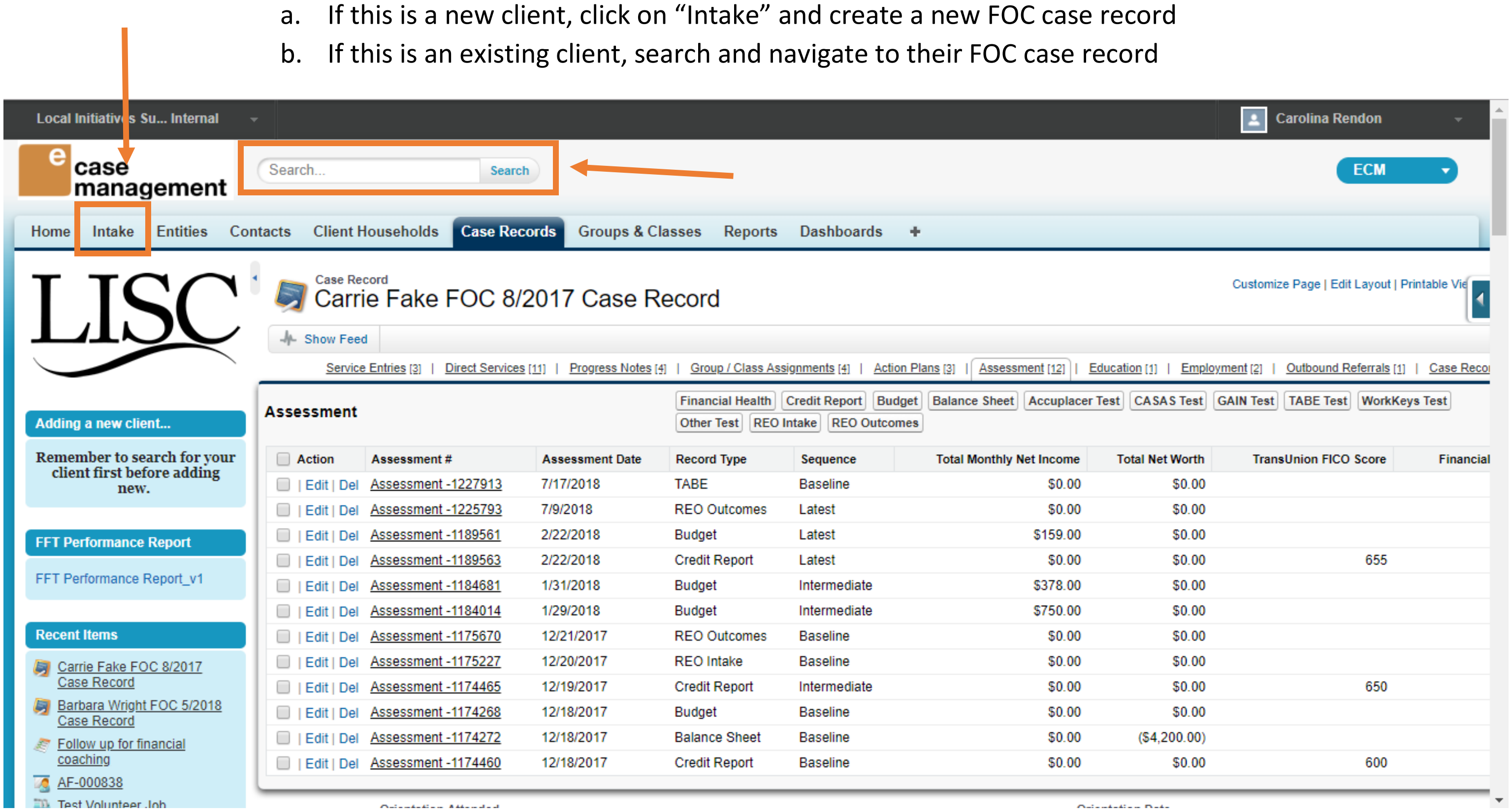
REO Salesforce Guide

Purpose: This guide provides step by step instructions for entering DOL-REO specific data into Salesforce from enrollment through follow up. If you have further questions, please reach out to Jackie Guzman at jguzman@lisc.org , the salesforce support email at FFTfocsupport@lisc.org , or join our regular Salesforce Support Webinars on the 1st and 3rd Monday of every month. More information can be found at www.Foc-network.org .

Create/ Find your client's case record

1. Before creating a new case record always remember to search for your client to avoid having duplicate records.
    a. If this is a new client, click on "Intake" and create a new FOC case record
    b. If this is an existing client, search and navigate to their FOC case record



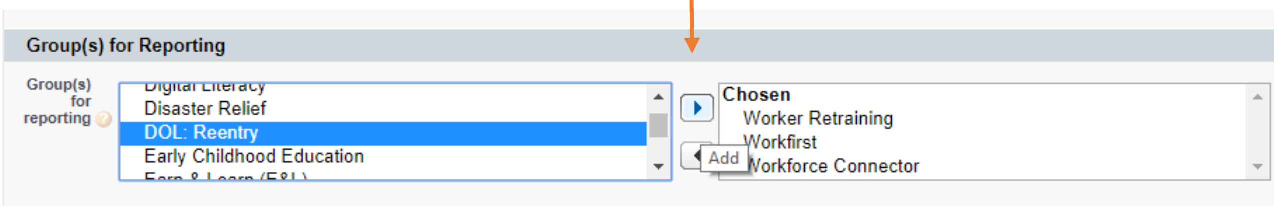
Enrolling your client:

To enroll your client for this grant you must first (1) add them to the "DOL: Reentry" Group(s) for Reporting and then (2) complete a REO intake assessment.

