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 fftfocsupport@lisc.org or bring your questions to office hours.

Salesforce Login information:

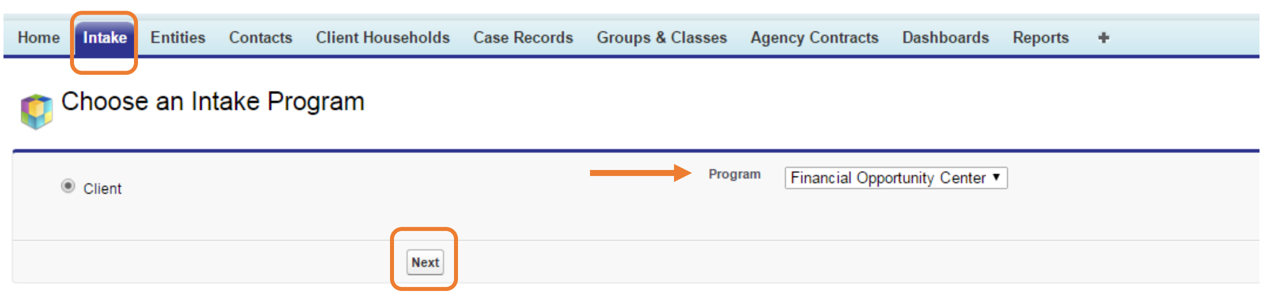
Website: https://partial-lisc.cs29.force.com/partners/login

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

INTAKE:

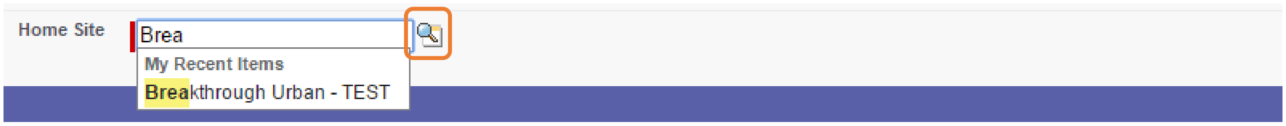
1. Begin by searching for your fake client in the database to avoid creating duplicates.

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.

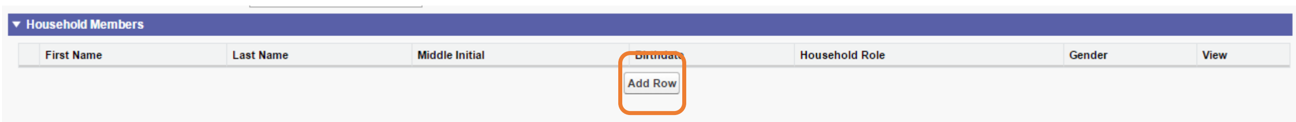


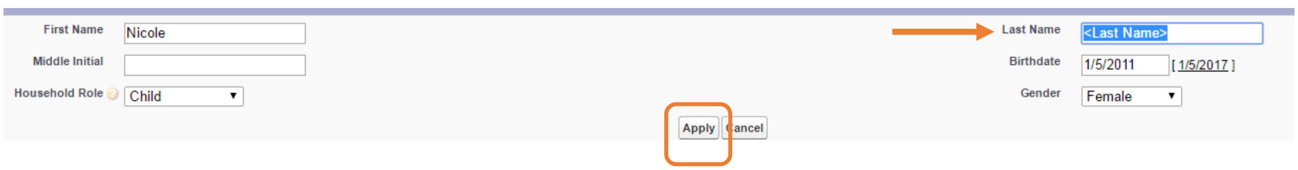
3. You will be directed to the Intake form. Choose a first name for your client and use "Fake" as the last name.
   (1) Complete your client's demographics fields and select the options to indicate your client is currently **in school** and **working**.

   (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).



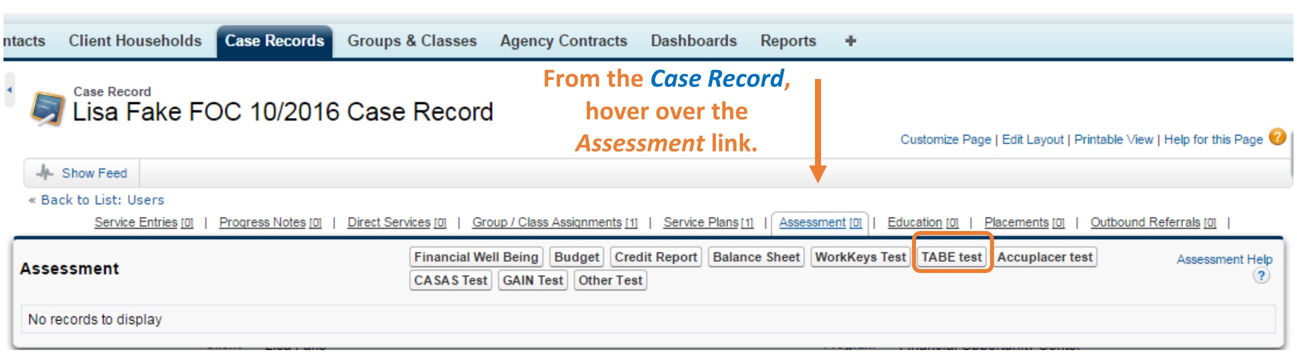
(3) Lastly, add two household members for your client by clicking on the ADD ROW button and entering the applicable information. *Note:* Don't forget to update your client's household member last names. Click on the APPLY button to add your household member.



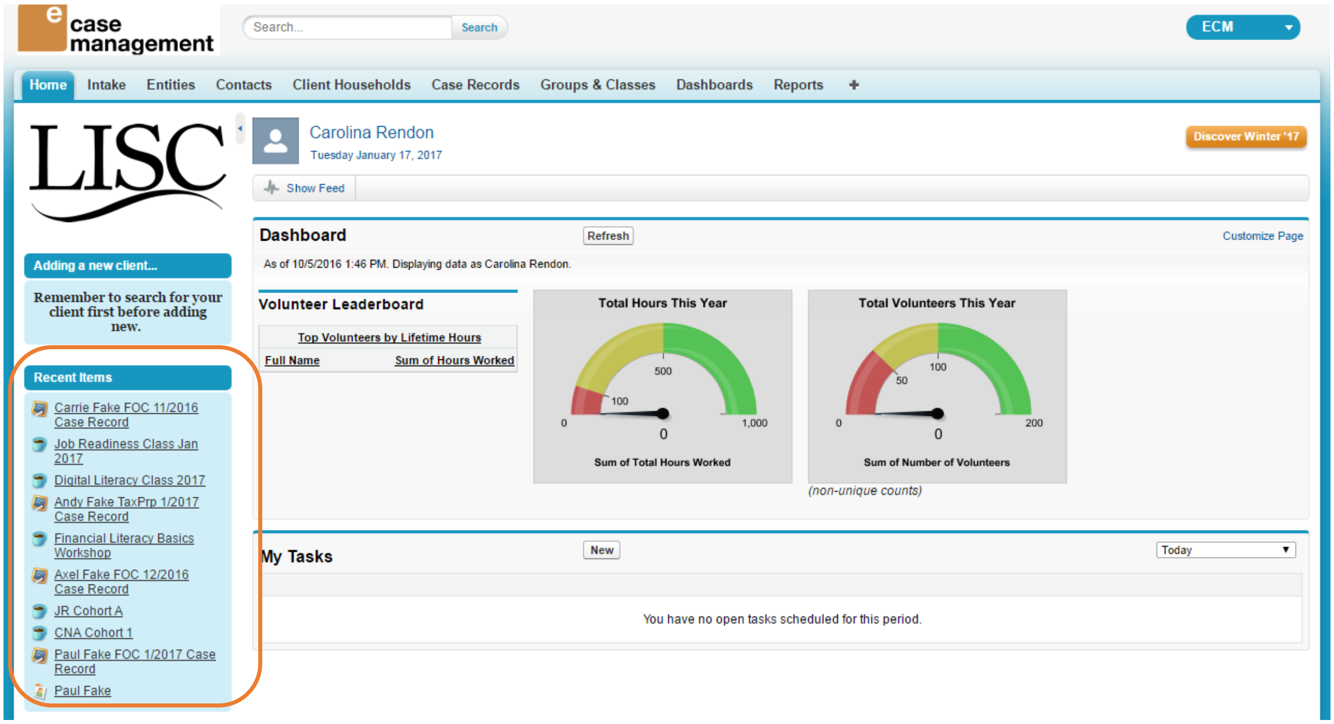


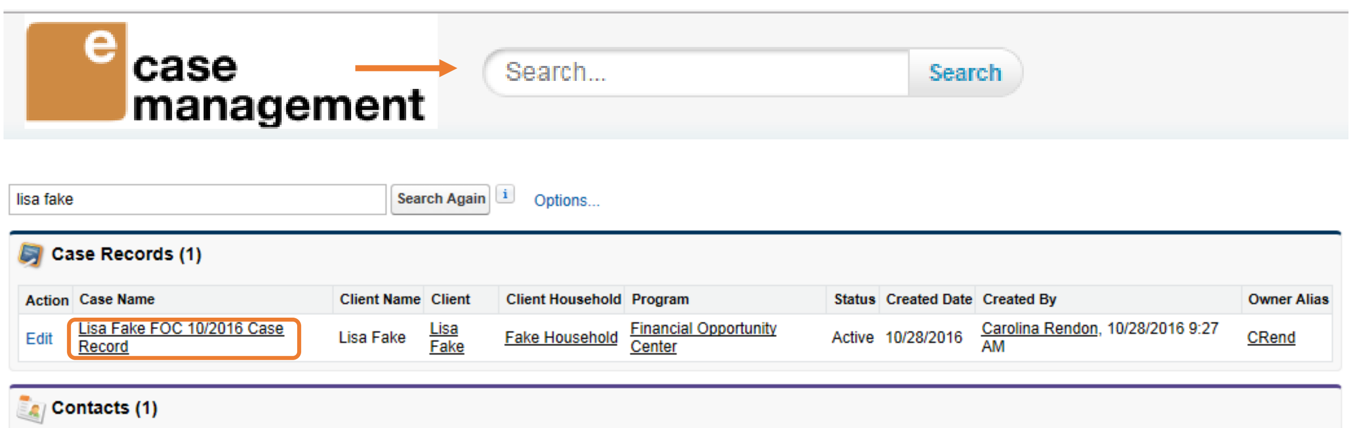
(4) Once completed, click on the SAVE button to add your new client.

