

FFT Salesforce Training Exercise/Guide

Summary:

This is a simulation of how you will use FFT Salesforce to track client outcomes. This exercise is designed to develop your knowledge of the new system. You will enter a fake client and document the situations described in the directions below to the best of your ability.

If you are unsure of how to do something in this exercise, please make a note and submit your feedback to fftfocusupport@lisc.org or bring your questions to office hours.

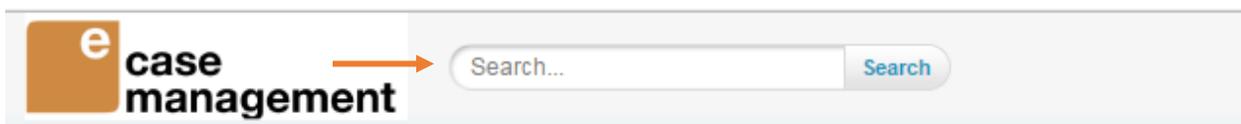
Salesforce Login information:

Website: <https://partial-lisc.cs29.force.com/partners/login>

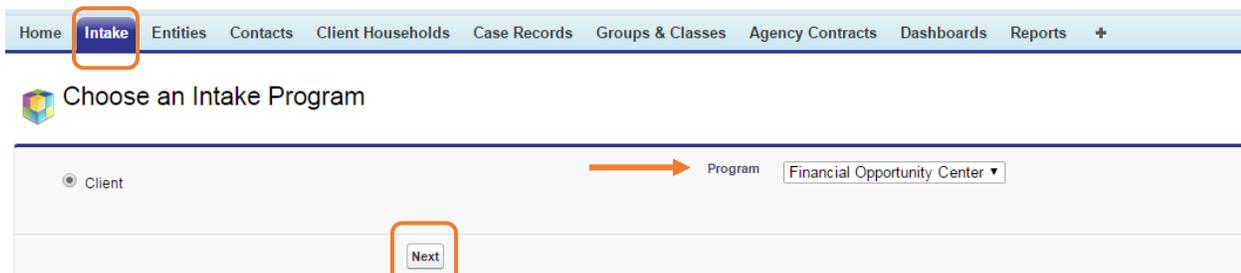
Email the support desk at fftfocusupport@lisc.org to receive the login credentials.

INTAKE:

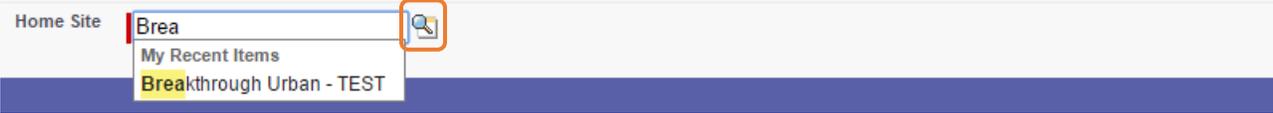
1. Begin by searching for your fake client in the database to avoid creating duplicates.



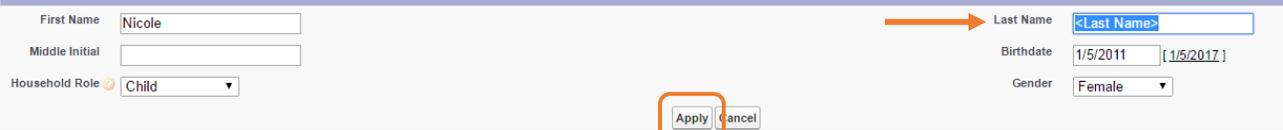
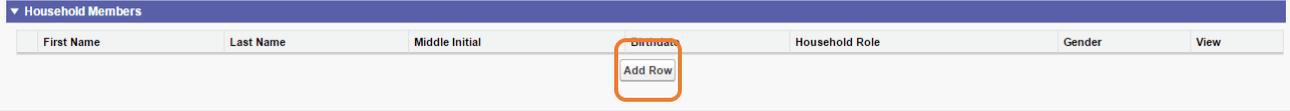
2. Once you have verified your fake client is not in the database, proceed to add your client by clicking on the "Intake" tab (make sure to select *Financial Opportunity Center* as the *Program* for enrollment). Click on NEXT.



3. You will be directed to the Intake form. Choose a first name for your client and use "Fake" as the last name.
 - (1) Complete your client's demographics fields and select the options to indicate your client is currently **in school** and **working**.
 - (2) Enter 1/3/2015 as your enrolled date and type the name of your agency as the *Home Site*. (If the system does not automatically generate the name, then click on the magnifying glass next to the field and select your site on the next screen).

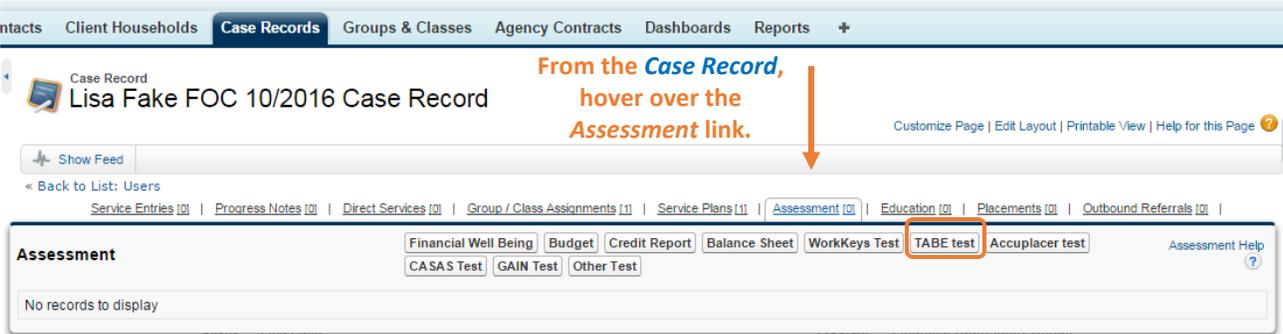


(3) Lastly, add two household members for your client by clicking on the ADD ROW button and entering the applicable information. *Note:* Don't forget to update your client's household member last names. Click on the APPLY button to add your household member.