Adding client to "Group(s) for Reporting":

1. From your clients FOC case record click on "edit" located either at the top and bottom of the record.
2. Navigate to the "Group(s) for Reporting" section of the case record

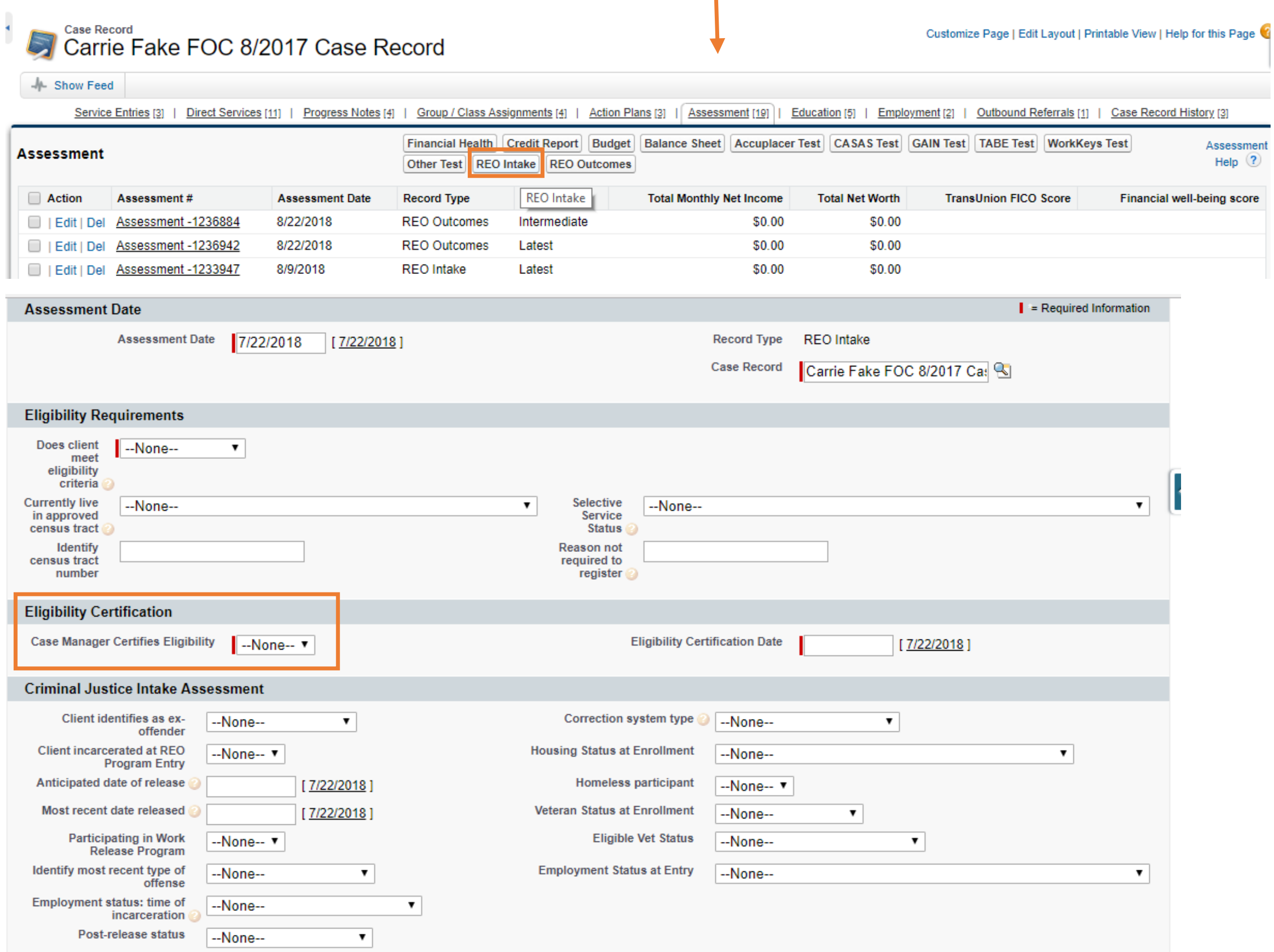
3. Find and select “DOL: Reentry” in the “Available” box and use the arrow button to move that selection to the “Chosen” box
4. Then click “Save”



Completing a REO Intake Assessment:

The REO intake assessment should only be complete once staff members are able to certify that their clients meets all of the eligibility criteria and all documentation is in the participant’s paper file, per the eligibility checklist. By certifying the client’s eligibility you are signing off that you also have all the necessary back up documentation to prove eligibilty during an audit.

