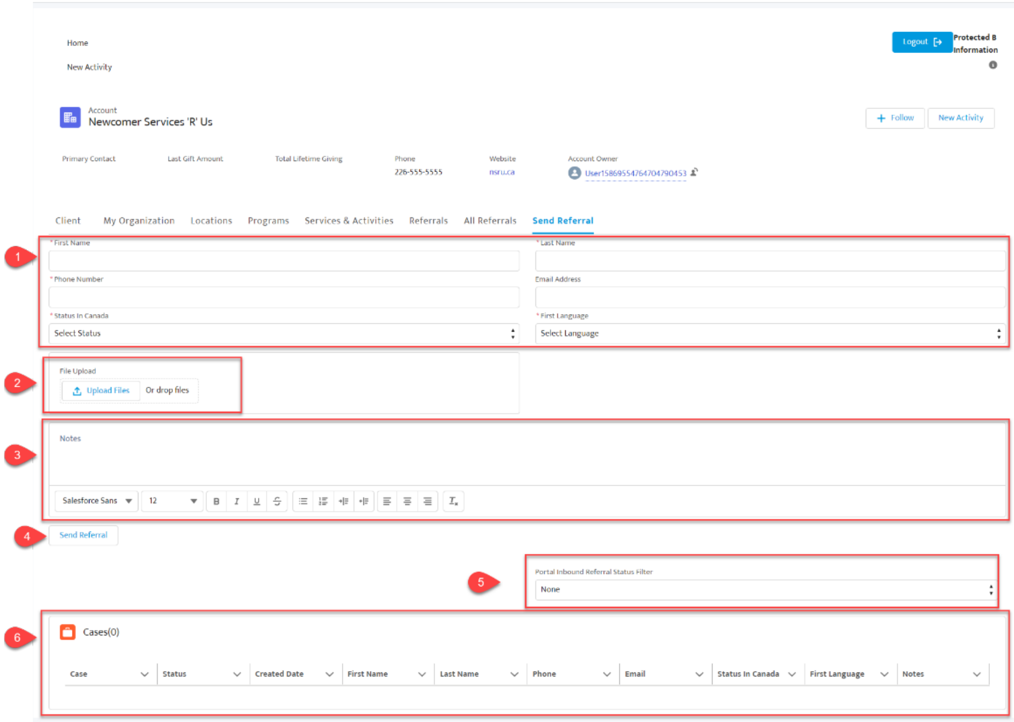
1. **Number of records on page:** This pagination feature was added based on feedback from organizations who receive a lot of referrals. It can sometimes slow down your computer to load all referrals in there are hundreds or thousands of referral records associated with your account. To avoid overwhelming the system and your computer, this feature allows you to determine how many referrals you will see in the list below (#7). You can then use the "Page number selection" feature (#5) to click back and forth through "pages" displaying the selected number or referrals.
2. **Page number Selection:** Based on the number or records per page you have selected to be visible (#4), you can sort through your referrals list page by page here.
3. **Referrals List:** This area displays a list of all the referrals to your organization, based on the filters you have selected above (#2), in pages divided by the number of referrals per page you have selected (#4). The columns are categorized to provide you a snapshot of each referral's distinguishing characteristics: the client name, referral number, service location, the program, the activity, the referral type, the status (see #4) and the date it was sent.

Each referral has a unique number to support with tracking. In this list, the referral number is a link which, when clicked, will take you to a page that contains all of that referral's details (see "Referral Details Page" below).

"Send Referral" Tab

If a Service Provider Organization (SPO) has a client who they feel would benefit from visiting a WE Value host organization to receive a the holistic WE Value Settlement Assessment and visionary settlement plan, they can refer clients to us through the Partner Portal. Each WE Value host organization is committed to referring back to the SPO for ongoing services.

NOTE: If your organization will be offering the client ongoing services as their "Primary Service Provider," you may be eligible for "Elevated View" which gives your organization access to more detailed client information, including full assessment results and the ability to see all referrals.