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.



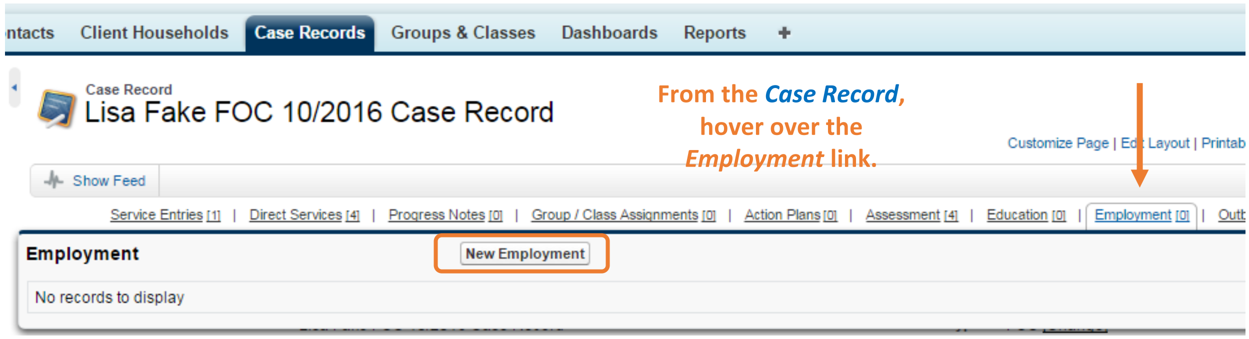
5. Employment Record: Click on your client's **Case Record** in the blue Recent Items box on the left off your screen. (If you do not see your client's case record, you can always search for your client again and click on his/her case record.)





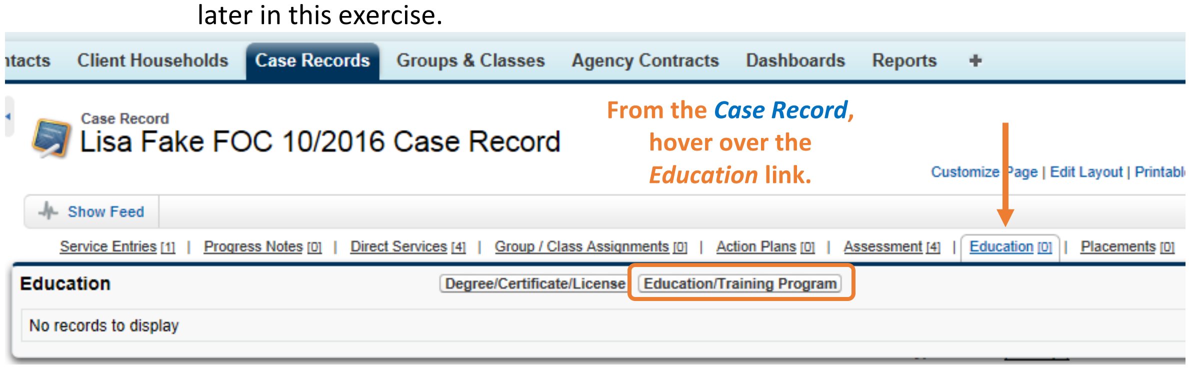
Hover over the Employment link and click on the Employment Record button. Create a new record and indicate the following for your client: has been working 20 hours/week at Best Circuit at $10.00/hour since 10/16/14 as a cashier with no health insurance. Make sure to select *Client had this job before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

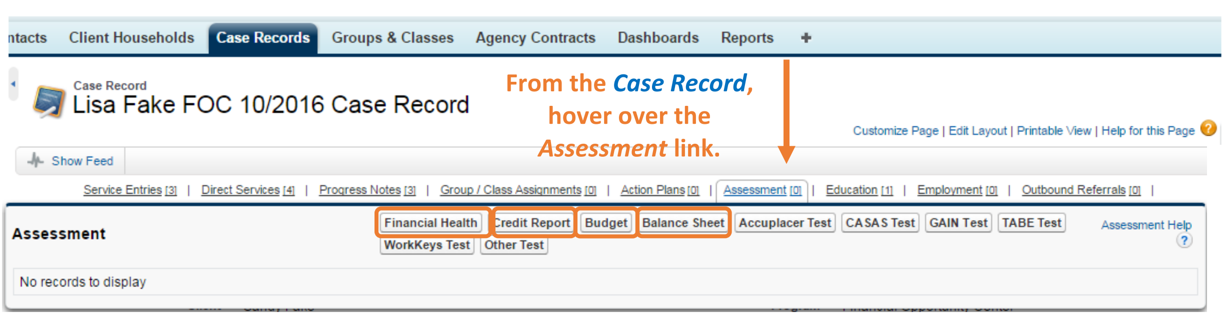
   Hover over the Education link and click on the Education/Training Program button. Create a new record and indicate the following for your client: started at United Community College pursuing an Associate Degree on 8/26/14. Enter the applicable information and click on the SAVE button.
      i. Note: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



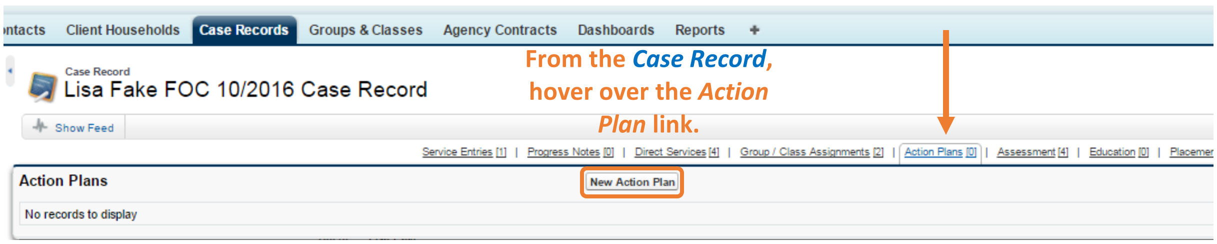
FINANCIAL COUNSELING SERVICES:

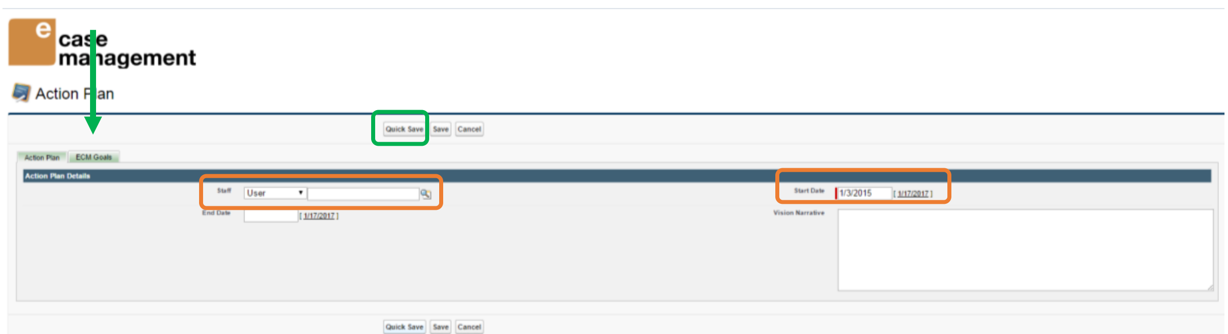
1. Document the activities below:
   a. 1/3/15: Click on your client's **Case Record**. Hover over the *Assessment* link and click on each of the financial assessment buttons (which take the place of the Combined Financial Assessment (CFA). Complete each financial assessment for your client using made-up 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.

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.