(4) Once completed, click on the SAVE button to add your new client.

4. A **Case Record** is automatically generated for your client, and this will be the place to enter all your client's services. (Your client's household is also automatically generated). From this page, you will enter your client's current employment and education information.
 - a. Click on the EDIT button and fill in the *Case Record* with applicable information for your client (i.e. Orientation date, FOC Assigned Staff, etc). Then click on the SAVE button.
 - b. As part of the intake process, your client was administered the **TABE**, and you need to document his/her scores. From the Case Record, hover over the Assessment link, and click on the TABE Test button. Enter 1/1/15 as the test date, Stage as Intake/Pre-Test, reading level (D) with grade equivalency of 10.6, and math level (D) with grade equivalency of 8.8. Click on the SAVE button. *Note:* You may select a different test as applicable to your agency.



5. Employment Record: Click on your client's **Case Record** in the blue Recent Items box on the left off your screen. (If you do not see your client's case record, you can always search for your client again and click on his/her case record.)

The screenshot shows the eCase Management interface. On the left sidebar, the 'Recent Items' section is highlighted with an orange box and an arrow. The list includes: Carrie Fake FOC 11/2016 Case Record, Job Readiness Class Jan 2017, Digital Literacy Class 2017, Andy Fake TaxPm 1/2017 Case Record, Financial Literacy Basics Workshop, Axel Fake FOC 12/2016 Case Record, JR Cohort A, CNA Cohort 1, Paul Fake FOC 1/2017 Case Record, and Paul Fake. The main dashboard area shows a 'Dashboard' with two gauges: 'Total Hours This Year' (0 to 1,000) and 'Total Volunteers This Year' (0 to 200). Below these are 'My Tasks' and a 'Search' bar.

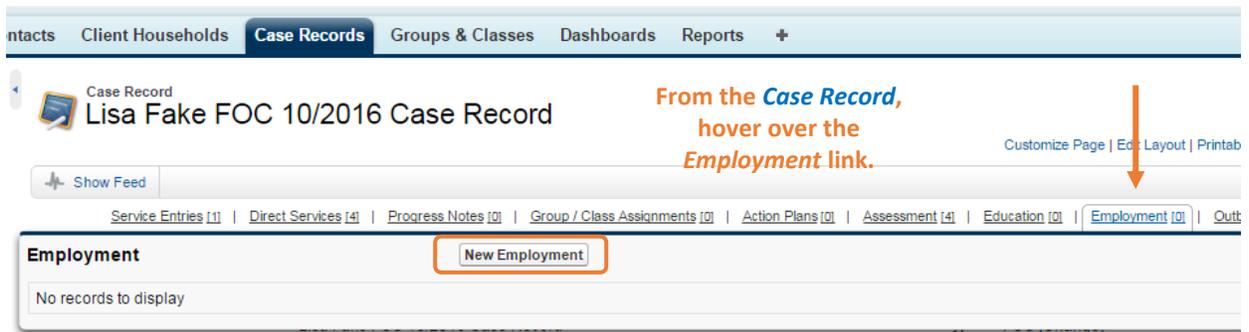
The screenshot shows the search results for 'lisa fake'. The search bar contains 'lisa fake' and the results are filtered to 'Case Records (1)'. The table below shows the search results:

| Action | Case Name | Client Name | Client | Client Household | Program | Status | Created Date | Created By | Owner Alias |
|----------------------|---|-------------|---------------------------|--------------------------------|--|--------|--------------|---|-----------------------|
| Edit | Lisa Fake FOC 10/2016 Case Record | Lisa Fake | Lisa Fake | Fake Household | Financial Opportunity Center | Active | 10/28/2016 | Carolina Rendon, 10/28/2016 9:27 AM | CRend |

Below the table, there is a section for 'Contacts (1)'.

Hover over the Employment link and click on the Employment Record button. Create a new record and indicate the following for your client: has been working 20 hours/week at Best Circuit at \$10.00/hour since 10/16/14 as a cashier with no health insurance. Make sure to select *Client had this job before enrollment* for this record. Click on the SAVE button.

- i. Note: All companies/entities need to be created in the system prior to creating an Employment Record. We will practice adding a new *Entity* later in this exercise.



6. Education/Training Program Record: Click on your client’s **Case Record** in the blue Recent Items box on the left off your screen. (If you do not see your client’s case record, you can always search for your client again and click on his/her case record.)

Hover over the Education link and click on the Education/Training Program button. Create a new record and indicate the following for your client: started at United Community College pursuing an Associate Degree on 8/26/14. Enter the applicable information and click on the SAVE button.

- i. Note: All education institutions/entities need to be created in the system prior to creating an Education/Training Program record. We will practice adding a new *Entity* later in this exercise.



FINANCIAL COUNSELING SERVICES:

1. Document the activities below:
 - a. 1/3/15: Click on your client’s **Case Record**. Hover over the *Assessment* link and click on each of the financial assessment buttons (which take the place of the Combined Financial Assessment (CFA). Complete each financial assessment for your client using made-up information. Be sure to complete all sections and click on the SAVE button when you complete each assessment.
 - i. Financial Health: Fill in all of the information on this assessment. You will not be able to fill in the *Financial well-being score* when first completing the assessment. After you click on the SAVE button, use the *Financial Well-Being Response Value* to calculate the *Financial well-being score* on the *Financial Well-Being Scale Scoring Worksheet*. Click on the EDIT button, fill in the *Financial well-being score*, and click on the SAVE button again.