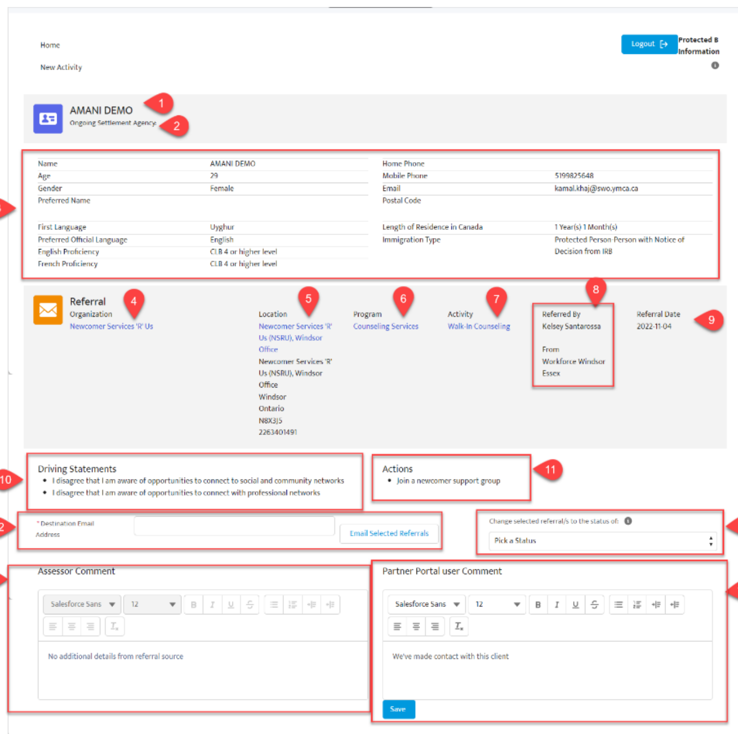


1. **Client Contact Information:** Use these fields to input information about the client you are referring to WE Value. The red asterisk marks a required field. Fields are:
    1. First Name (required)
    2. Last Name (required)
    3. Phone Number (required)
    4. Email Address
    5. Status in Canada (required) (dropdown menu: PR, PR application in process, Convention Refugee)
    6. First Language (required) (dropdown menu)
2. **File Upload:** If there are any documents you or the client would like to include with the referral, you can attach it here. Note: There is no WE Value client consent form for referral TO WE Value, but your organization may need client's consent in order to refer. You can include that signed consent form here.
3. **Notes Box:** Please use this box to make any additional notes that you or your client feel would be important to send with the referral.

4. **Send Referral Button:** When this button is clicked, all of the information and attached documents included above (#1-3) will be sent to the WE Value Partnership.
5. Portal Inbound Referral Status Filter:
6. Cases List:

Referral Details Page

When viewing a referral list, you will see a hyperlinked series of letters and digits indicating a referral number. Clicking this Referral Number will open a new page to view Referral Details.



1. **Client Name:** This is the name of the client whose referral you are viewing.
2. **"Ongoing Settlement Agency" notice:**
3. **Basic Client Details:** This box provides you with the basic information that accompanies referrals to affiliated partners -- NOTE: If your organization is the client's Primary Service Provider and you are signed up for "Elevated View," you can see more detailed information in the "Client" tab.
4. **Referral Organization:** This is the organization who received the referral. Most likely, you are looking at a referral to your organization. However, if you are a client's Primary Service Provider and are signed up for "Elevated View," you can view all referrals included in a client's settlement plan through the "Client" tab.

5. **Referral Service Location:** Referrals can be made at the Organization, Location, program, or Service/Activity level. If the client was referred to either a specific location, program, or service/activity, you will see the location they were referred to here.
6. **Referral Program:** Referrals can be made at the Organization, Location, program, or Service/Activity level. If the client was referred to either a specific program or service/activity, you will see the program they were referred to here.
7. **Referral Activity:** Referrals can be made at the Organization, Location, program, or Service/Activity level. If the client was referred to a specific service/activity, you will see which one they were referred to here.
8. **Referred by:** This is the name of the assessor or K2 Pathway to Settlement System administrator who made the referral on behalf of the client.
9. **Referral Date:** This is the date the referral was made.
10. Driving Statements: This is the rationale for the referral. After a client does their WE Value Settlement Assessment, their questionnaire responses are turned into "driving statements". For example, if they respond "NO" to the question "Have you had your language skills assessed?" then the driving statement becomes "I have not had my language skills assessed". There can be more than one driving statement attached to one or more actions and referrals.
11. **Actions:** This is the settlement action identified by the client and assessor which this referral is meant to satisfy. One or more referrals can be assigned to one or more actions, which can be assigned to one or more driving statements. For example, the action assigned to the driving statement "I have not had my language skills assessed" would likely be "Have language skills assessed".
12. **Forward Referral:** This feature allows Partner Portal users to forward a referral to the appropriate contact within your organization. To use this feature:
    1. Input the email address of the contact you wish to receive the referral.
    2. Click the "Email Selected Referrals" button
13. **Referral Status Change:** Use this feature to change the status of selected referral between "received" and "complete". It is up to each organization to determine what defines "complete." This feature can help you and your organization keep track of the status of referrals. By default, they will appear as "received".
14. **Assessor Comment:** This feature allows assessors at the WE Value host organization to leave a comment for the receiving organization at the time of referral when building the settlement plan.

15. **Partner Portal User Comment:** This feature allows partners to add a comment on the referral which can be seen by the assessor (or K2 administration) at the WE Value host organization. **DON'T FORGET TO CLICK THE "SAVE" BUTTON TO SUBMIT A COMMENT.

Clients (Elevated View)

The "Client" Tab gives eligible Partner Portal users who are registered for "Elevated View" the ability to see more detailed Client Information if they are designated a client's Primary Service Provider.

On behalf of the entire WE Value Partnership, we are excited to announce that in Spring of 2023, we are launching the Elevated View experience through the WE Value Partner Portal. This new experience will provide opportunities for deeper collaboration and coordination among IRCC-funded organizations, by ensuring that essential client details can be shared digitally. For clients, and front-line staff, we hope that this improves intake processes and overall service coordination, and that it reduces the need for clients to re-tell their stories to their primary service providers post WE Value initial assessment.