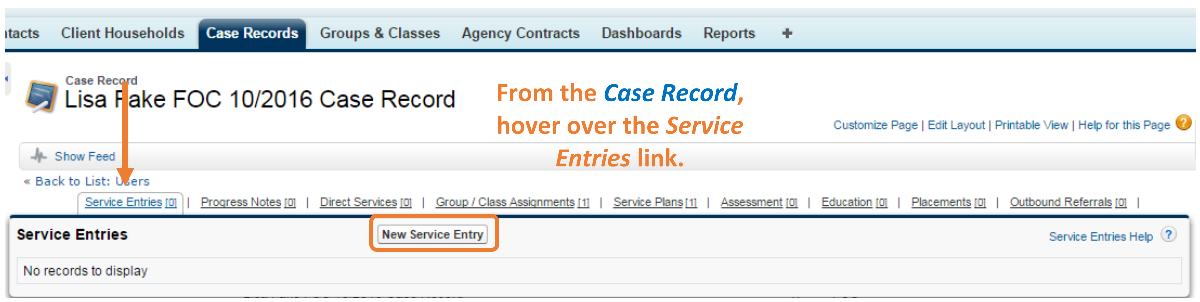


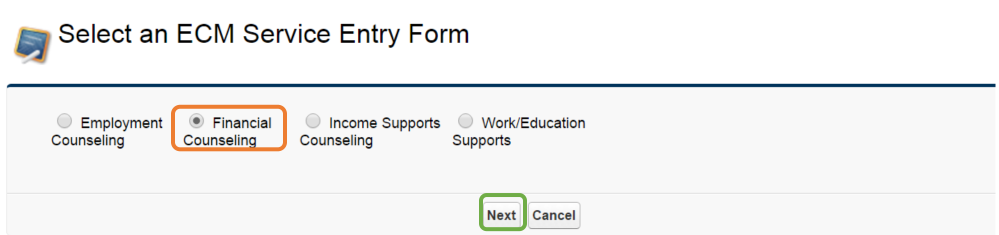
b. 1/3/15: Create an Action Plan (Vision) for your client. Click on your client's **Case Record**. Hover over the Action Plans link and click on the New Action Plan button. Ignore the *Staff* field (this is to be used by someone entering data on someone else's behalf). Enter 1/3/15 as the *Start Date*, 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.



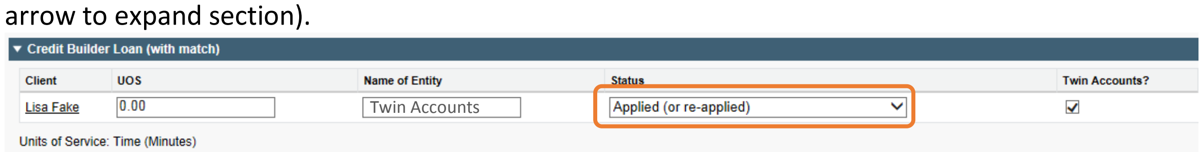


c. 1/10/15: Click on your client's **Case Record**. Hover over the Service Entries link and click on the New Service Entry button. Click on Financial Counseling and click on the NEXT button. Your client comes into the office to discuss his/her family's housing situation. S/he hopes to move his/her family 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.

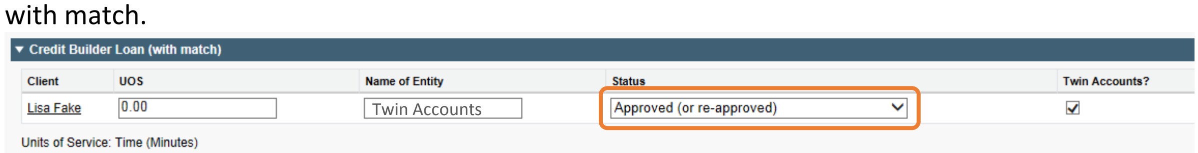




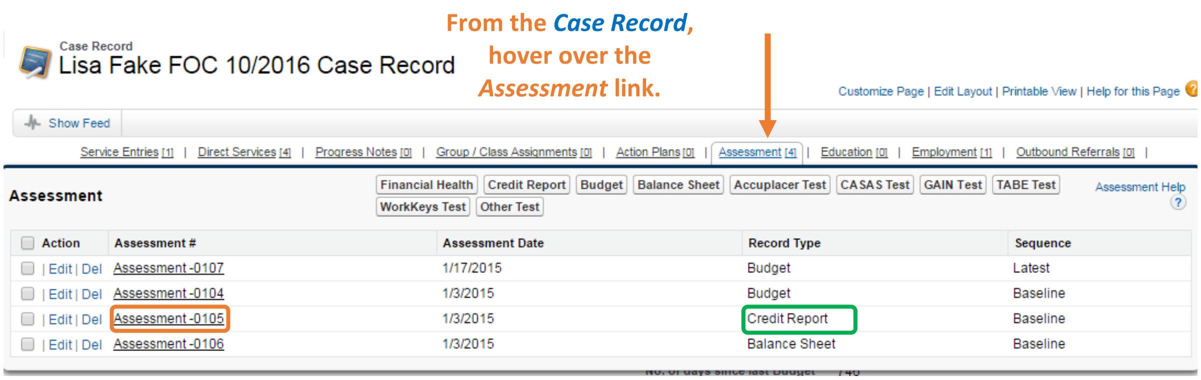
2. 1/17/15: Your client calls you to tell you s/he applied for the credit builder loan with match. (Click on arrow to expand section).



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



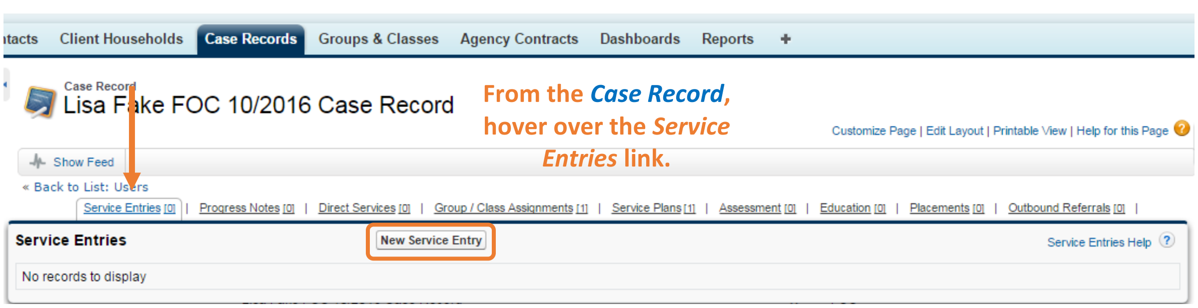
4. 7/13/15: You pull your client's credit to check for improvements. You find that your client's FICO score has improved to 550. Click on your fake client's Case Record. Hover over the Assessment link and click on the assessment # you need to update. On the next screen, click on the CLONE button to copy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

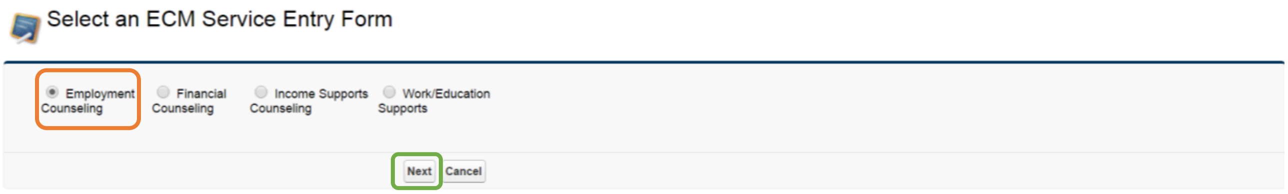


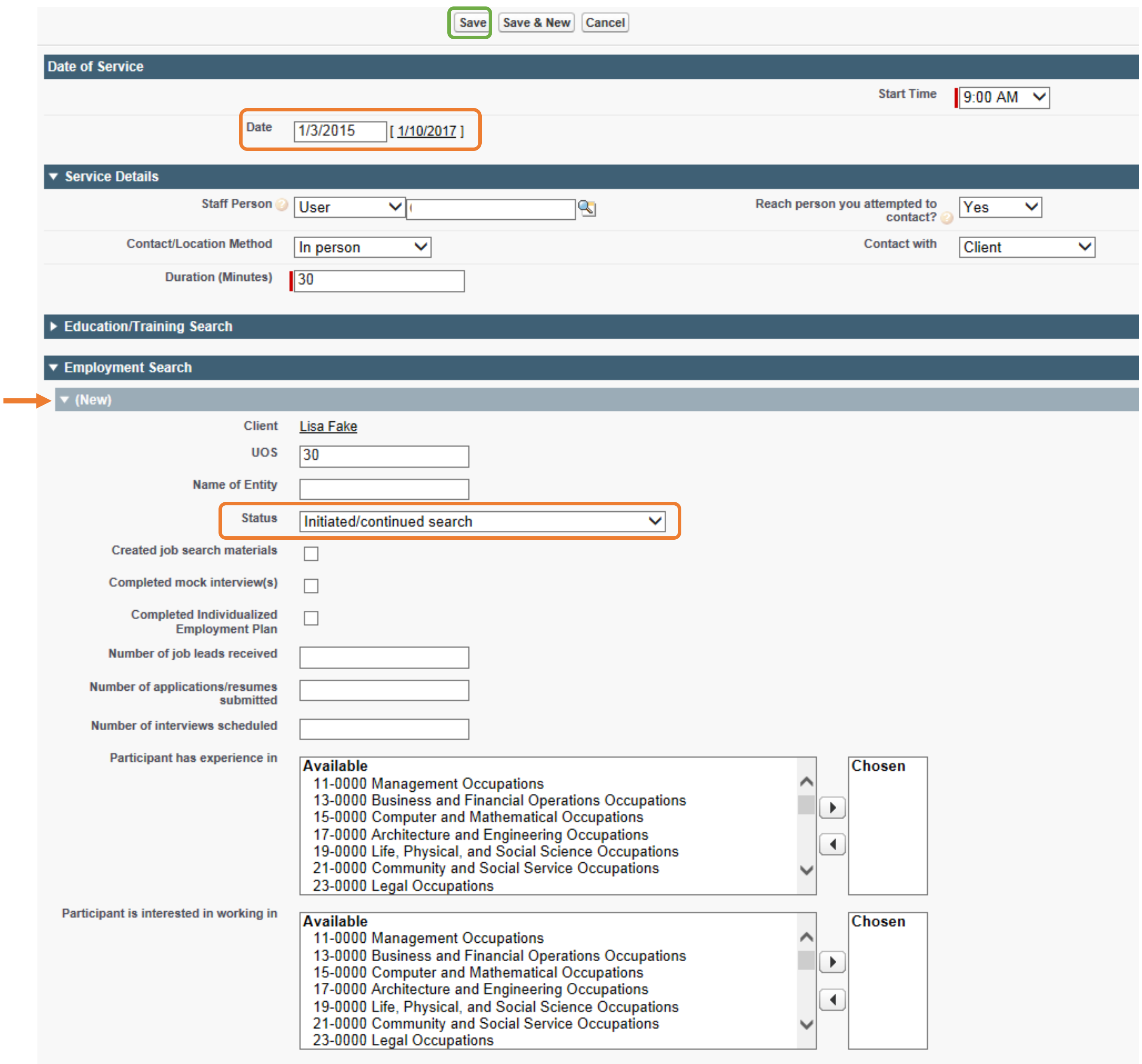
EMPLOYMENT COUNSELING SERVICES:

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).

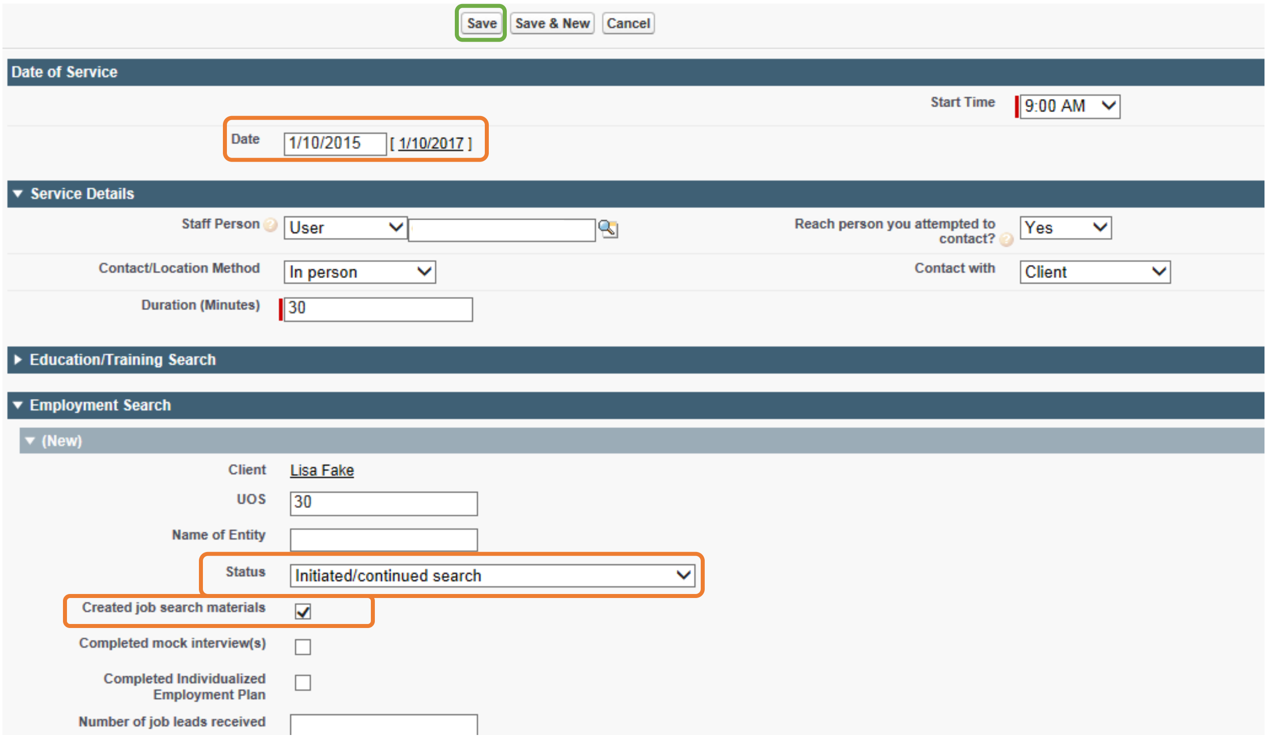




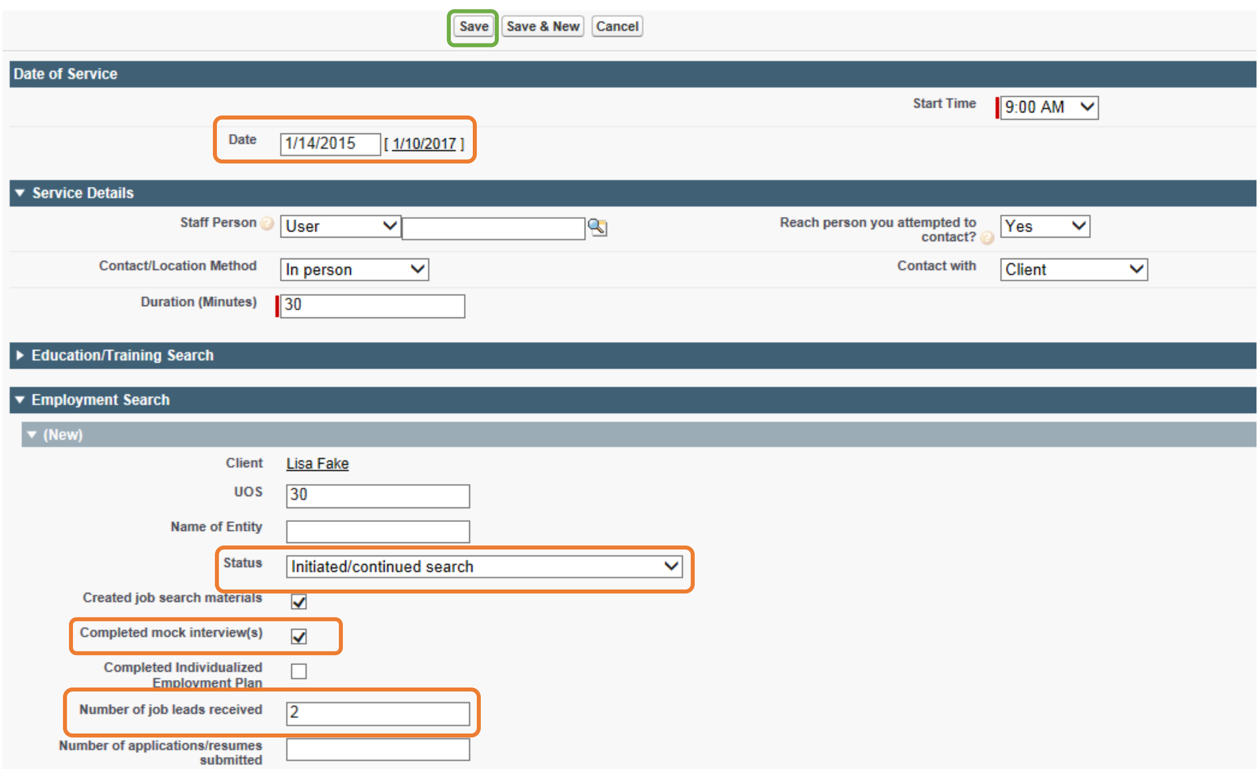


Note: Click on (New) to expand the section.