Assessment Detail Edit Delete Clone

▼ **Assessment Date: REMEMBER TO UPDATE DATE IF SUBSEQUENT**

Assessment Date 1/2/2017 Record Type Financial Health [Change]
 Case Record [Carrie Fake FOC 11/2016 Case Record](#)

▼ **CFPB Financial Well-Being (FWB) Scale**

How did you take the questionnaire? I read the questions. Financial Well-Being Response Value 31
 Client Age 36

▼ **(FWB) PART 1: How well does this statement describe you or your situation?**

I could handle major unexpected expense 3 Very well Part 1 Total 18
 I am securing my financial future 3 Very well
 Because of \$ I'll never have what I want 3 Very little
 I can enjoy life because how I manage \$ 2 Somewhat
 I am just getting by financially 4 Not at all
 I'm concerned \$ I have/save won't last 3 Very little

▼ **(FWB) PART 2: How often does this statement apply to you?**

Giving gift would strain month finances 4 Never Part 2 Total 13
 I have money left over at end of month 3 Often
 I am behind with my finances 4 Never
 My finances control my life 2 Sometimes

▼ **Financial Well-Being Score**

Financial well-being score

▼ **University of Wisconsin MCFS Financial Capability Scale**

Do you have a budget or financial plan? 0 No Financial Capability Score 3
 Confidence: ability to achieve fin. goal 1 Somewhat confident
 Conf: ability make ends meet: emergency 1 Somewhat confident
 Do you have automatic savings? 0 No
 Was family's expense less than income? 0 No
 Last 2 mos, have been charged late fee? 1 No

▼ **Banking Information**

Do you have a checking account? Yes Do you bounce checks frequently? No
 Do you have a savings account? No Have you ever had a checking account?
 What is the main reason?

▼ **Custom Links**

FWB Scale Scoring Worksheet [Financial Well-Being Scale Scoring Worksheet](#) [Financial Capability Scale](#) [Financial Capability Scale](#)
 Financial Well-Being Scale User Guide [Financial Well-Being Scale User Guide](#)

▼ **Notes**

Notes

▼ **System Information**

Assessment # Assessment-0204 Created By Carolina Rendon 1/2/2017 8:01 PM
Last Modified By Carolina Rendon 1/17/2017 1:29 PM

Edit Delete Clone

- ii. Credit Report: Your client has a FICO credit score of 500.
- iii. Budget: Your client's rent is unsubsidized, so make sure to include a rent amount on the budget.
- iv. Balance Sheet: Your client owes an overdue utility bill of \$500, so make sure to include that on the balance sheet.

Contacts Client Households **Case Records** Groups & Classes Agency Contracts Dashboards Reports +

Case Record Lisa Fake FOC 10/2016 Case Record From the Case Record, hover over the Assessment link.

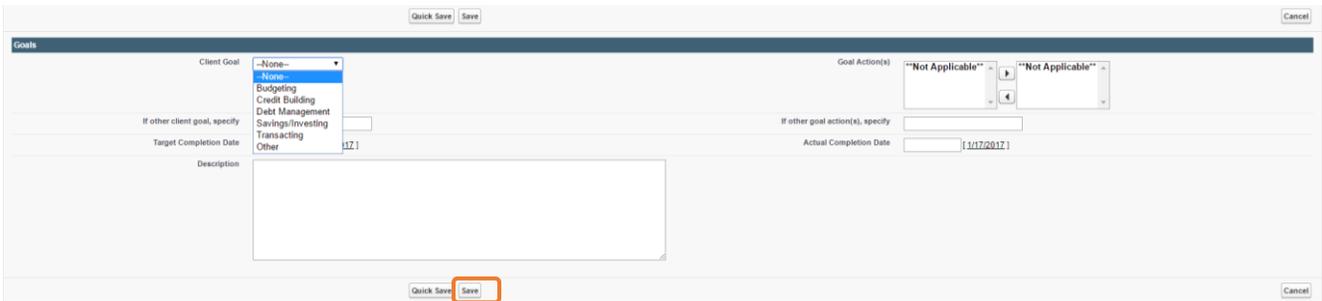
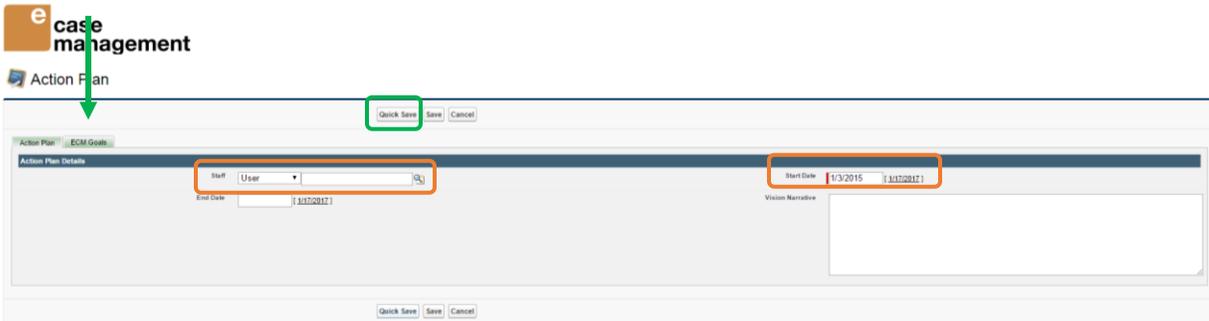
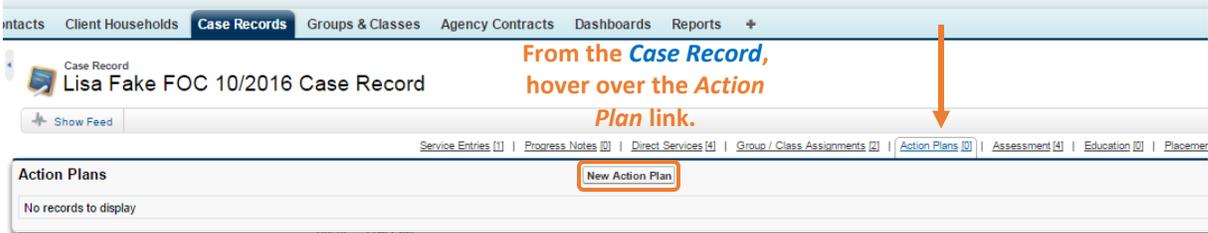
Show Feed Customize Page | Edit Layout | Printable View | Help for this Page