What is Elevated View?

For IRCC-funded organizations with a WE Value Partner Portal account, clients grant permission to share their information with their ongoing settlement agency. Elevated View gives access to the following, captured through the WE Value Settlement Assessment:

- Client Profile (Immigration, Personal, Education, and Employment information)
- Client Referrals (A look at all referrals made, including their status)
- Client Assessment (Summary of assessment responses over 14 categories of settlement, and an overview of their identified skills and capacities)

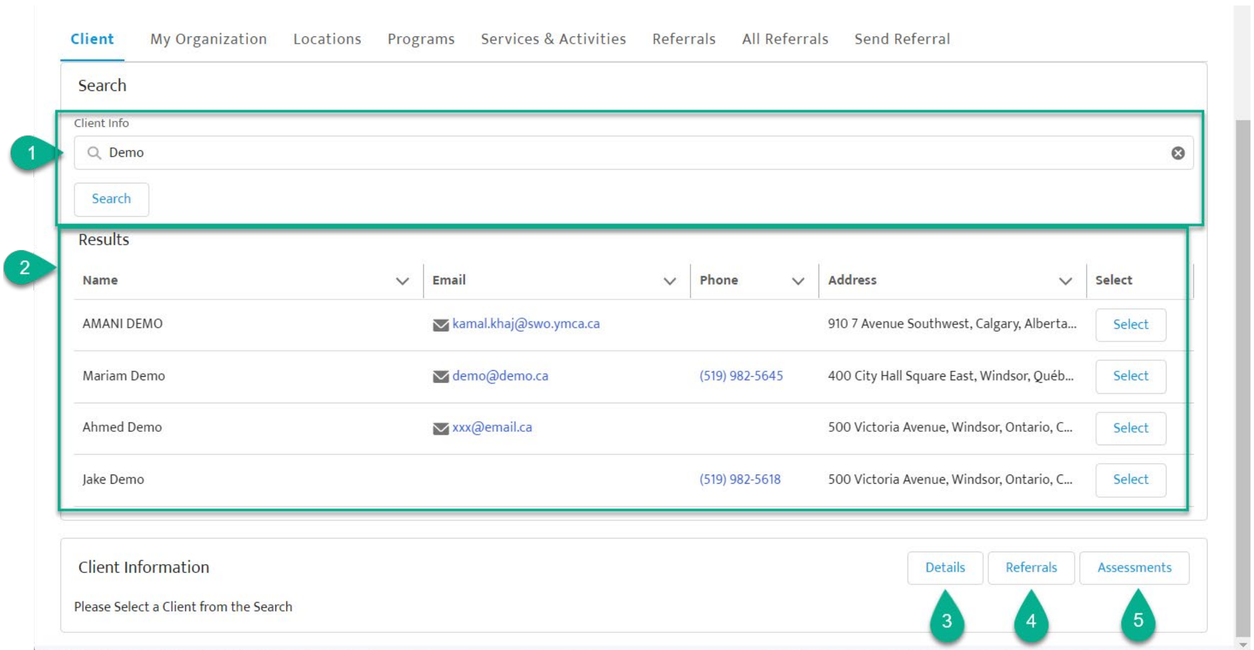
We hope that this new feature helps us to assess effective approaches to client file sharing to facilitate service coordination.

How to Use Elevated View

When you are given Elevated View permissions to a Client's profile in the K2 Pathway to Settlement System, you will be able to access the information from this "Client" tab by searching for the client's name. Once a client is selected, the lower part of the page will populate with information. There are three different "views" you can see when looking at a selected client's information: Details, Referrals, and Assessments.

Clients can choose which information their Primary Service Provider has access to; your organization could see the data from one, two, or all three of those View categories, depending on the client's desired permission settings. The client can change their mind at any time and request to remove Elevated View permissions, in which case your organization would no longer have access to the information on this page. However, you can still see any referrals made to you in the referrals tab.