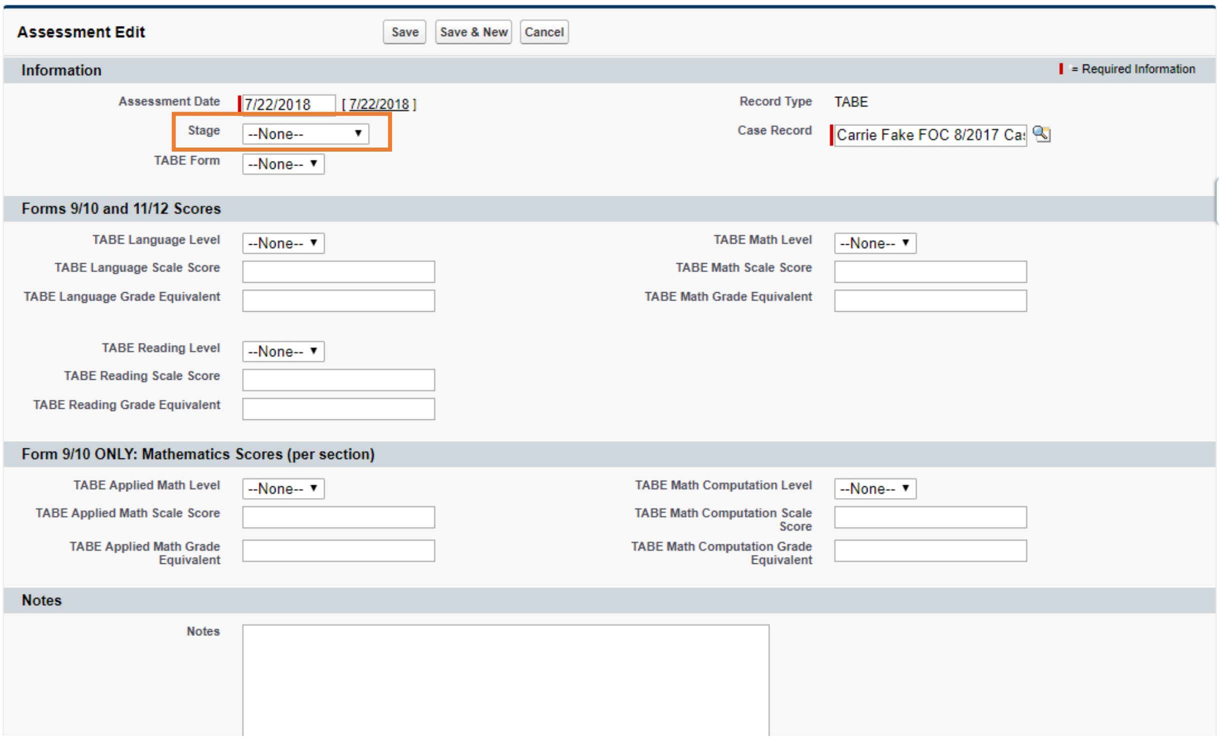
1. Navigate to assessment by hovering over the “Assessment” tab located on your client’s case record.
2. Click on REO intake



3. Fill in all fields to the best of your ability. All criminal justice questions should be part of your intake process for this grant.

Record program entry tests (pre and post):

Both Pre-test and Post-test are required in order to track measurable skill gains. Anyone one of the following skills test are acceptable: TABE/GAIN/WORKKEYS/ACCUPLACER/CASAS/OTHER (Northstar etc.)



1. Hover over the "Assessment" tab from your client's case record
2. Click on whichever test is used at your site. For example, "TABE test" below

REQUIRED field- "Stage" is important so that we can distinguish between pre and post test

<u>Record BCO and Vocational Training:</u>

Note that even if this training is happening concurrently with contextualized bridge you must record two separate education records: (1) For BCO: Contextualized bridge education and (2) for the Vocational/ Occupational skills training.

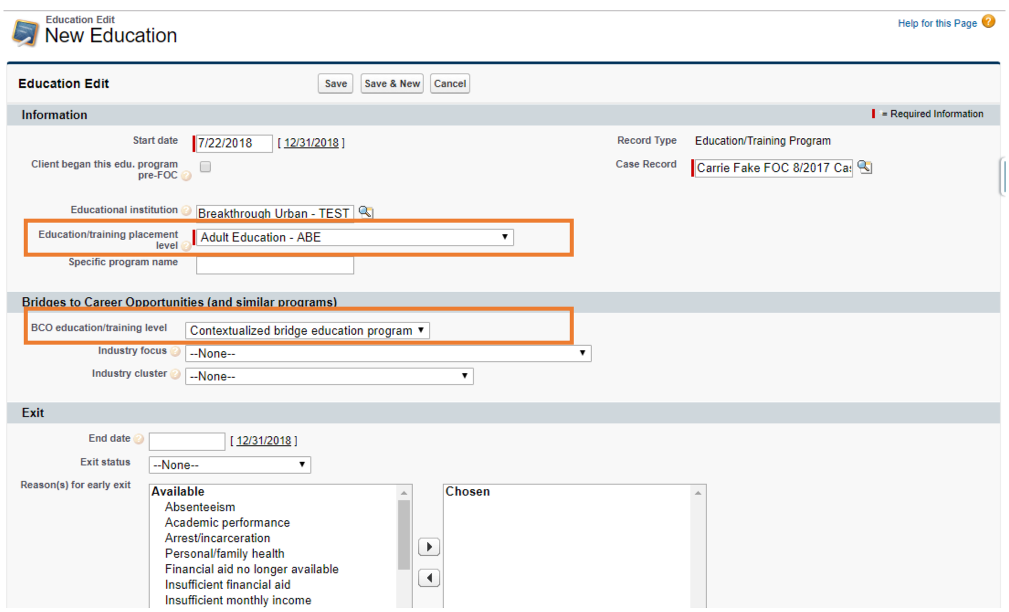
Record BCO/ contextualized bridge training:

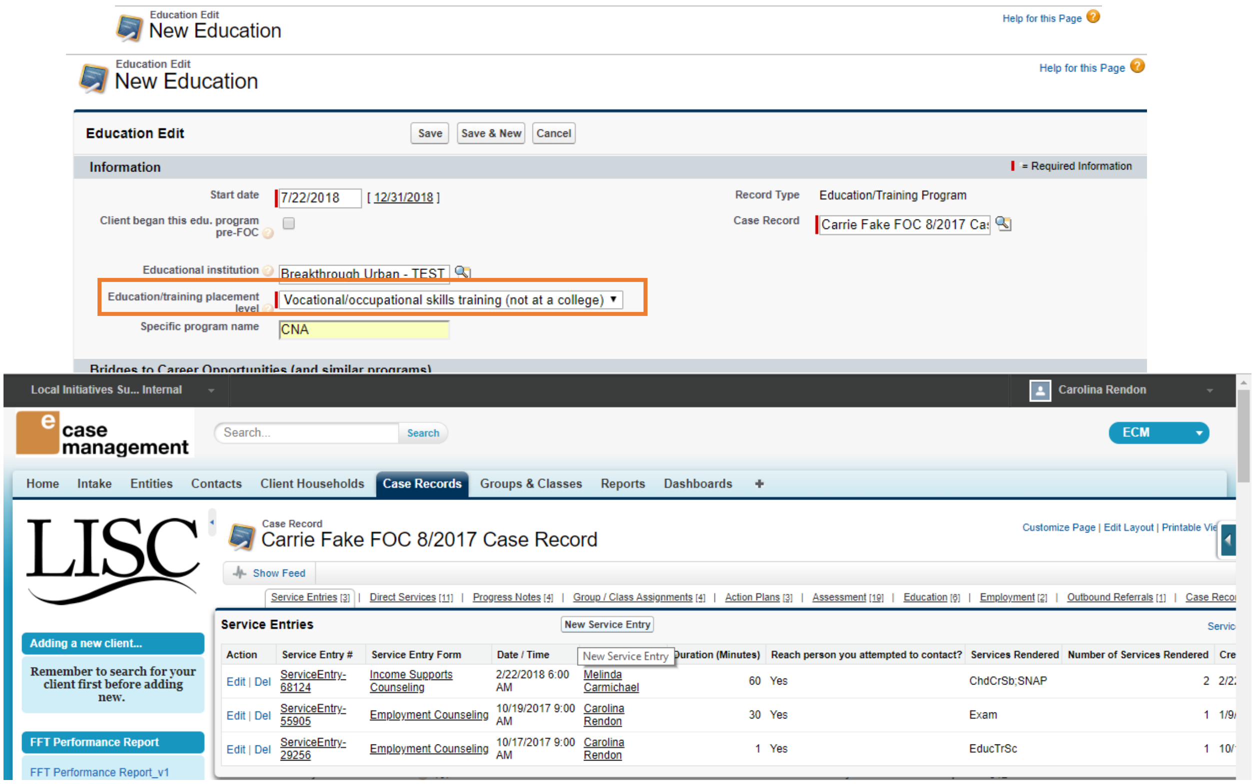
1. From your client's case record, hover over the "Education" tab
2. Click on "Education/Training Program"

3. For the “Education/Training placement level” select that ABE level that applies. (See screen shot below)
4. In the “Bridges to Career Opportunities” section of this record in the field “BCO education/training level” select “Contextualized bridge education program”
5. Fill in all other fields if information is available. The more information we have the better our reporting will be to the Department of Labor.

Record Vocational/occupational skills training:

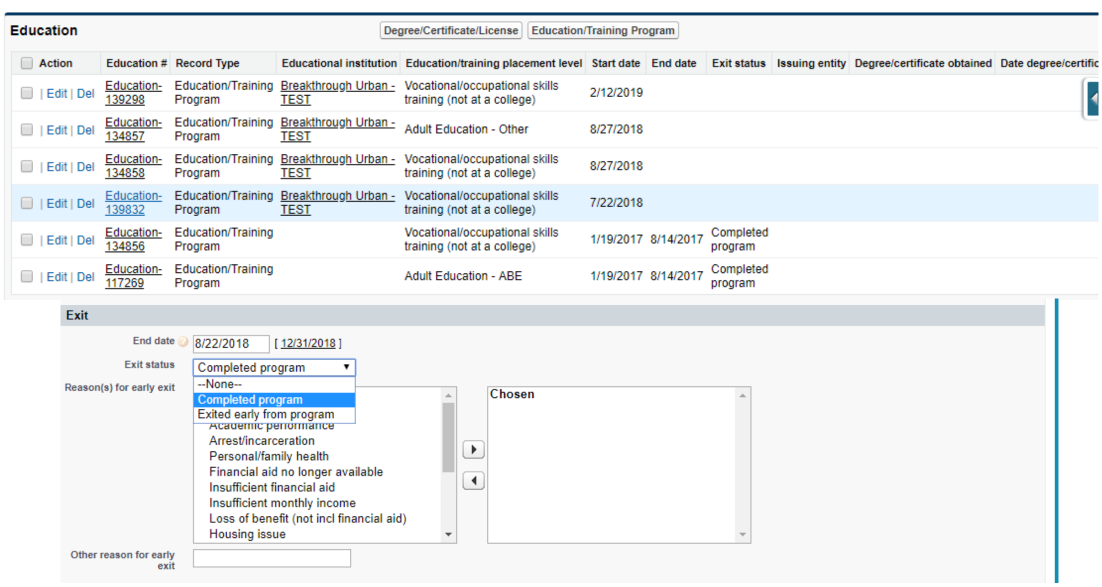
6. From your client’s case record, hover over the “Education” tab
7. Click on “Education/Training Program” (If training is Concurrent with Bridge, you could instead clone the existing education record and make the changes below)
8. For the “Education/Training placement level” select “Vocational/Occupational skills training”
9. In the “Bridges to Career Opportunities” section of this record in the field “BCO education/training level” select “Occupational Skills Training”
10. Fill in all other fields if information is available. The more information we have the better our reporting will be to the Department of Labor.