Service Entries [3] | Direct Services [4] | Progress Notes [3] | Group / Class Assignments [0] | Action Plans [0] | **Assessment [0]** | Education [1] | Employment [0] | Outbound Referrals [0] |

Assessment Financial Health Credit Report Budget Balance Sheet Accuplacer Test CASAS Test GAIN Test TABE Test Assessment Help
WorkKeys Test Other Test

No records to display

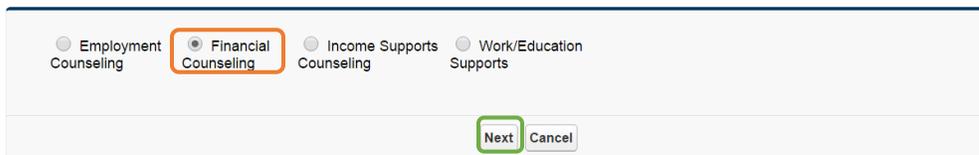
- b. 1/3/15: Create an Action Plan (Vision) for your client. Click on your client's **Case Record**. Hover over the Action Plans link and click on the New Action Plan button. Ignore the *Staff* field (this is to be used by someone entering data on someone else's behalf). Enter 1/3/15 as the *Start Date*, and write in a *Vision Narrative* (this used to be the Big Vision). Click on the QUICK SAVE button. Click on the ECM Goals tab. Click on the New ECM Goal button. Choose a *Client Goal* and at least one *Goal Action*. Fill in the *Target Completion Date*. Click on the SAVE button. Click on the New ECM Goal button again and choose a second *Client Goal*, etc. Click on the SAVE button. You may create as many ECM Goals as you wish.



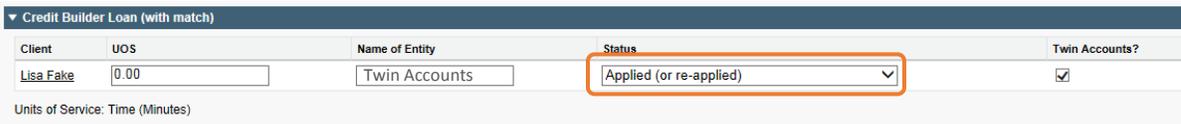
c. 1/10/15: Click on your client’s **Case Record**. Hover over the Service Entries link and click on the New Service Entry button. Click on Financial Counseling and click on the NEXT button. Your client comes into the office to discuss his/her family’s housing situation. S/he hopes to move his/her family into a new apartment but has had trouble doing so due to poor credit. You recommend a credit builder loan with match. You can ignore the *Staff Person* field, as this is to be used by people entering data on someone else’s behalf. Use the arrow next to the Story you want to use (Credit Builder Loan with match) to expand the Story to see all the fields. You may ignore the *UOS* field (unless you want to track how many minutes you spent on each story). Fill in the *Name of Entity* and *Status* fields, and check off *Twin Accounts* if you are recommending a Twin Accounts loan. The Stories are on two pages in Financial Counseling, so you will need to click on the NEXT button at the bottom of the page. To record a note, click on the ADD ROW button at the bottom of the screen. Type your note, and click on the APPLY button. You may use the SAVE & NEW button when adding multiple Service Entries in a row, and you may click on the SAVE button when you are done entering Service Entries.



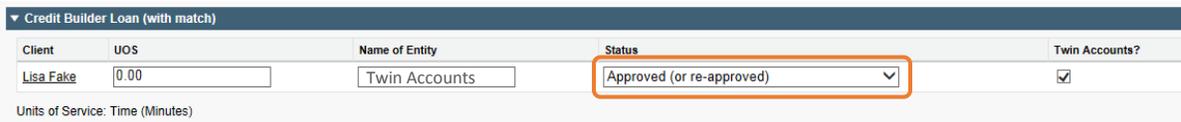
Select an ECM Service Entry Form



2. 1/17/15: Your client calls you to tell you s/he applied for the credit builder loan with match. (Click on arrow to expand section).



3. 1/25/15: Your client returns to the office and tells you s/he was approved for the credit builder loan with match.



4. 7/13/15: You pull your client’s credit to check for improvements. You find that your client’s FICO score has improved to 550. Click on your fake client’s Case Record. Hover over the Assessment link and click on the assessment # you need to update. On the next screen, click on the CLONE button to copy the assessment. Enter the correct date, update the necessary information, including the FICO score, and click on the SAVE button.

From the Case Record, hover over the Assessment link.

| Action | Assessment # | Assessment Date | Record Type | Sequence |
|--------------|-----------------|-----------------|---------------|----------|
| [Edit] [Del] | Assessment-0107 | 1/17/2015 | Budget | Latest |
| [Edit] [Del] | Assessment-0104 | 1/3/2015 | Budget | Baseline |
| [Edit] [Del] | Assessment-0105 | 1/3/2015 | Credit Report | Baseline |
| [Edit] [Del] | Assessment-0106 | 1/3/2015 | Balance Sheet | Baseline |

Click on the Clone button to copy the assessment.