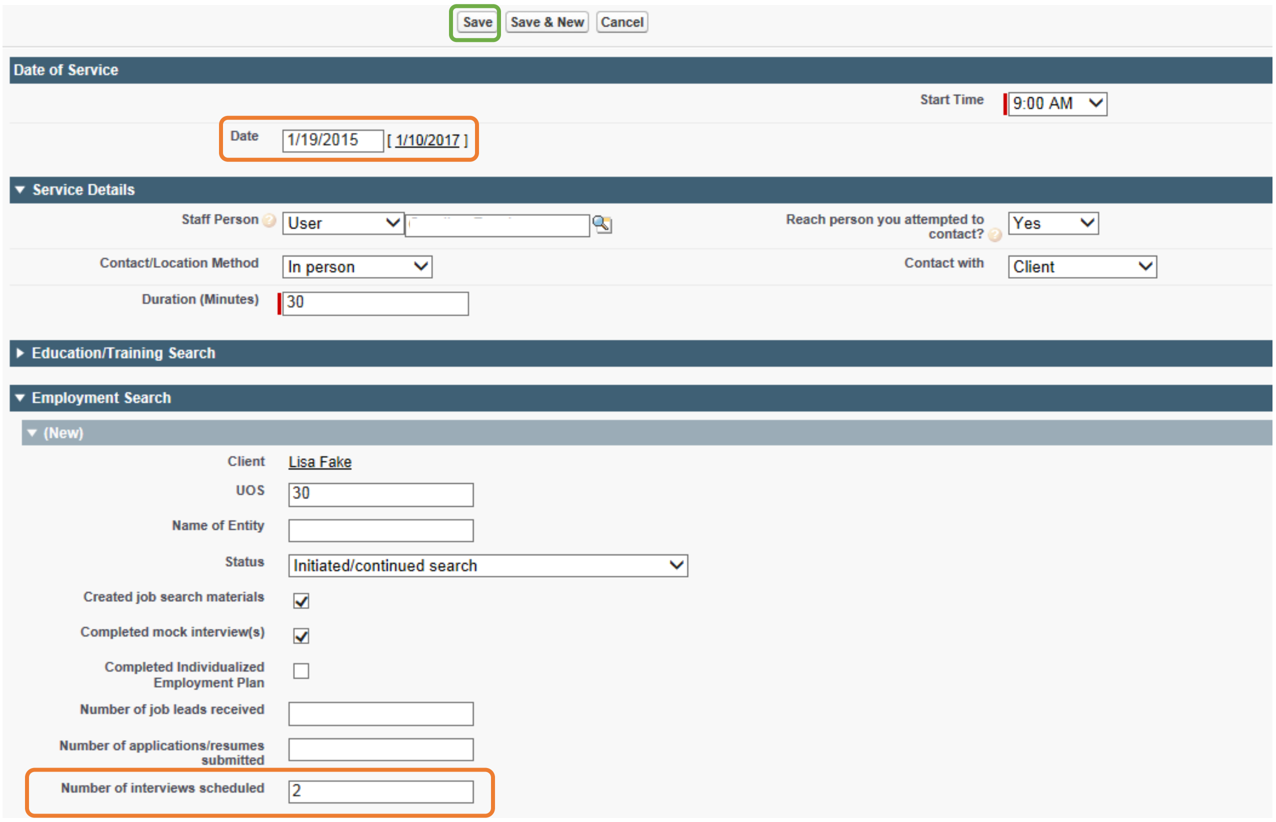
b. 1/10/15: You meet with your client to finalize his/her resume.



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

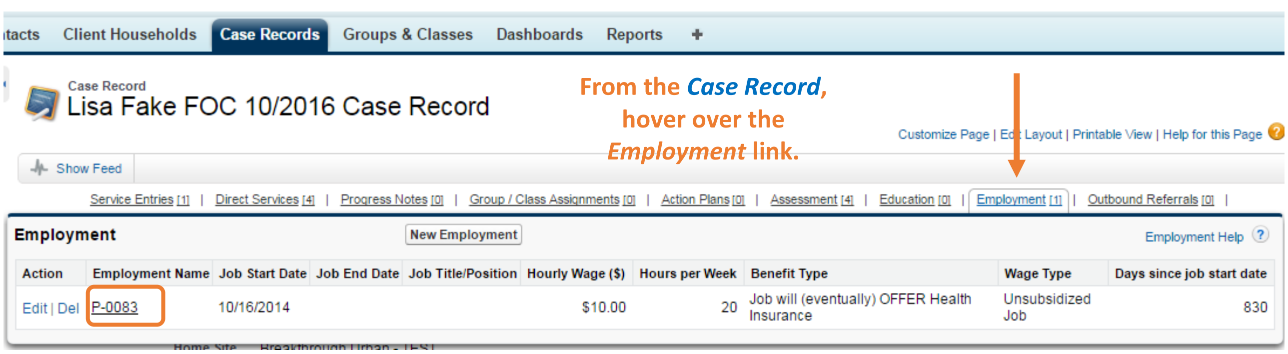


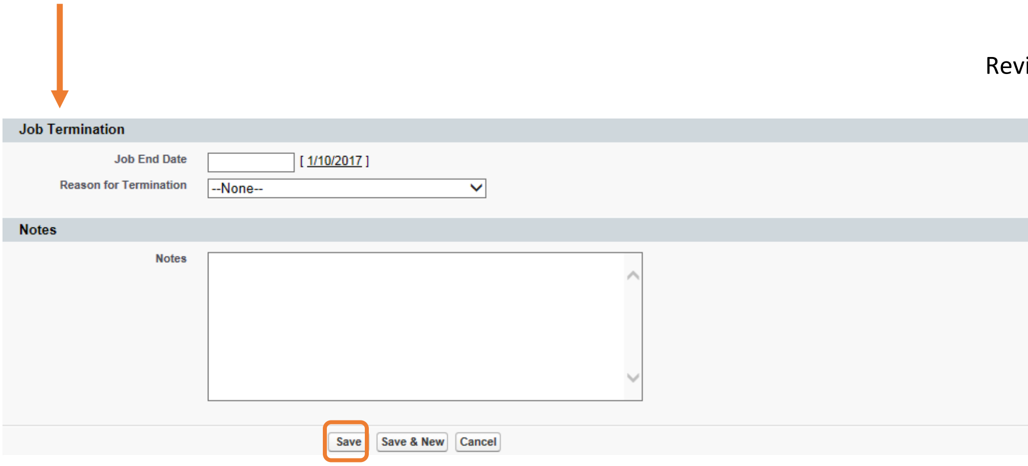
d. 1/19/15: Your client calls you to tell you s/he has scheduled an interview for a new job on 1/26/15.



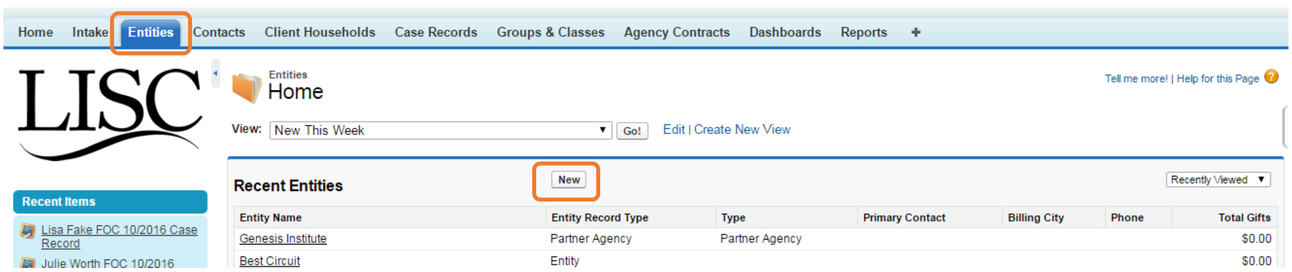
e. 2/10/15: Your client calls to say that s/he got the new job and quit his/her previous job on 2/3/15.

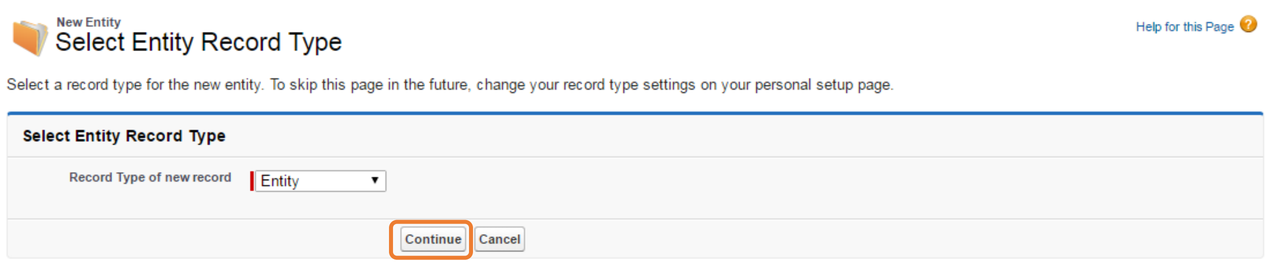
i. Terminate the current job. (Hover over the *Placements* link and edit the current job). Fill in the **Job Termination** section and click on the SAVE button.