Record training completion or termination:

1. From your client's case record, hover over education or scroll down to eduction section and find the education record you are looking for.
2. Click on the "edit" link next to that Education record



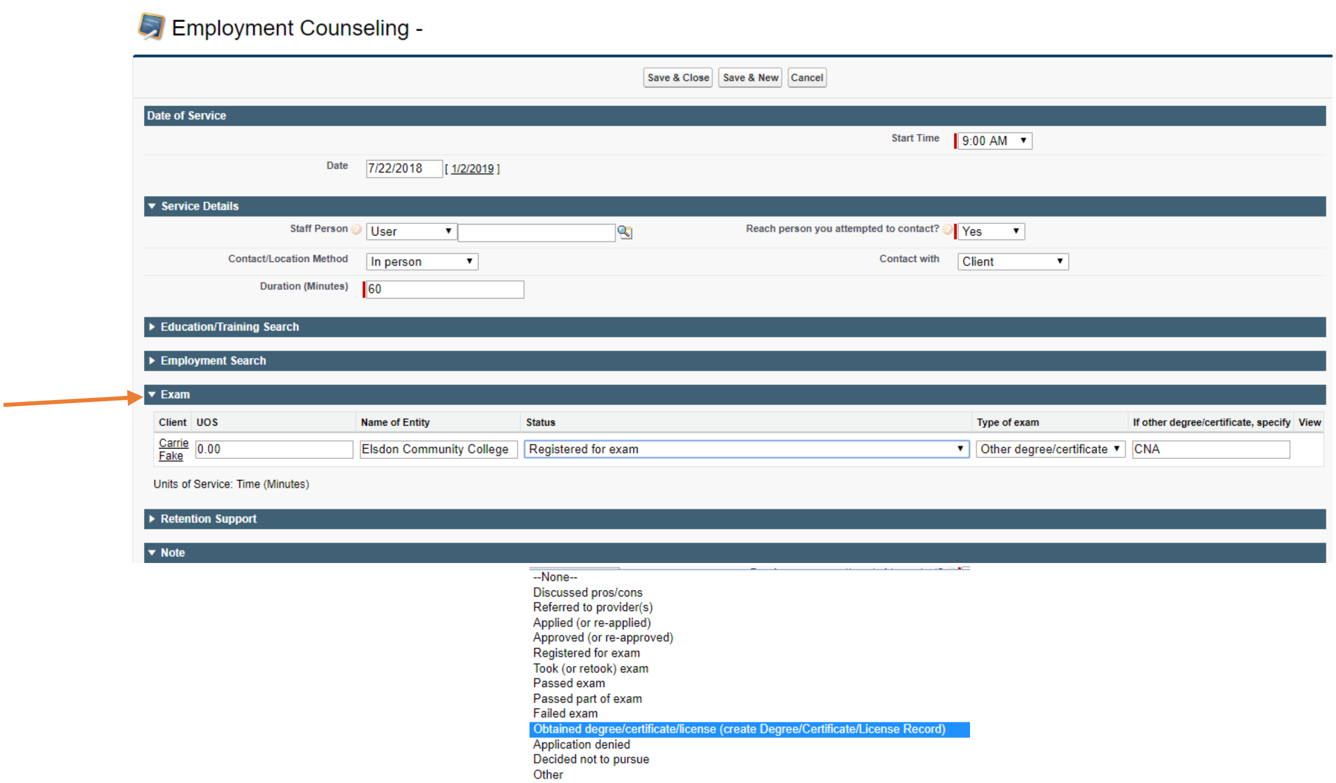
3. In the Exit section of the record fill in : "End date", "Exit Status", "Reason for early exit" (if applicable) ; Save

Tracking Services Received and Testing Progress

As FOCs, all sites must continue to record all services rendered to clients through "Service Entries" for Financial Counseling, Income Supports, & Employment Services as you normally would. Specifically for this DOL- REO grant we are also tracking testing progress as Skills Progression, which is one of the indicators in the DOL's Measureable Skills Gain outcome.

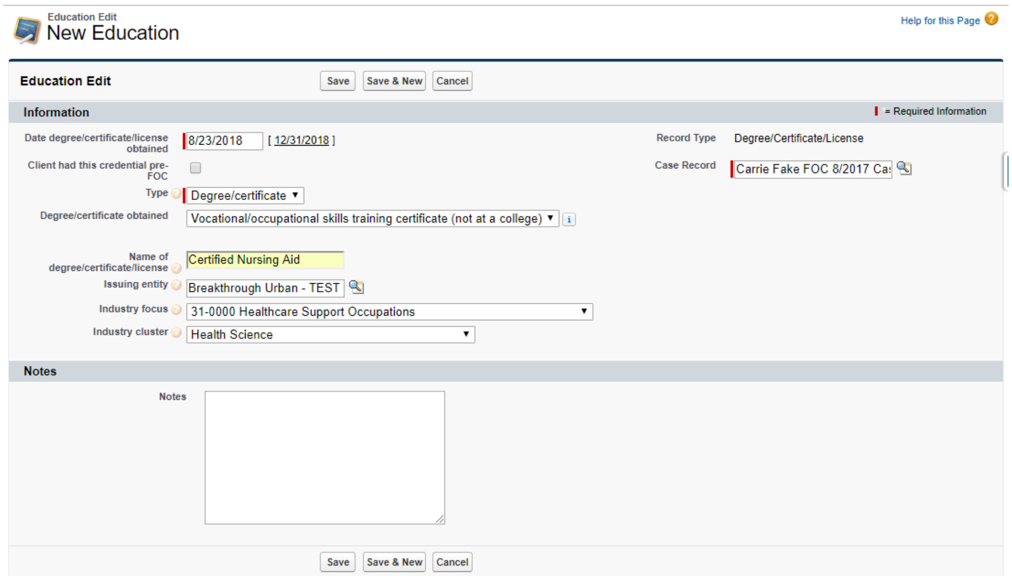
Tracking Testing:

1) From your clients' case record hover over the "Service Entries" tab and click on "New Service Entry"
2) Select "Employment Counseling" Service Entry; then "next"
3) Fill in required data at the top and then scroll to the story "Exam" and open it by clicking on the arrow.
4) Enter "Name of Entity", "Status" and "Type of Exam"; for Example see below; "Save"



Record Credentials:

Although LISC tracks and reports on all industry-recognized, sector-driven credentials, DOL approves credentials individually.