Assessment Detail

Assessment Date: 1/3/2015

Record Type: Credit Report [Change]

Case Record: Lisa Fake FOC 10/2016 Case Record

EMPLOYMENT COUNSELING SERVICES:

Document the activities below:

- a. 1/3/15: You meet with your client to assess his/her strengths and needs. You help him/her start his/her search for a better job. Record a new Service Entry for Employment Counseling. You can ignore the *Staff Person* field, as this is to be used by people entering data on someone else’s behalf. Use the arrow next to the Story you want to use to expand the Story to see all the fields. You may ignore the *UOS* field (unless you want to track how many minutes you spent on each story).

From the Case Record, hover over the Service Entries link.

Service Entries

No records to display

Select an ECM Service Entry Form

Employment Counseling Financial Counseling Income Supports Counseling Work/Education Supports

Date of Service

Date: [1/10/2017] Start Time: ▾

Service Details

Staff Person: Reach person you attempted to contact?: ▾

Contact/Location Method: ▾ Contact with: ▾

Duration (Minutes):

Education/Training Search

Employment Search



[\(New\)](#)

Client: Lisa Fake

UOS:

Name of Entity:

Status: ▾

Created job search materials:

Completed mock interview(s):

Completed Individualized Employment Plan:

Number of job leads received:

Number of applications/resumes submitted:

Number of interviews scheduled:

Participant has experience in

| Available | Chosen |
|--|--------|
| 11-0000 Management Occupations | |
| 13-0000 Business and Financial Operations Occupations | |
| 15-0000 Computer and Mathematical Occupations | |
| 17-0000 Architecture and Engineering Occupations | |
| 19-0000 Life, Physical, and Social Science Occupations | |
| 21-0000 Community and Social Service Occupations | |
| 23-0000 Legal Occupations | |

Participant is interested in working in

| Available | Chosen |
|--|--------|
| 11-0000 Management Occupations | |
| 13-0000 Business and Financial Operations Occupations | |
| 15-0000 Computer and Mathematical Occupations | |
| 17-0000 Architecture and Engineering Occupations | |
| 19-0000 Life, Physical, and Social Science Occupations | |
| 21-0000 Community and Social Service Occupations | |
| 23-0000 Legal Occupations | |

Note: Click on (New) to expand the section.

b. 1/10/15: You meet with your client to finalize his/her resume.

Save Save & New Cancel

Date of Service

Start Time 9:00 AM

Date 1/10/2015 [1/10/2017]

Service Details

Staff Person User

Reach person you attempted to contact? Yes

Contact/Location Method In person

Contact with Client

Duration (Minutes) 30

Education/Training Search

Employment Search

(New)

Client Lisa Fake

UOS 30

Name of Entity

Status Initiated/continued search

Created job search materials

Completed mock interview(s)

Completed Individualized Employment Plan

Number of job leads received

c. 1/14/15: You meet with your client to conduct a mock interview and to give him/her two new job leads.

Save Save & New Cancel

Date of Service

Start Time 9:00 AM

Date 1/14/2015 [1/10/2017]

Service Details

Staff Person User

Reach person you attempted to contact? Yes

Contact/Location Method In person

Contact with Client

Duration (Minutes) 30

Education/Training Search

Employment Search

(New)

Client Lisa Fake

UOS 30

Name of Entity

Status Initiated/continued search

Created job search materials

Completed mock interview(s)

Completed Individualized Employment Plan

Number of job leads received 2

Number of applications/resumes submitted

d. 1/19/15: Your client calls you to tell you s/he has scheduled an interview for a new job on 1/26/15.

Save Save & New Cancel

Date of Service

Start Time 9:00 AM

Date 1/19/2015 [1/10/2017]

Service Details

Staff Person User [] Reach person you attempted to contact? Yes

Contact/Location Method In person Contact with Client

Duration (Minutes) 30

Education/Training Search

Employment Search

(New)

Client Lisa Fake

UOS 30

Name of Entity []

Status Initiated/continued search

Created job search materials

Completed mock interview(s)

Completed Individualized Employment Plan

Number of job leads received []

Number of applications/resumes submitted []

Number of interviews scheduled 2

e. 2/10/15: Your client calls to say that s/he got the new job and quit his/her previous job on 2/3/15.

- i. Terminate the current job. (Hover over the *Placements* link and edit the current job). Fill in the **Job Termination** section and click on the SAVE button.

Contacts Client Households **Case Records** Groups & Classes Dashboards Reports +

Case Record Lisa Fake FOC 10/2016 Case Record

From the *Case Record*, hover over the *Employment* link.

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Service Entries [1] | Direct Services [4] | Progress Notes [0] | Group / Class Assignments [0] | Action Plans [0] | Assessment [4] | Education [0] | **Employment [1]** | Outbound Referrals [0]

Employment New Employment Employment Help

| Action | Employment Name | Job Start Date | Job End Date | Job Title/Position | Hourly Wage (\$) | Hours per Week | Benefit Type | Wage Type | Days since job start date |
|------------|-----------------|----------------|--------------|--------------------|------------------|----------------|--|------------------|---------------------------|
| Edit Del | P-0083 | 10/16/2014 | | | \$10.00 | 20 | Job will (eventually) OFFER Health Insurance | Unsubsidized Job | 830 |

Job Termination

Job End Date [1/10/2017]

Reason for Termination

Notes

Notes

- ii. Add [Your name] Fake Hotel as a new *Entity*. Click on the Entities tab and click on the NEW button. On the next page, select Entity as the type, and click on the CONTINUE button. Select Employer as the Entity type, and ignore the Educational Institution Type field. Fill in the appropriate information and click on the SAVE button.

Home Intake **Entities** Contacts Client Households Case Records Groups & Classes Agency Contracts Dashboards Reports +

LISC Entities Home Tell me more! | Help for this Page ?