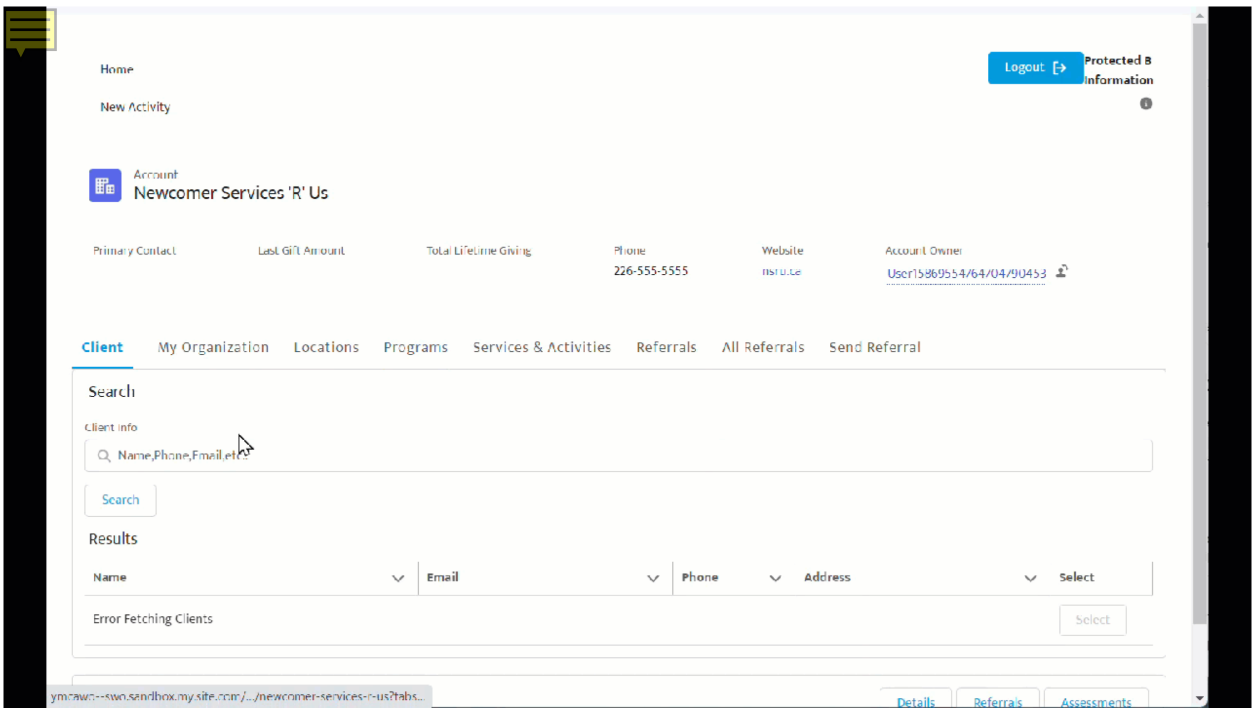
Searching and Selecting a Client



1. **Search Bar:** To view a client's information through Elevated View, you will need to search for the client by name. Type in the name of the client you are looking for here.
2. **Search Results:** Based on the search in the search bar (#1), a list of results will open below, and you can then select the appropriate client. In this case, the surname "Demo" opens a list of clients with that last name. By clicking "Select" on the appropriate client, the Client Information section below will expand to show that client's information. If you have Elevated View permissions for that client, you will be able to toggle between "Details" View, "Referrals" view, and "Assessments" view. If not, you will only see basic information.

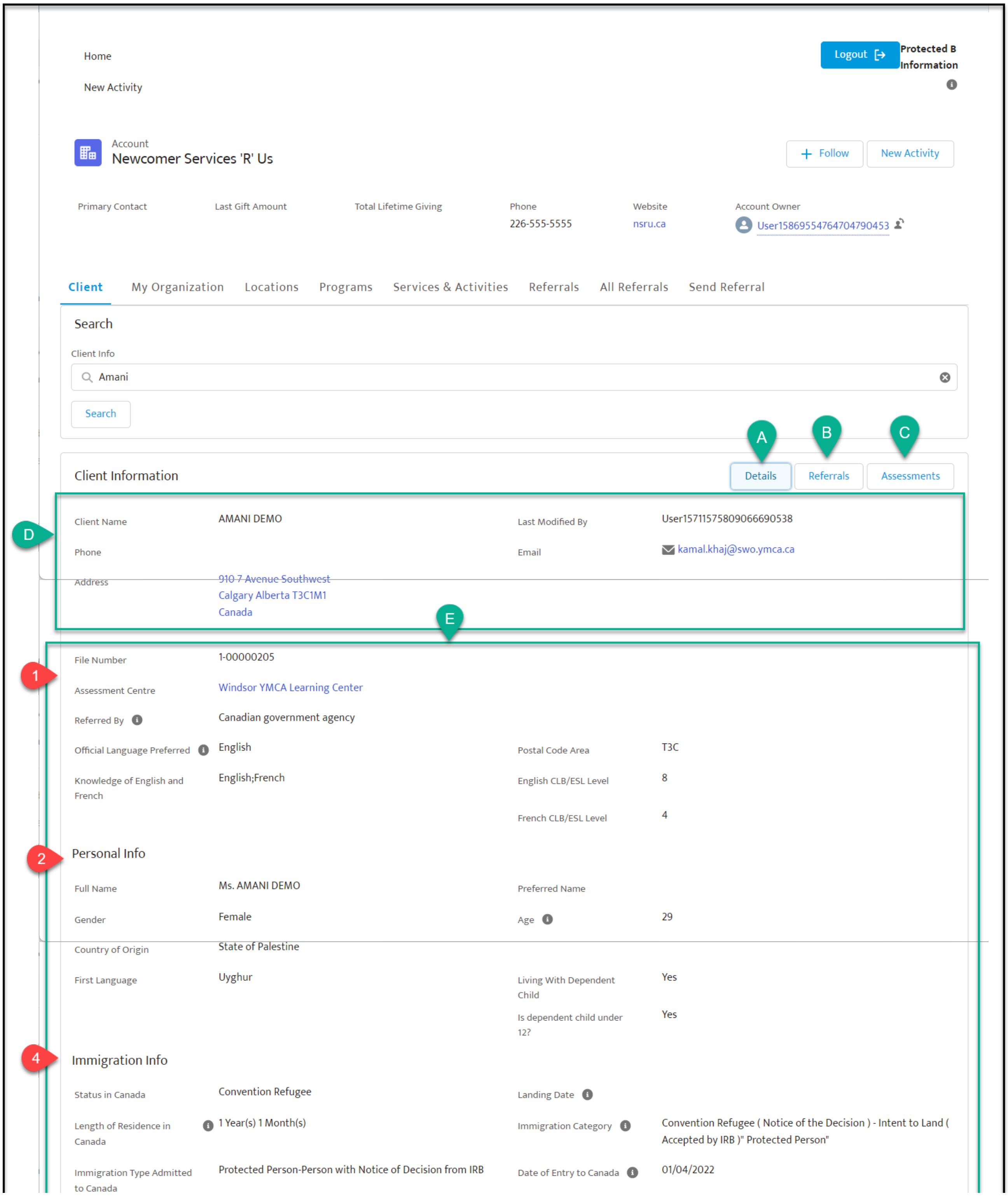
3. **Details Button:** If you have Elevated View permissions for the selected client, you can click this button to view a client's detailed information (see "Details View" below).
4. **Referrals Button:** If you have Elevated View permissions for the selected client, you can click this button to view a client's complete list of referrals included in their settlement plan (see "Referrals View" below).
5. **Assessments Button:** If you have Elevated View permissions for the selected client, you can click this button to view the results from a client's WE Value Settlement Assessment (see "Assessments View" below).