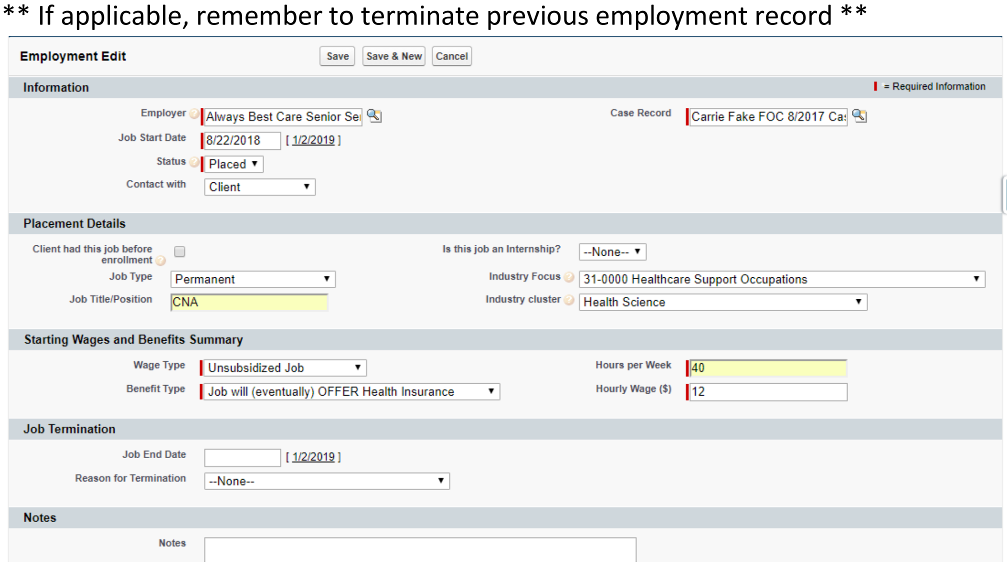


1) From your client's case record, hover over the "Education" tab
2) Click on "Degree/ Certificate/ License"

Recording New Placement:

1) From your client's case record, hover over the "Employment" tab.
2) Click on "New Employment"
3) Fill in all fields with employment information.
4) Refer to page __ for guidance on Industry Cluster vs. Industry Focus

** If applicable, remember to terminate previous employment record **



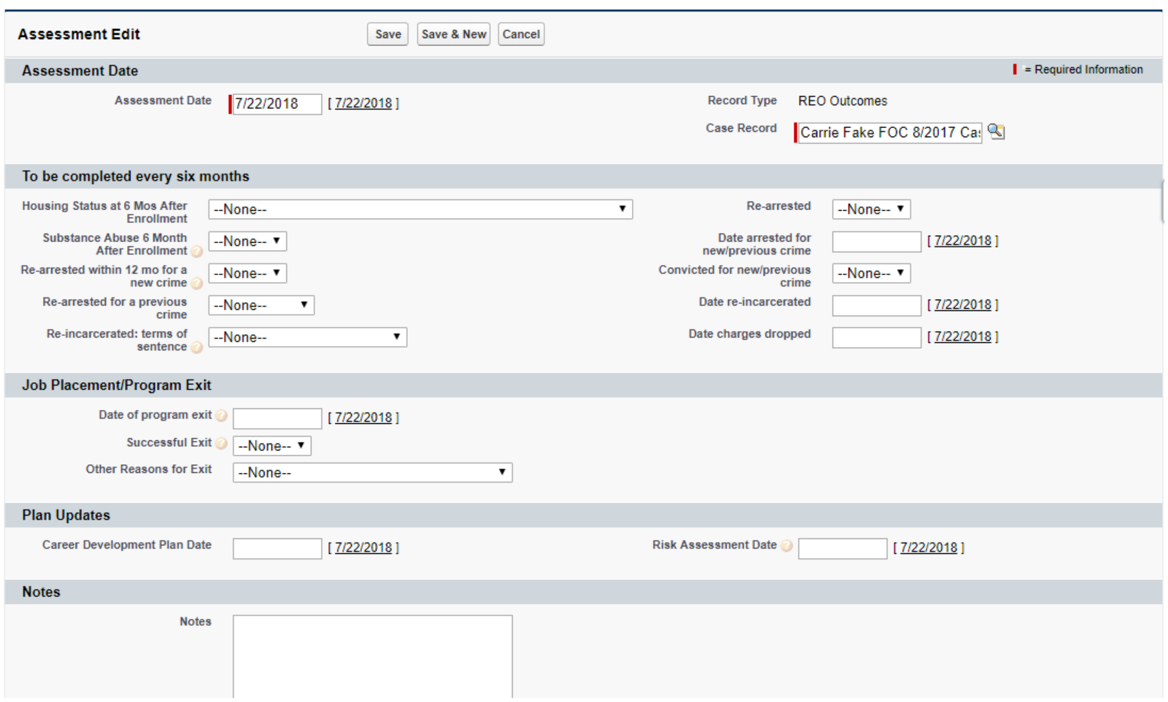
Exiting a Client and Follow up:

LISC does not have any set policy or standard for exiting a client for this specific grant. Please refer to your own internal policies. The follow up period for each client begins at program “exit”. Clients will remain active in the FOC even if they are “exited” from the REO program.