View: [Edit](#) | [Create New View](#)

Recent Entities

| Entity Name | Entity Record Type | Type | Primary Contact | Billing City | Phone | Total Gifts |
|-----------------------------------|--------------------|----------------|-----------------|--------------|-------|-------------|
| Genesis Institute | Partner Agency | Partner Agency | | | | \$0.00 |
| Best Circuit | Entity | | | | | \$0.00 |

New Entity Help for this Page ?

Select Entity Record Type

Select a record type for the new entity. To skip this page in the future, change your record type settings on your personal setup page.

Select Entity Record Type

Record Type of new record

Placement Edit Save Save & New Cancel

Information = Required Information

Employer: Regal Hotel Fake
 Job Start Date: 2/5/2015 [1/10/2017]
 Status: Placed
 Contact with: Client

Record Type: Employment Record
 Case Record: Lisa Fake FOC 10/2016
 Retention Clock: P-0063

Placement Details

Client had this job before enrollment:
 Job Type: Permanent
 Job Title/Position: Concierge

Is this job an Internship?: No
 Industry Focus: --None--
 Industry cluster: --None--

Starting Wages and Benefits Summary

Wage Type: Unsubsidized Job
 Benefit Type: Job will (eventually) OFFER Health Insurance
 Hours per Week: 25
 Hourly Wage (\$): 14

Job Termination

Job End Date: [1/10/2017]
 Reason for Termination: --None--

Notes

Notes

Save Save & New Cancel

- iii. Update the budget with this new information. Hover over the Assessments link, and click on the Assessment # next to the Budget. On the next screen, click on the CLONE button to copy the assessment. Enter the correct date, update the necessary information, including the updated wages, and click on the SAVE button.

Contacts Client Households **Case Records** Groups & Classes Dashboards Reports +

Case Record Lisa Fake FOC 10/2016 Case Record *From the Case Record, hover over the Assessments link.*

Service Entries (1) | Direct Services (4) | Progress Notes (0) | Group / Class Assignments (0) | Action Plans (0) | **Assessment (4)** | Education (0) | Employment (1) | Outbound Referrals (0)

Financial Health Credit Report Budget Balance Sheet Accuplacer Test CASAS Test GAIN Test TABE Test Assessment Help
 WorkKeys Test Other Test

| Action | Assessment # | Assessment Date | Record Type | Sequence |
|------------|-----------------|-----------------|---------------|----------|
| Edit Del | Assessment-0107 | 1/17/2015 | Budget | Latest |
| Edit Del | Assessment-0104 | 1/3/2015 | Budget | Baseline |
| Edit Del | Assessment-0105 | 1/3/2015 | Credit Report | Baseline |
| Edit Del | Assessment-0106 | 1/3/2015 | Balance Sheet | Baseline |

acts Client Households **Case Records** Groups & Classes Dashboards Reports +

Assessment
Assessment -0107

Customize Page | Edit Layout | Printable View | Help for this Page

Assessment Detail Edit Delete **Clone**

▼ Assessment Date: REMEMBER TO UPDATE DATE IF SUBSEQUENT

Assessment Date 1/17/2015 Record Type Budget [Change]

Case Record Lisa Fake FOC 10/2016 Case Record

Budget reflects own finances/whole HH First Budget created?

acts Client Households **Case Records** Groups & Classes Dashboards Reports +

Assessment Edit
New Assessment

Help for this Page

Assessment Edit Save Save & New Cancel

Assessment Date: REMEMBER TO UPDATE DATE IF SUBSEQUENT = Required Information

Assessment Date 1/17/2015 [1/23/2017]

Record Type Budget

Case Record Lisa Fake FOC 10/2016 Case Record

Information

Budget reflects own finances/whole HH First Budget created? --None--

Partial/complete update of Budget --None--

i. Note: Make sure to update the date and click on the SAVE button once the update is complete.

f. 3/8/15: You call your client to see how the first month of work has gone. The client says all is going well. Record a retention update for your client by adding an *Advancement* to the Employment record.

acts Client Households **Case Records** Groups & Classes Dashboards Reports +

Case Record
Lisa Fake FOC 10/2016 Case Record

From the *Case Record*,
hover over the
Employment link.

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Service Entries (1) | Direct Services (4) | Progress Notes (0) | Group / Class Assignments (0) | Action Plans (0) | Assessment (4) | Education (0) | **Employment (1)** | Outbound Referrals (0)

Employment New Employment Employment Help

| Action | Employment Name | Job Start Date | Job End Date | Job Title/Position | Hourly Wage (\$) | Hours per Week | Benefit Type | Wage Type | Days since job start date |
|---------------|-----------------|----------------|--------------|--------------------|------------------|----------------|--|------------------|---------------------------|
| Edit Delete | P-0083 | 10/16/2014 | 2/10/2015 | Cashier | \$10.00 | 20 | Job will (eventually) OFFER Health Insurance | Unsubsidized Job | 830 |

Employment
P-0077

From the *Employment Record*,
hover over the *Advancements* link.

Customize Page | Edit Layout | Printable View | Help for this Page

Advancements (0)

Advancements New Advancement Advancements Help

No records to display

Advancement Edit Help for this Page

New Advancement

Advancement Edit Save Save & New Cancel

Information = Required Information

Date: 3/8/2015 [1/23/2017] Job Placement: P-0083

Contact with: Client

Status: Tried unsuccessfully to verify retention, Suspended, On leave of absence, Returned to work. **Chosen**: Verified retention

Employment Update

Date of change in employment: [1/23/2017] Current Hourly Wage: Current Hours per Week: Current Title/Position: Current Benefit Type: --None--

Retention Milestones

Milestone Achieved: 30 Days Documentation: Verbal report by client

Notes

Notes

- b. 5/7/15: You call your client to see how the first 90 days of work has gone. You leave a voicemail for your client requesting a return call with an update. Click on your client’s **Case Record**. Click on the RECORD SERVICE button, select Employment Counseling, and click on the NEXT button. Fill in the appropriate information and mark that you did not reach the person you attempted to contact. Add a note at the bottom of the screen by clicking on the ADD ROW button, writing your note, and then clicking on the APPLY button. Click on the SAVE button.