The following GIF demonstrates how to search for a client and toggle between views.



Details View

This View provides you with all client details captured in the K2 Pathway to Settlement System, including contact information, personal Information, immigration information, education history, employment history, and language. This information is captured pre-assessment upon creating the Client Profile.



5 Second Migration

Second Migration	Second Migration
First Province lived in	AB - Alberta
First City	Calgary
Relocation Date	12/07/2022

6 Current Address on File

Type of Housing	Renting not subsidized	Housing Status	Permanent (buying, renting, etc.)
Mailing Address	910 7 Avenue Southwest Calgary Alberta T3C1M1 Canada		

7 Contact Info

Email	kamal.khaj@swo.ymca.ca
Business Phone	
Mobile Phone	(519) 982-5648

8 Background Summary

Highest Level Of Education	Degree in dentistry, medicine, veterinary medicine, optometry,law or theology		
Work Experience In Canada (Years)	0.00	Work Experience Outside Canada (Years)	0.25
English Assessed	Yes	English Language Proficiency	CLB 4 or higher level
French Assessed	Yes	French Language Proficiency	CLB 4 or higher level

9 File Status

File Closed	No	File Closed Date	

10 Education

Level of Education	Field of Study	Country	I..	L...	D..	E..
Master's Degree	Architecture and related services	Albania		No	Yes	In pr...
High school graduation		American S...		No	Yes	Yes
Degree in dentistry, medicine, veterinary medicine, optometry,law or theo...	Aboriginal and foreign languages, literatures and lingui...	Afghanistan		Yes	Yes	Yes
Some high school		Algeria		No		

11 Employment

Work Experience	D.	Ye...	Skill Type	Co...	Level	W	S..	F..
0014 labour organization pres...		None	0 - Senior management	Canada	O - Management occupa...		No	No
7321 car mechanic		0-3 mo...	7 - Trades, transport and equipment operators and related occu...	Afghani...	B - Skilled and technical	Full-...	Yes	Yes

12 Language

Language	Is F...	CLB Level	En...	S..	Speaking	Writing	Reading
Arabic	Yes				Fluent	Fluent	Fluent
English	No	8			Functional	Functional	Functional
English	No	2	No		Fluent	Fluent	Fluent
English	No	Has not been assessed	No		Fluent	Fluent	Fluent

A. Details Button: If you have Elevated View permissions for the selected client, you can click this button to view a client's detailed information (see "Details View" below). In this example, this is the selected View, so the information visible below (E, #1-12) reflects this.

B. Referrals Button: If you have Elevated View permissions for the selected client, you can click this button to view a client's complete list of referrals included in their settlement plan (see "Referrals View" below).

C. Assessments Button: If you have Elevated View permissions for the selected client, you can click this button to view the results from a client's WE Value Settlement Assessment (see "Assessments View" below).

D. Basic Client Information: Just below the View buttons is a client's basic client information, similar to what would be seen in referral details. This is to help you ensure at a glance that you are looking at the correct client, and will remain the same for each "view," as well as when your organization does not have Elevated View permissions.

E. Elevated View Information: All of the data that is shown below Basic Client Information (#1- 12) is only visible with Elevated View permissions. What you see here will depend on which of the three "views" is selected (see buttons A, B, and C).