The “exit” only means the participant has transitioned from the program-training phase into follow up services, where they receive supportive services such as coaching and referrals, job retention support, and core FOC services. Exiting a participant is required by DOL in order to begin tracking a participant’s job retention; you will not be able to count job retention for DOL unless a participant is successfully exited.

When you are ready to exit a client:

1) From your client’s case record , hover over the “Assessment” tab
2) Click on “REO Outcomes” and complete the assessment, including the program exit date.
   ** Note you can also wait to enter the program exit date and later edit this assessment;



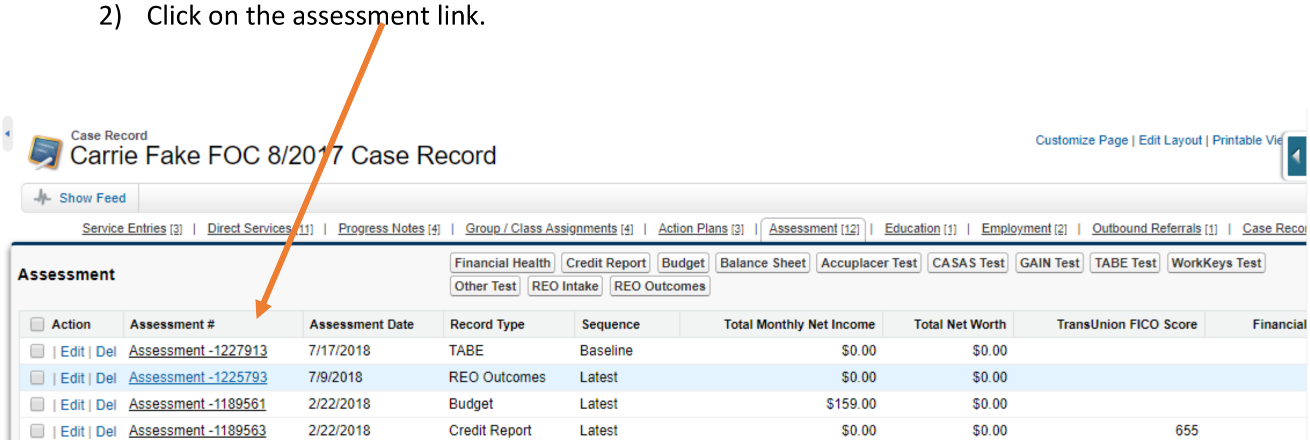
Tracking Client Job Retention:

Once a client has been exited from the program, WIOA retention tracking can begin. For WIOA, retention tracking begins the quarter after exit, and continues quarterly for four quarters post-exit. You must record if a client has worked any day in each quarter following exit. This can include both those who have retained initial job placement and those who have changed jobs. This also counts if there was any gap in employment as long as the client worked at least one day in the quarter. Refer to the Retention Timeline table to track your retention outreach requirements.

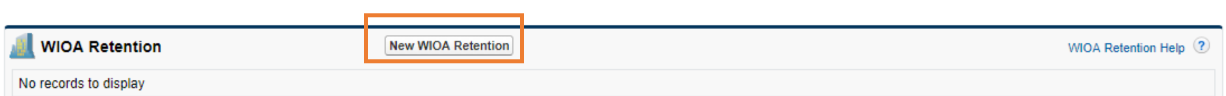
(Example): If Joe gains employment on Feb. 12 and you exit him on Feburary 27th, his 1st quarter retention will be between March – June, 2nd quarter retention will be July – September, etc. In addition to the DOL-specific WIOA retention you still must track job retention as usual, through the “Advancement Records” as well.

WIOA Retention:

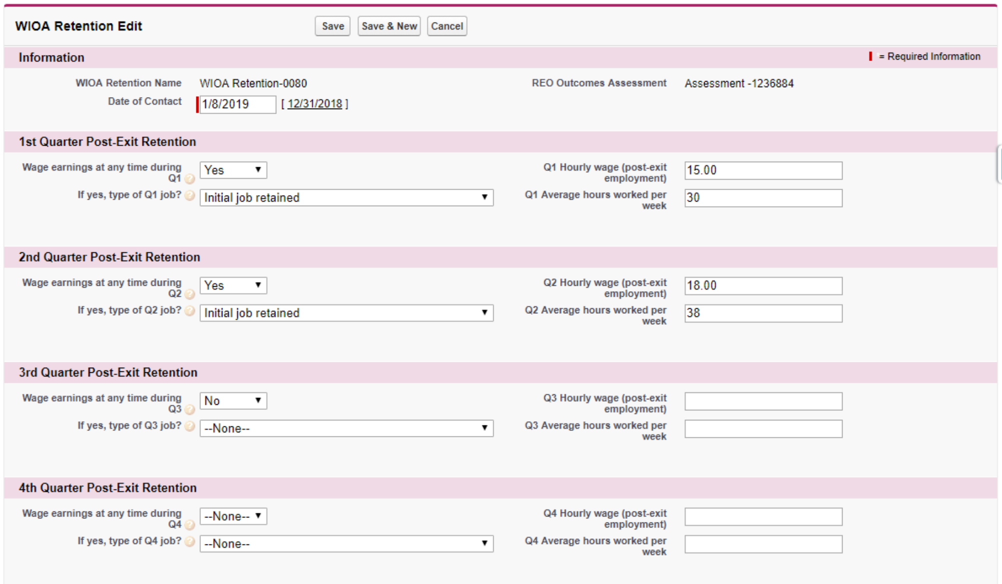
1) From your client’s case record, hover over the “assessment” tab and locate the “REO Outcomes”
2) Click on the assessment link.