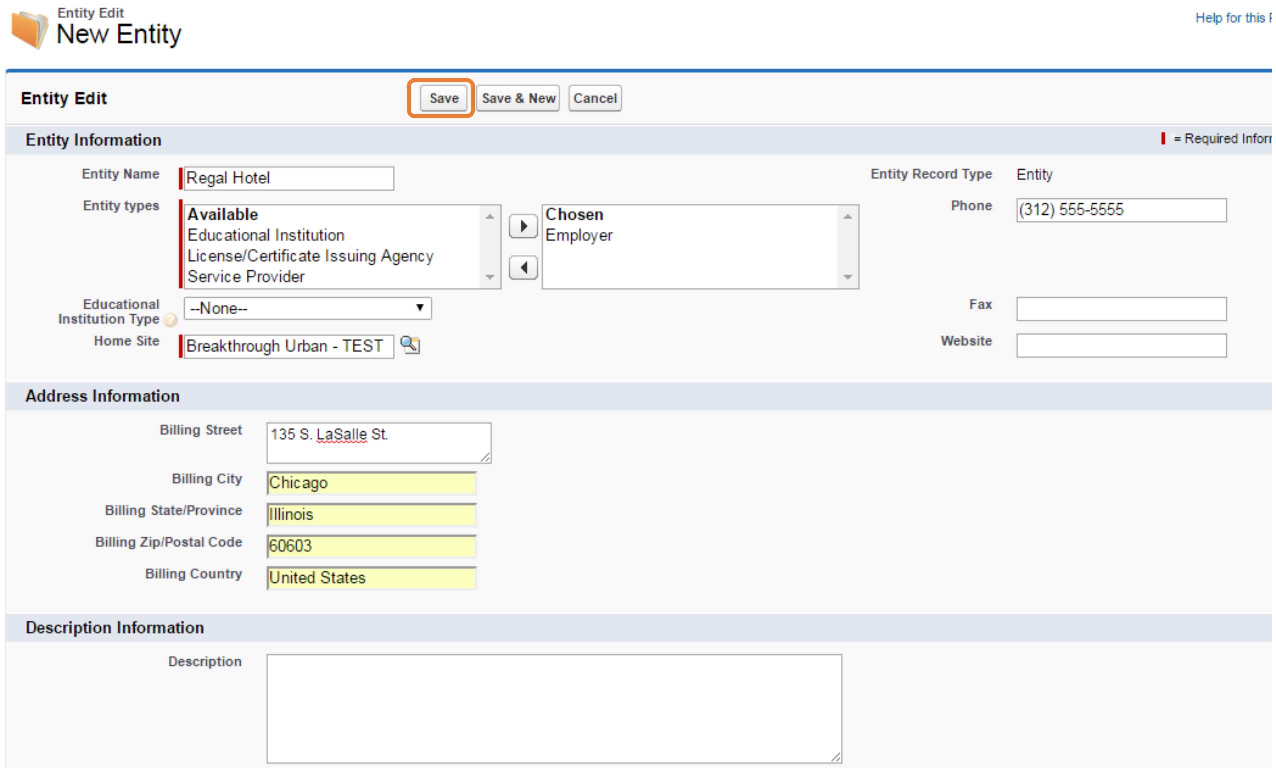




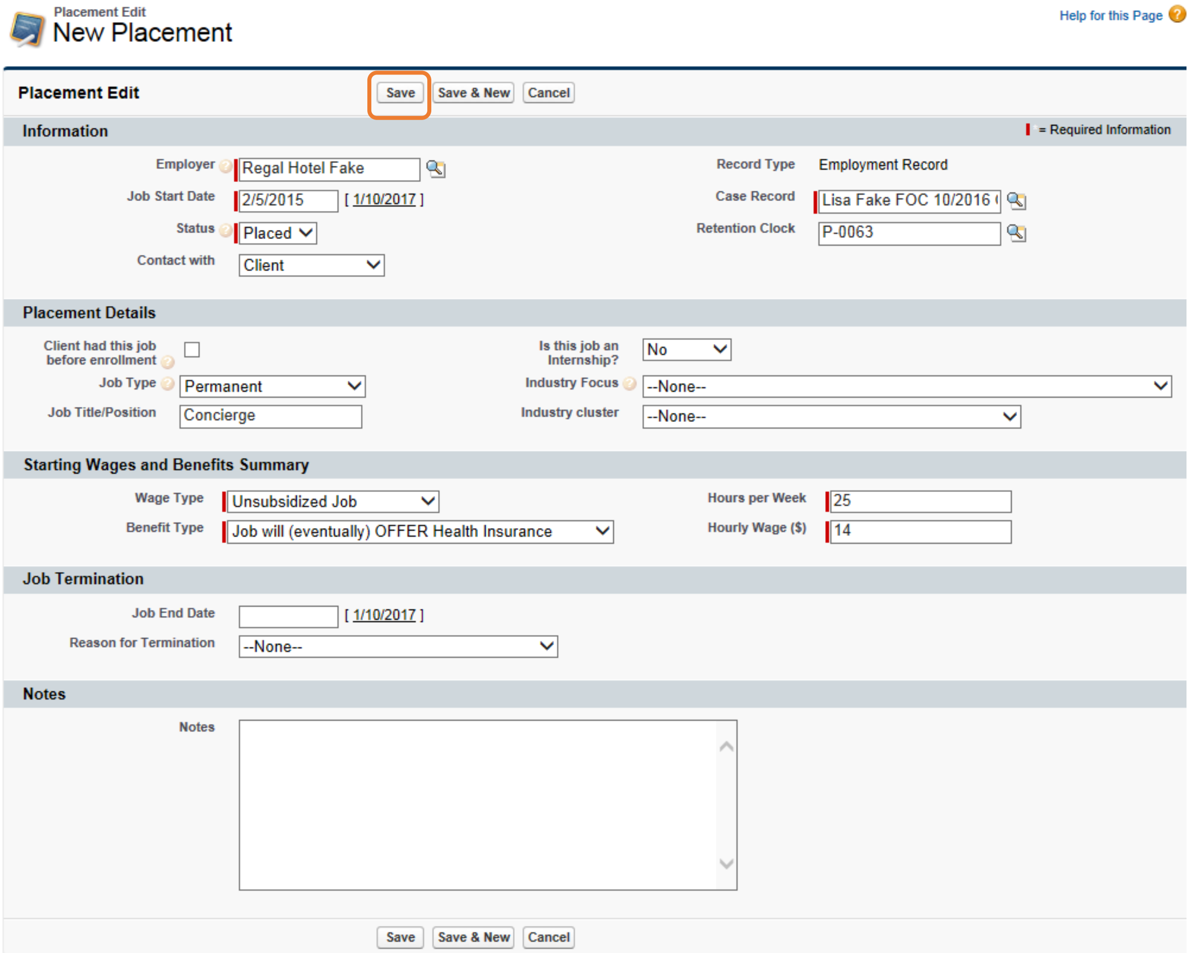
ii. Add [Your name] Fake Hotel as a new *Entity.* Click on the Entities tab and click on the NEW button. On the next page, select Entity as the type, and click on the CONTINUE button. Select Employer as the Entity type, and ignore the Educational Institution Type field. Fill in the appropriate information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