1. **File Information:** This is high-level information as found in client's profile in K2, including: the name of the location where their assessment was conducted, how they were referred to WE Value, preferred language, and CLB.
2. **Personal Info:** This information includes private information like age, country of origin, and dependents.
3. **Immigration Info:** This is information related to a client's immigration status and arrival details.
4. **Second Migration:** If the selected client lives in a location secondary to where they initially settled, that information is included here.
5. **Current Address on File:** A client's current address will appear here and will be changed in real-time when and if their address is updated.
6. **Contact Info:** The client's email and phone number(s) appear here as they are in their client profile.
7. **Background Summary:** Although more detailed information on language ability, education, and employment history can be seen below (#9-11) with the client's permission, this section of Elevated View provides a snapshot of that information.
8. **File Status:** This designates whether or not a client's WE Value file is closed by the host organization.

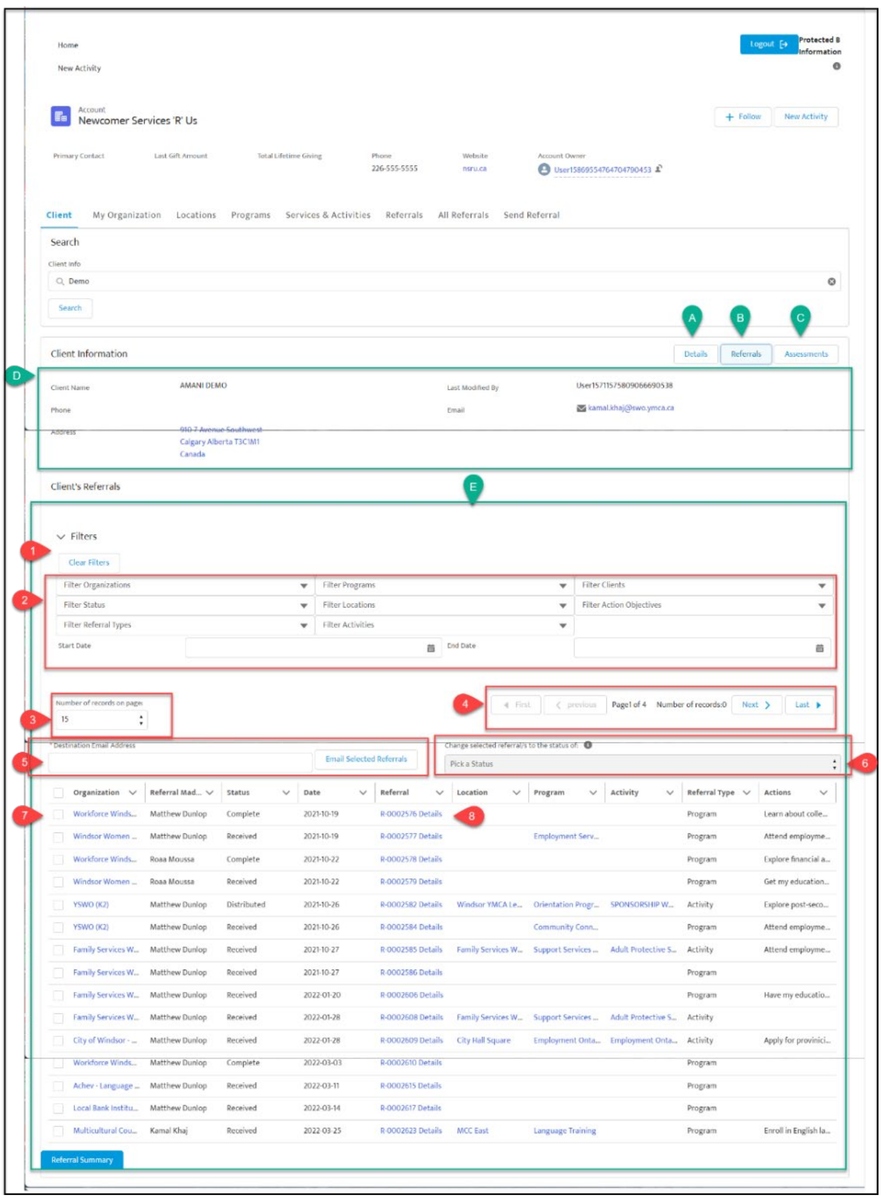
9. **Education:** This list provides detailed information on a client's education history. Each row represents a different level of education, degree, or certificate, with details in columns. Columns can be resized to better read the data information included. The columns are:
    1. Level of Education
    2. Field of Study
    3. Country
    4. Institution
    5. Level (Yes/No)
    6. Degree (Yes/No)
10. **Employment:** This list provides detailed information on a client's employment history. Each row represents a different employment experience with details in columns. Columns can be resized to better read the data information included. The columns are:
    1. Work Experience (title and NOC code)
    2. Description
    3. Years
    4. Skill Type (umbrellas under NOC codes that categorize skills)
    5. Country
    6. Skill Level
        1. O: Management Jobs
        2. A: Professional Jobs that usually require a University Degree
        3. B: Technical Jobs and skilled trade jobs that usually require a College Diploma)
        4. C: intermediate jobs that usually require high school education or specific job training)
    7. Working (Full time, part time, etc.)
    8. Seeking Job (Yes/No)
    9. Future Desired (Yes/No)
11. **Language:** This list provides detailed information on a client's Language Abilities. Each row represents a different language with details in columns.