3) Scroll down to the bottom of the assessment to find “WIOA Retention” section
4) Click on “New WIOA Retention”



5) Start with 1st Quarter Retention information and leave others blank; Save
6) When recording the next quarters retenion; click on the link for the latest WIOA retention record and then “clone”
7) Remember to change the “date of contact” and update the next quarter’s retention information.
8) Add information for the next quarter; Repeat #6 for quarters 3 and 4.



WIOA Retention Edit
Save | Save & New | Cancel

Information
= Required Information

WIOA Retention Name: WIOA Retention-0080
REO Outcomes Assessment: Assessment -1236884
Date of Contact: 1/8/2019 [12/31/2018]

1st Quarter Post-Exit Retention

Wage earnings at any time during Q1: Yes
Q1 Hourly wage (post-exit employment): 15.00
If yes, type of Q1 job?: Initial job retained
Q1 Average hours worked per week: 30

2nd Quarter Post-Exit Retention

Wage earnings at any time during Q2: Yes
Q2 Hourly wage (post-exit employment): 18.00
If yes, type of Q2 job?: Initial job retained
Q2 Average hours worked per week: 38

3rd Quarter Post-Exit Retention

Wage earnings at any time during Q3: No
Q3 Hourly wage (post-exit employment):
If yes, type of Q3 job?: --None--
Q3 Average hours worked per week:

4th Quarter Post-Exit Retention

Wage earnings at any time during Q4: --None--
Q4 Hourly wage (post-exit employment):
If yes, type of Q4 job?: --None--
Q4 Average hours worked per week:

Reporting

DOL-ETA Reentry Project	
Outcome Indicator with Links to Report	**Definitions**
Program-Related Outcomes (enrollment through program exit)	
Total RP-eligible persons enrolled	Number of individuals who meet all eligibility requirements, and are enrolled and certified in Salesforce REO Intake assessment.
Total enrollees with increased skills gains to begin occupational training (Combination of 3 reports- Report 1 + Report 2 + Report 3)	Number of enrolled participants who show increased educational skills gains via completion of ABE/Bridge education, gains in Educational Functional Level or digital literacy, or passage of an educational exam such as GED or another industry-related exam. Make sure the aggregate total is unduplicated so participants are not counted twice.
Total enrollees who complete occupational skill training	Number of enrolled participants who complete occupational skills training/advanced industry-focused training. Ensure you count only those completing the vocational/occupational training in the report from Salesforce.

Total enrollees attaining industry-recognized credentials	Number of enrolled participants who obtain industry-recognized credentials. Include all formal credentials, including those DOL has AND has not approved, so we can report to DOL on both outcomes. Do *not* included work readiness credentials or certificates of completion.
Total enrollees placed into employment	Number of participants placed into paid, unsubsidized, permanent employment. Does not include transitional jobs or subsidized OJT.
Total successful program exits*	Number of participants positively or "successfully" exited (answering "Yes") from Salesforce REO Outcomes assessment after meeting an employment, education, or career development milestone and meeting the site's internal policies/procedures for exit. This transitions the participant into their "follow up services" phase and sites track job retention quarterly.
Job Retention Outcomes (to occur during the year following job placement)	
Total number of those placed in jobs who retained employment 2nd quarter after exit	The % of participants who earn ANY wages from employment during the **2nd quarter after program-exit** in Salesforce. Includes both those who have retained initial job placement and those who have changed jobs. Program exit occurs according to FOCs discretion and in accordance to their written exit policy. When viewing the report, ensure you review the 2nd quarter post-exit column. Divide this number by your number of successful exits to get the percentage.
Total number of those placed in jobs who retained employment 4th quarter after exit	The % of participants who earn ANY wages from employment during the **4th quarter after program-exit** from Salesforce. Includes both those who have retained initial job placement and those who have changed jobs. Program exit occurs according to FOCs discretion and in accordance to their written exit policy. Divide this number by your number of successful exits to get the percentage.
Financial Stability Outcomes (Monitored every 6 months beginning at intake)	
Total enrollees with increased net income	% of those enrolled participants who show any increase in net income (from earned income + income supports) at any point between intake and end of June 2020. Track in Salesforce as usual. You can filter the FFT Performance Report to show only DOL Reentry Participants, and then find line F31 "People with Monthly Net Income (NI) going up." Divide this number by your number of enrollments to get the percentage.

Total enrollees with increased net worth	% of those enrolled participants who show any increase in net worth (balance sheet increase) at any point between intake and end of June 2020. You can filter the FFT Performance Report to show only DOL Reentry Participants, and then find line F33 "People with Net Worth (NW) going up." Divide this number by your number of enrollments to get the percentage.
Total enrollees with improved credit scores	% of those enrolled participants who show any gain in credit score from any at any point between intake and end of June 2020 as found on a pulled credit report from at least one credit bureau. You can filter the FFT Performance Report to show only DOL Reentry Participants, and then find line F22 "People with at least one bureau showing an improved FICO credit score." Divide this number by your number of enrollments to get the percentage.
Recidivism Outcomes	
Total enrollees re-arrested or re-incarcerated within 12 months (Report 1 + Report 2)	DOL requires that fewer than 20% of individuals enrolled are re-arrested or re-incarcerated within 12 months. This is the aggregate number of those who are re-arrested for a new crime within 12 months of release plus those who are re-incarcerated for a revocation of the parole or probation order for violations of terms of sentence. Calculate % by dividing the aggregate number by the total number of enrollments.