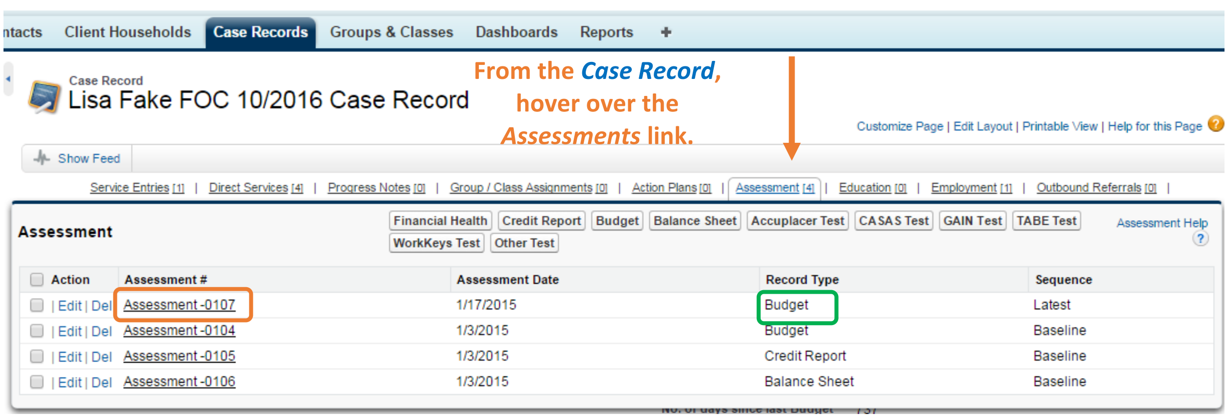


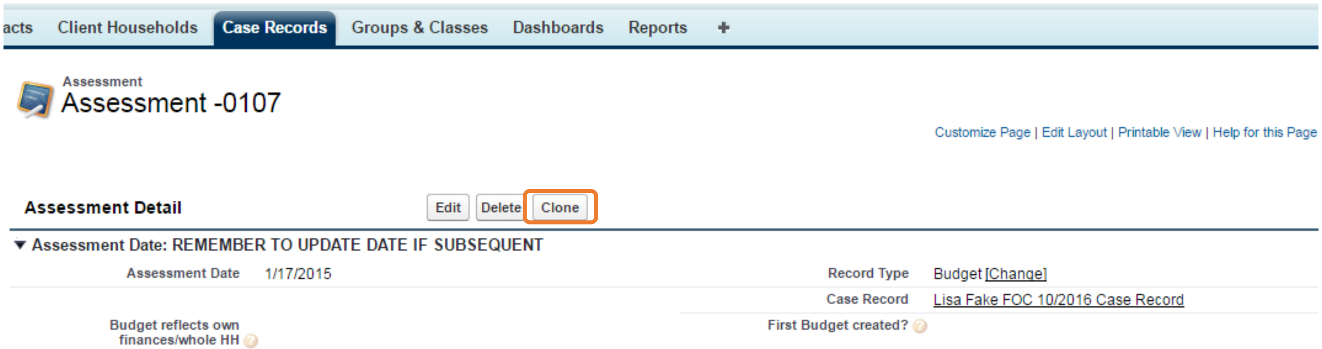


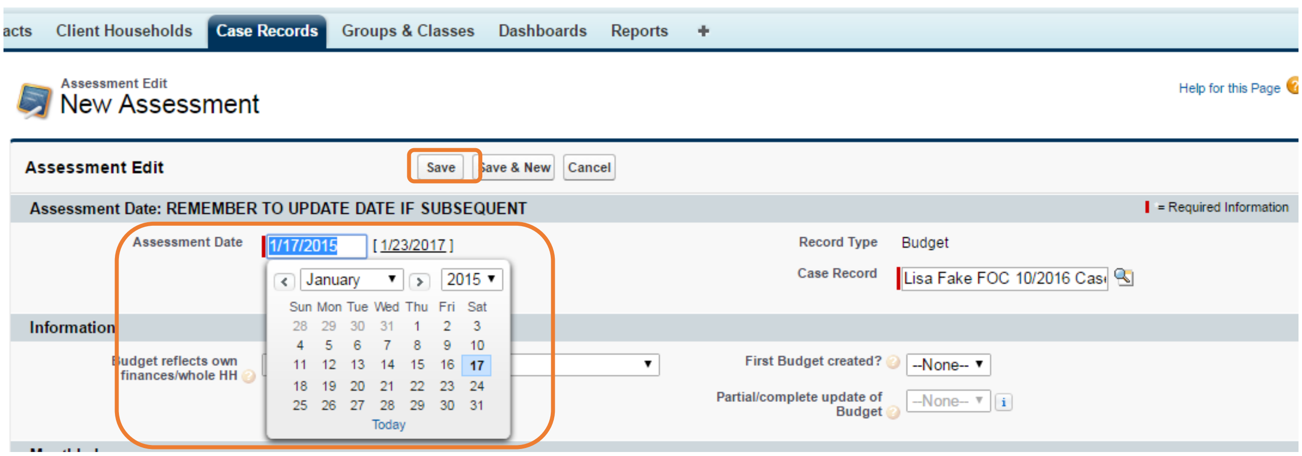
iii. Hover over the Placements link and click on the Employment Record button. Enter your client's new Employment Placement at [Your name] Fake Hotel as a concierge working 25 hours/week at $14.00/hour. The job started on 2/5/15. The new job will offer health insurance after 90 days, so select Job will (eventually) OFFER Health Insurance in the *Benefit Type* field. Fill in the applicable data and click on the SAVE button.



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.

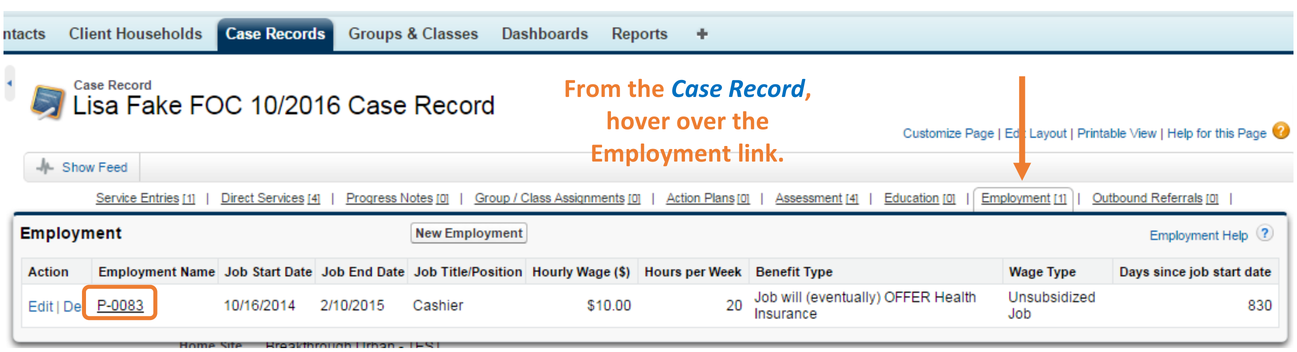


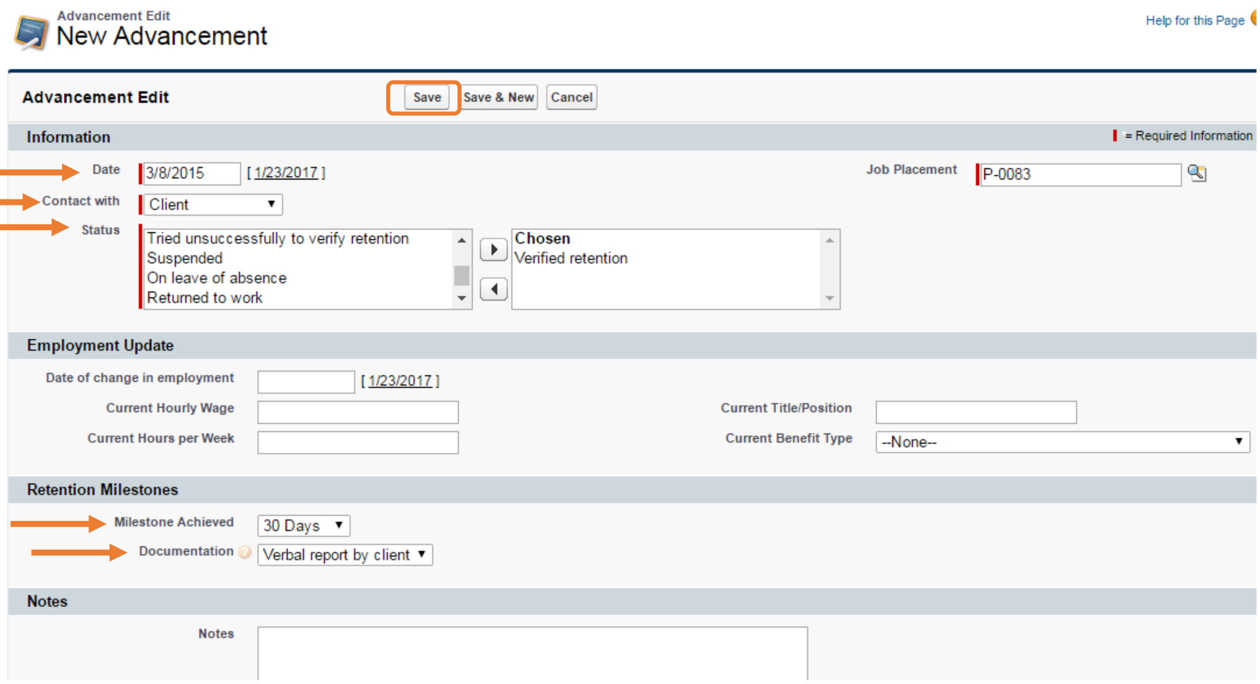




i. Note: Make sure to update the date and click on the SAVE button once the update is complete.

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.