INCOME SUPPORTS COUNSELING SERVICES:

1. Document the activities below:

- a. 1/3/15: You conduct a general benefits screening for your client and find that s/he is eligible for subsidized housing, food stamps, and utility assistance. You help him/her apply for subsidized housing and food stamps, and you refer him/her to another agency for utility assistance. Create a new *Service Entry* for Income Supports Counseling and enter this information. You can ignore the *Staff Person* field, as this is to be used by people entering data on someone else’s behalf. Use the arrow next to the Story you want to use to expand the Story to see all the fields. You may ignore the *UOS* field (unless you want to track how many minutes you spent on each story).

Case Record: Lisa Fake FOC 10/2016 Case Record

From the Case Record, hover over the Service Entries link.

Service Entries New Service Entry Service Entries Help

No records to display

Home Intake Entities Contacts Client Households **Case Records** Groups & Classes Agency Contracts Dashboards Reports +

Select an ECM Service Entry Form

Employment Counseling Financial Counseling **Income Supports Counseling** Work/Education Supports

Next Cancel

Save Save & New Cancel

Service Date

Date: 1/3/2015 [1/10/2017] Start Time: 9:00 AM

Service Details

Staff Person: User Reach person you attempted to contact?: Yes

General Benefits Screening Results: **Completed screening: eligible for at least one benefit** Contact with: Client

Contact/Location Method: In person Duration (Minutes): 60

Eligible Benefits

Eligible for the following benefits

| Available | Chosen |
|---|--|
| Child Care Subsidies | SNAP (food stamps and comparable programs) |
| FAFSA | Subsidized Housing |
| Financial Aid (grants) | Utility Assistance |
| Head Start/Early Head Start | |
| Medical Benefit/Health Insurance | |
| Other Non-Recurring Assistance (cash or non-cash) | |
| Recurring Cash Assistance/Payments | |
| Unemployment Compensation | |
| WIC (Women, Infants & Children) | |

▶ Child Care Subsidies

▶ FAFSA

▶ Financial Aid (grants)

▶ Head Start/Early Head Start

▶ Medical Benefit/Health Insurance

▶ Other Non-Recurring Assistance (cash or non-cash)

▶ Recurring Cash Assistance/Payments

▶ **SNAP (food stamps and comparable programs)**

| Client | UOS | Name of Entity | Status | Frequency of Payment/Subsidy | Amount of B |
|-----------|------|----------------|--------------------------------|------------------------------|-------------|
| Lisa Fake | 0.00 | | Applied (or re-applied) | --None-- | |

Units of Service: Time (Minutes)

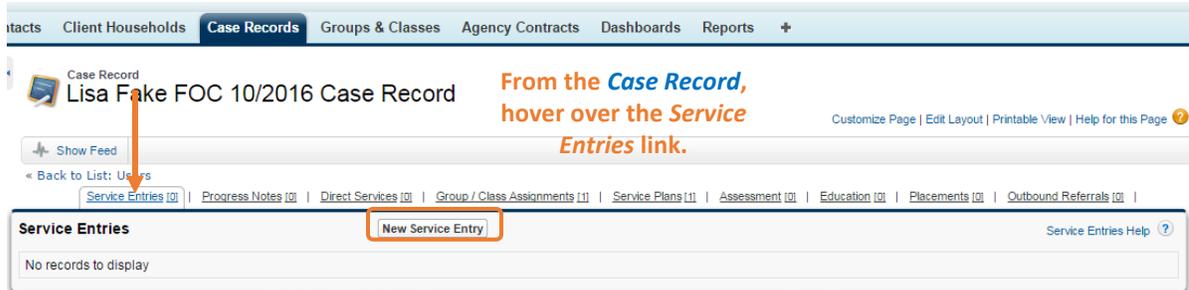
▶ **Subsidized Housing**

| Client | UOS | Name of Entity | Status | Frequency of Payment/Subsidy | Amount of B |
|-----------|------|----------------|--------------------------------|------------------------------|-------------|
| Lisa Fake | 0.00 | | Applied (or re-applied) | --None-- | |