Columns can be resized to better read the data information included. The columns are:

1. Language
2. Is First Language (Yes/No)
3. CLB (Canadian Language Benchmark) Level
4. Enrolled (Yes/No)
5. School
6. Speaking (Fluent/Functional)
7. Writing (fluent/functional)
8. Reading (fluent/functional)

Referrals View

This feature is identical to the All Referrals page with the exception that as a Primary Service Provider with Elevated View permissions, your organization can see all of the referrals included in the client's settlement plan -- not just those to your organization.



A. Details Button: If you have Elevated View permissions for the selected client, you can click this button to view a client's detailed information (see "Details View" above).

B. Referrals Button: If you have Elevated View permissions for the selected client, you can click this button to view a client's complete list of referrals included in their settlement plan. In this example,"Referrals" is the selected View, so the information visible below (E, #1-6) reflects this.

C. Assessments Button: If you have Elevated View permissions for the selected client, you can click this button to view the results from a client's WE Value Settlement Assessment (see "Assessments View" below).

D. Basic Client Information: Just below the View buttons is a client's basic client information, similar to what would be seen in referral details. This is to help you ensure at a glance that you are looking at the correct client, and will remain the same for each "view," as well as when your organization does not have Elevated View permissions.

E. Elevated View Information: All of the data that is shown below Basic Client Information (#1- 6) is only visible with Elevated View permissions. What you see here will depend on which of the three "views" is selected (see buttons A, B, and C).

1. **Clear Filters:** When you have filters selected (#2), it will affect which records you are seeing in the list below (#7). To see your complete, unfiltered list of referrals or to reset the filters to apply new ones, click this button to remove the filters.
2. **Filters:** Use the dropdown menus for each filter to narrow down the list of referrals and see only those that match the criteria you are looking for. Referrals can be filtered by:
3. Location (choose from Location your organization has listed in the "Locations" tab.
4. Activities (choose from Activities your organization has listed in the "Services & Activities" tab.
5. Status (choose between "complete" and "received" referrals, based on how you have marked them in the referrals list (#7).
6. Programs (choose from Programs your organization has listed in the "Programs" tab.
7. Referral Type (whether the referral was made specifically at the program or activity level),
8. Client (choose from a list of clients). Note: If you are looking for referrals related to a specific client, it may be easier to find what you're looking for in the "Referrals" tab.

9. *Start Date (need clarification: is this for referral send date or program/service start date?)*
10. *End Date. need clarification: is this for referral send date or program/service end date?)*

Filtering can be especially useful when you are looking for all referrals that should be forwarded to a particular staff member, and when your organization receives a lot of referrals.

1. **Number of records on page:** This pagination feature was added based on feedback from organizations who receive a lot of referrals. It can sometimes slow down your computer to load all referrals in there are hundreds or thousands of referral records associated with your account. To avoid overwhelming the system and your computer, this feature allows you to determine how many referrals you will see in the list below (#7). You can then use the "Page number selection" feature (#4) to click back and forth through "pages" displaying the selected number or referrals.
2. **Page number Selection:** Based on the number or records per page you have selected to be visible (#3), you can sort through your referrals list page by page here.
3. **Email Selected Referrals:** This feature allows Partner Portal users to forward a referral to the appropriate contact within your organization. To use this feature:
4. Select the referral(s) you'd like to forward using the selection boxes (G)
5. Input the email of the contact to whom you'd like to send the referral in the "destination email address" field.
6. Click the "Email selected referrals" button.