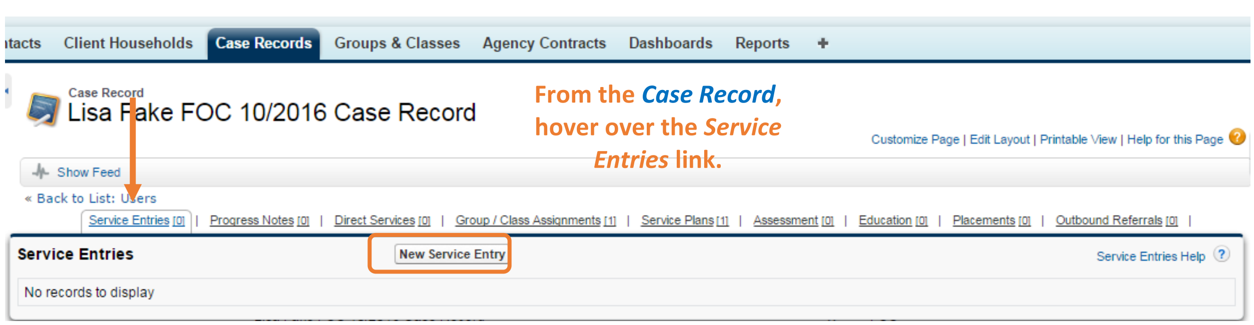


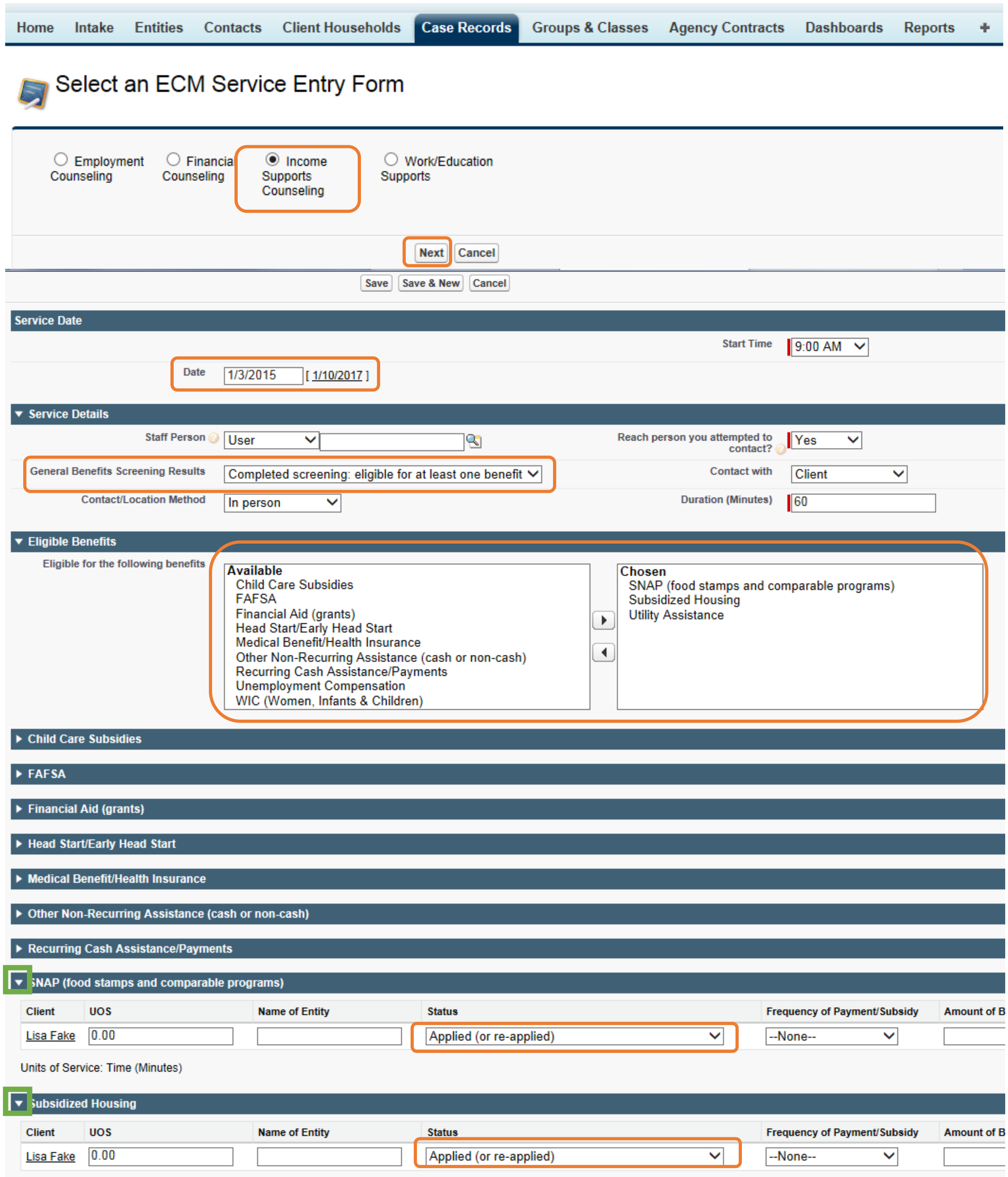
b. 5/7/15: You call your client to see how the first 90 days of work has gone. You leave a voicemail for your client requesting a return call with an update. Click on your client's **Case Record**. Click on the RECORD SERVICE button, select Employment Counseling, and click on the NEXT button. Fill in 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).

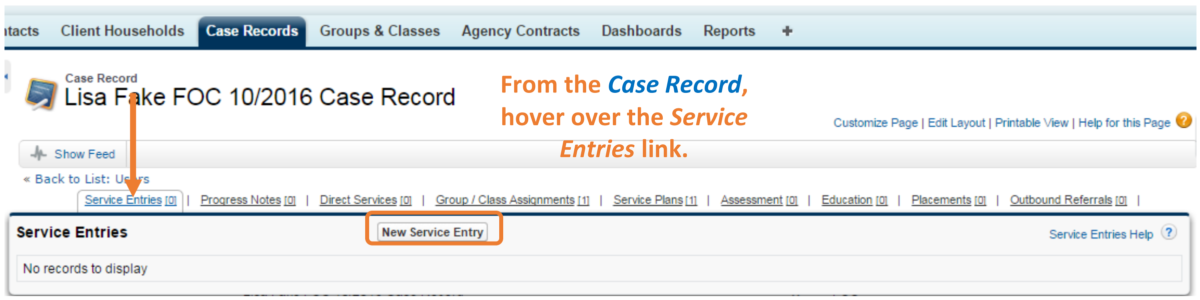




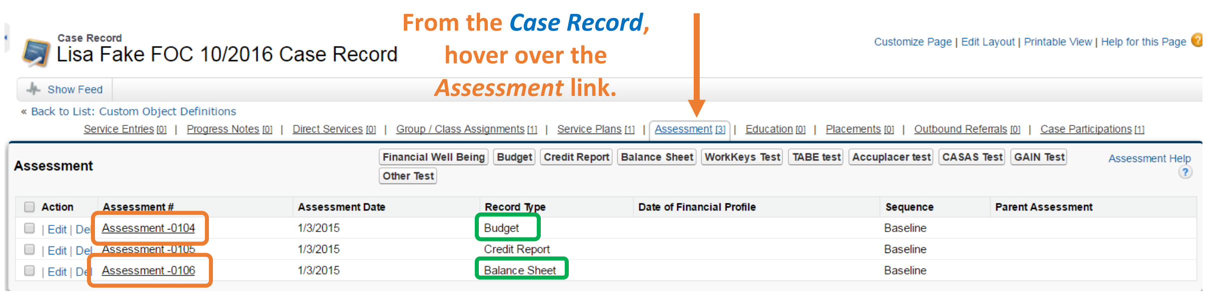
Note: Click on arrow to expand sections.

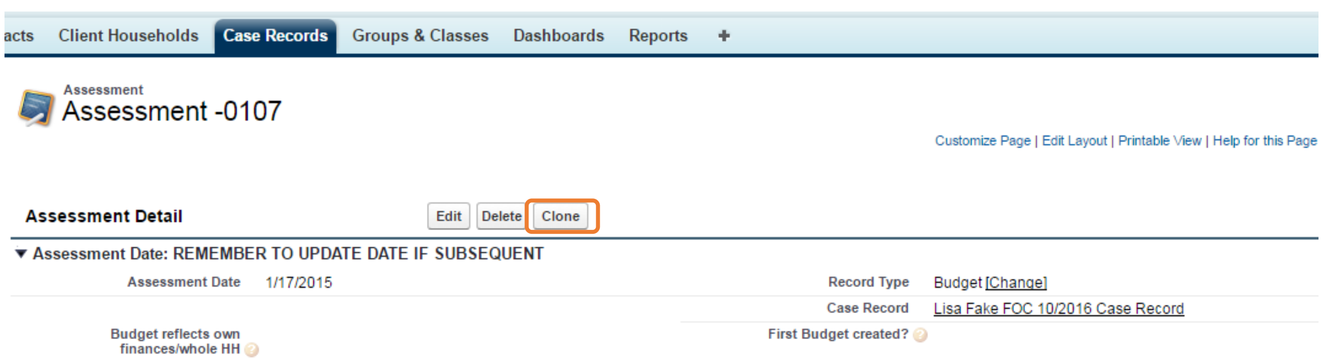
b. 2/15/15: Your client calls you to tell you s/he has received food stamps at $150/month and one-time utility assistance for $350.

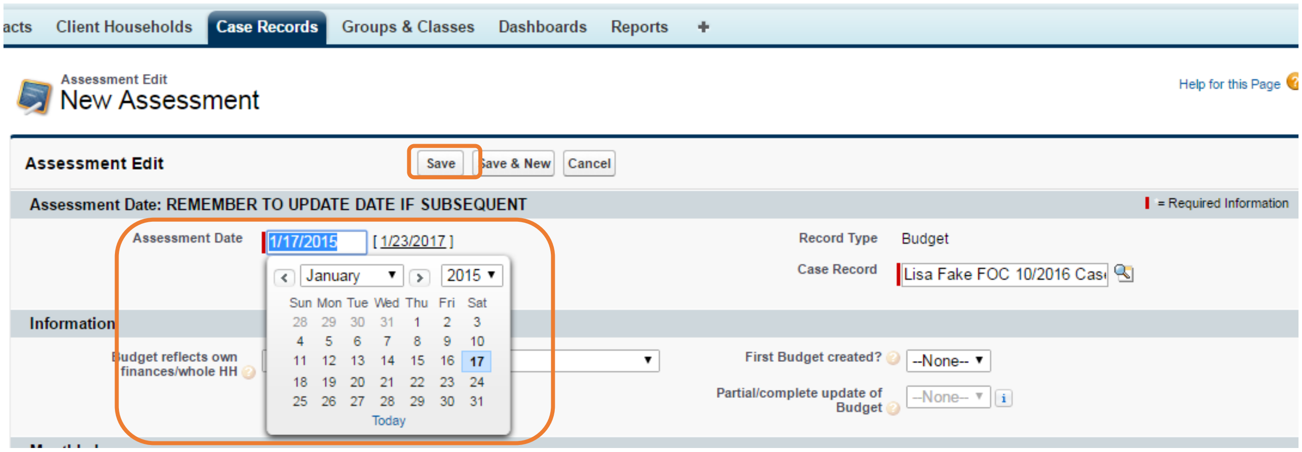
   i. Enter a Service Entry to update the Food Stamps and Utility Assistance stories.



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.