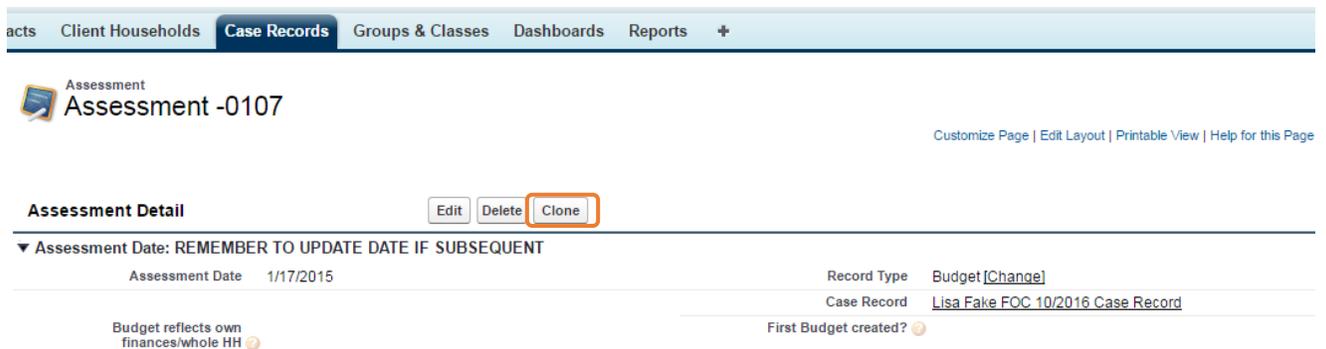
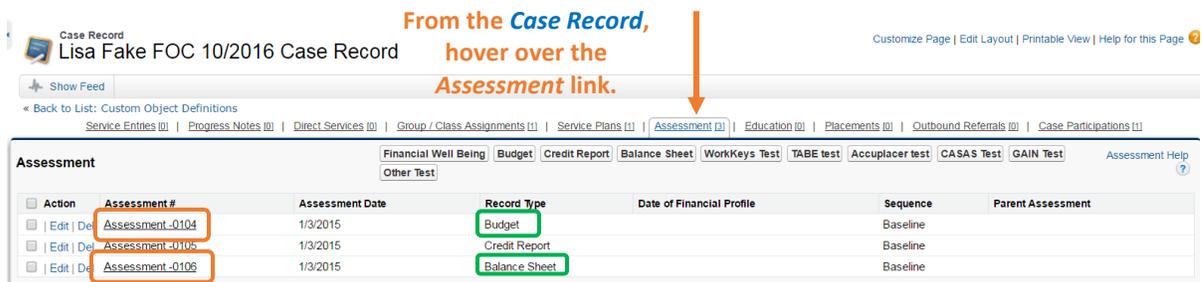
Units of Service: Time (Minutes)

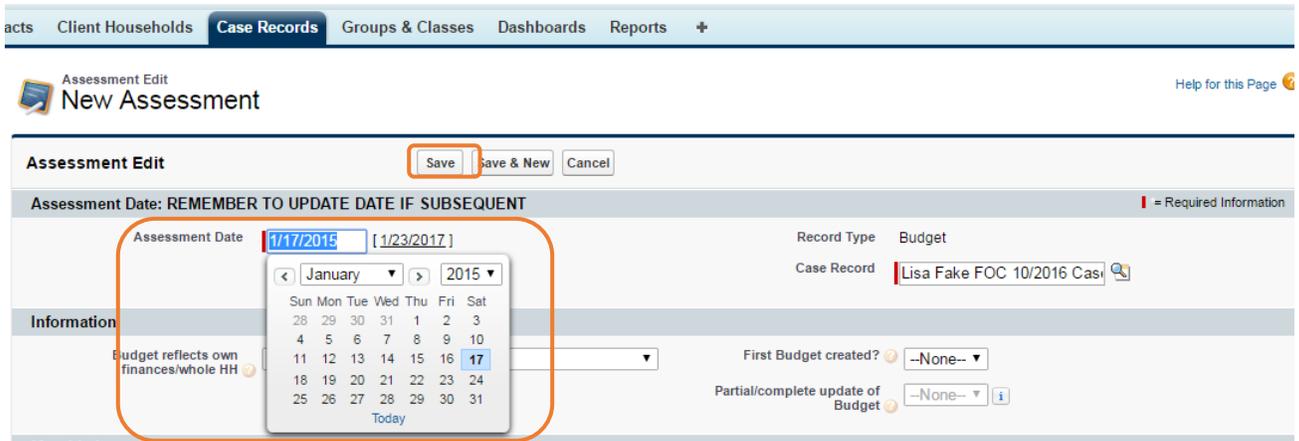
Note: Click on arrow to expand sections.

- b. 2/15/15: Your client calls you to tell you s/he has received food stamps at \$150/month and one-time utility assistance for \$350.
 - i. Enter a Service Entry to update the Food Stamps and Utility Assistance stories.



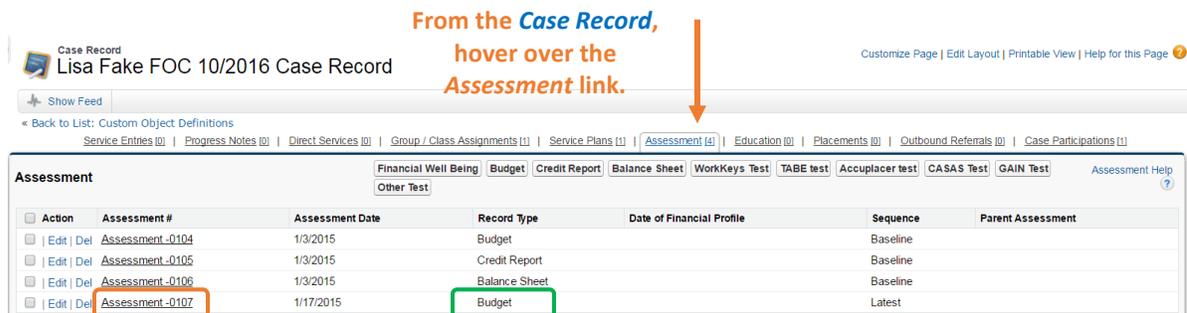
- ii. Update the budget with the food stamps and the balance sheet with the utility assistance. Hover over the Assessments link, and click on the Assessment # next to the most recent Budget. On the next screen, click on the CLONE button to copy the assessment. Enter the correct date, update the necessary information, including the food stamps, and click on the SAVE button. Repeat these steps for the Balance Sheet to reduce the utility liability.





i. Note: Make sure to update the date and click on the SAVE button once the update is complete.

- c. 2/25/15: Your client returns to the office and tells you s/he was approved for subsidized housing, which will pay 50% of his/her rent.
 - i. Enter the Service Entry to update the Subsidized Housing story.
 - ii. Update the budget with the subsidized housing. Hover over the Assessments link, and click on the Assessment # next to the most recent Budget. On the next screen, click on the CLONE button to copy the assessment. Enter the correct date, update the necessary information, including the rent, and click on the SAVE button.



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