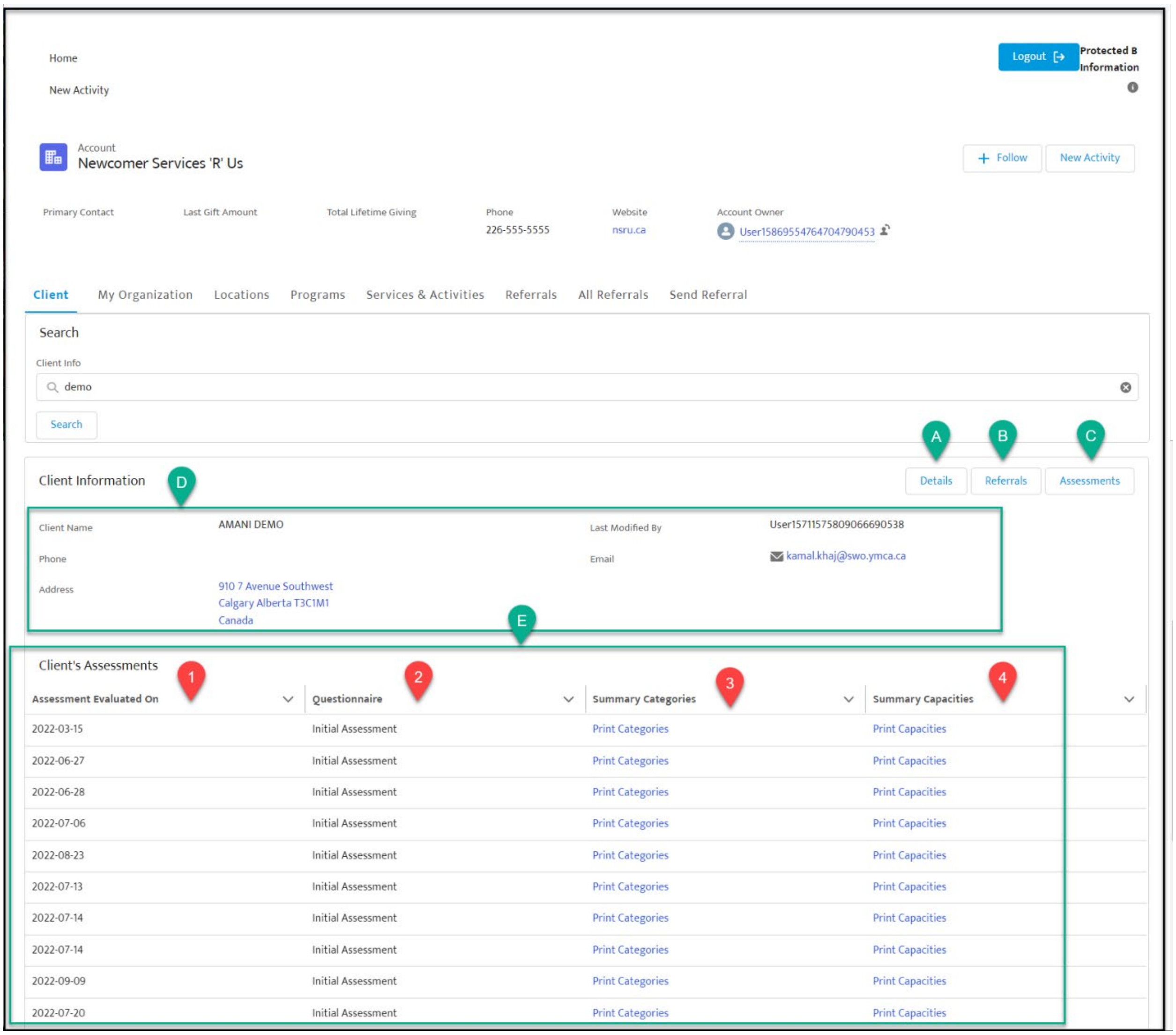
This is particularly useful when there is a single user managing the Partner Portal for an organization - they can ensure the program coordinator or service/activity lead is aware of who has been referred, even if they do not have access to the Partner Portal.

1. **Change Status:** Use this feature to change the status of selected referrals in the referral list (#7) between "received" and "complete". It is up to each organization to determine what defines "complete." This feature can help you and your organization keep track of the status of referrals. By default, they will appear in the "Status" column in the referrals list (#7) as "received".

2. **Referrals List:** This area displays a list of all the referrals to your organization, based on the filters you have selected above (#2), in pages divided by the number of referrals per page you have selected (#4). The columns are categorized to provide you a snapshot of each referral's distinguishing characteristics: the client name, referral number, service location, the program, the activity, the referral type, the status (see #4) and the date it was sent.
3. **Referral Number:** Each referral has a unique number to support with tracking. In this list, the referral number is a link which, when clicked, will take you to a page that contains all of that referral's details (see the "Referral Details" section of the "Referrals" page).

Assessments View

Here, an organization with Elevated View permissions can see a client's results from their holistic, capacity-focused WE Value Settlement Assessment.



B. Referrals Button: If you have Elevated View permissions for the selected client, you can click this button to view a client's complete list of referrals included in their settlement plan. (See "Referrals View" above).

C. Assessments Button: If you have Elevated View permissions for the selected client, you can click this button to view the results from a client's WE Value Settlement Assessment. In this example, "Assessments" is the selected View, so the information visible below (E, #1-6) reflects this.

D. Basic Client Information: Just below the View buttons is a client's basic client information, similar to what would be seen in referral details. This is to help you ensure at a glance that you are looking at the correct client, and will remain the same for each "view," as well as when your organization does not have Elevated View permissions.

E. Elevated View Information: All of the data that is shown below Basic Client Information (#1- 6) is only visible with Elevated View permissions. What you see here will depend on which of the three "views" is selected (see buttons A, B, and C).

1. **Assessment Date:** This assessment with which the information in this row is associated was conducted on the date in this column.
2. **Questionnaire:** This column indicates which type of assessment information in this row represents: an initial assessment, a follow-up, etc.
3. **Summary Categories:** When the assessment was conducted, the client's responses were categorized. Clicking the link found in this column will open up a new browser tab or window which allow you to view the client's assessment results by category.
4. **Summary Capacities:** When the assessment was conducted, some of the client's responses were identified as capacities. Clicking the link found in this column will open up a new browser tab or window which will allow you to view the client's list of capacities.

Support

Questions about WE Value Partnership or the Partner Portal?

Having trouble logging in?

Need a password reset?

Contact your WE Value Community Engagement Coordinator

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