<u>Salesforce Instructions for DOL Reentry grant</u>: This guide will walk you through how to enter your participant into the "DOL: Reentry" group for reporting.

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management		Search Search	Melinda Carmichael 🗸
Home Intake Entities Co	tacts Case Records Client Households Groups & Classes Reports [Dashboards	
IISC	Sally Fake FOC 9/2017 Case Record		Printable View
	J- Hide Feed		
	💬 Post 📲 File 🦧 New Task 🛛 More 👻	Follow	
Adding a new client	Write something	Share Followers	
Remember to search for your client first before adding new.	Q Show All Updates *	No followers.	
Recent Items	Melinda Carmichael (Partner) changed Case Name from Sally Fake Case Record to Sally Fake FOC 9/2017 Case Record.		
Sally Fake FOC 9/2017 Case Record			
Jackie Fake FOC 9/2017 Case Record			
Financial Opportunity Center	Case Record has been updated.		
Fake Household	Back to List: Case Records Sanciae Entries (4) Direct Sanciae (2) Torrest Notes (4) Artic	on Plans (1) Assessment (54) Education (0) Employment (0) Outhou	d In as Melinda Carmichael (mcarm@lisc.org) Melinda Carmichael Printable View Printable View Q Quitbound Referrata (2) Interpretation (2)
Sally Fake			
Marie Fake FOC 9/2017 Case Record	Case Record Detail Edit Delete Sharing F	Record Service Edit Intake	
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Fake Household	Client Sally Fake	Program <u>Financial Opportunity C</u>	enter
Marie Fake	Home Site Breakthrough Urban - TEST		
	# of days since last (attempted) .110	No. of days since last Financial 10	Y

• Search for your client's case record and click on edit

• Scroll down to "Group(s) for reporting"

BCO Client 🤣 📄	BCO Start Date 🥥 [12/15/2017]					
FOC Assigned Staff						
Coaching Agreement Signed?	Coaching Agreement Date [12/15/2017] Financial Coach Support Coach Support Coach Support Coach Support Coach Staff					
Group(s) for Reporting						
Group(s) for reporting Accenture LX Adult Learning Lab BuildingA	Chosen DOL: Reentry					

- Scroll through the available groups and find "DOL: Reentry", then click on the arrow to move to the chosen box.
- Scroll back to the top of the case record and click save

e case management					Search	Searc	Logged in as Melinda Carmie	chael (mcarm@lisc.org)
Home Intake Entities Conta	Icts Case Records	Client Households	Groups & Classes	Reports	Dashboards			
LISC	Case Record Edit Sally Fake Case Record Edit Information	e FOC 9/2017	Case Record	Save & New	Cancel			E Required Information
Adding a new client Remember to search for your client first before adding new.		Case Name Sally Fak Client Sally Fak Home Site Breakthro	e FOC 9/2017 Case	3		Record Type Program	FOC Financial Opportunity Center 🕄	1

Required DOL-REO assessments in Salesforce

In addition to standard Salesforce reporting (i.e. service entries, progress notes, employment and education detail, job retention reporting, etc.) – two assessments specific to LISC DOL-Reentry will be required of all REO participants. They are:

- DOL Intake assessment: To be completed at the time of program entry (only) for all REO participants
- **DOL Outcomes** assessment: This assessment is to be completed at **all** of the following points in time:
 - o 6 months after program enrollment
 - Job placement
 - o Program exit
- To locate REO assessments, locate your client's case record and hover over the "Assessment"

S (2) Skype × Case Record: Carrie Fake ×								0 -	D	:		
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(Search Search						From the client case record, hover over "Assessment"					
ont	Client H	touseholds Case Re	cords Groups & Groups	classes Report	s Dashboard	s +	button to lo participant	ocate to ass s ('REO Inta	sessments need ake' and 'REO C	ded for DO Outcomes'	L-REO	
	Show Fee	Service Entries [1]	Direct Services [6] Pr	rogress Notes [3] Gi	oup / Class Assignr	nents [3]	Action Plans [1]	sment [9] Education	[1] Employment [0] Outbou	und Referrals [1]		
	Assessment Financial Health Credit Report Budget Other Test RED Outcomes					Balance Sheet Accuplacer Test CASAS Test GAIN Test TABE Test WorkKeys Test Assessment Help ? ************************************						
	Action	Assessment #	Assessment Date	Record Type	Sequence	1	Total Monthly Net Income	Total Net Worth	TransUnion FICO Score	Financial well-be	ing score	
I	🔲 Edit Del	Assessment -1175670	12/21/2017	REO Outcomes	Baseline		\$0.00	\$0.00				
l	🔲 Edit Del	Assessment -1175227	12/20/2017	REO Intake	Baseline		\$0.00	\$0.00				
l	🔲 Edit Del	Assessment -1174465	12/19/2017	Credit Report	Latest		\$0.00	\$0.00	650			
l	🔲 Edit Del	Assessment -1174268	12/18/2017	Budget	Baseline		\$0.00	\$0.00				
l	🔲 Edit Del	Assessment -1174272	12/18/2017	Balance Sheet	Baseline		\$0.00	\$0.00				
l	🔲 Edit Del	Assessment -1174460	12/18/2017	Credit Report	Baseline		\$0.00	\$0.00	600			
l	🔲 Edit Del	Assessment -1153706	9/11/2017	Financial Health	Intermediate		\$0.00	\$0.00			53	
I	🔲 Edit Del	Assessment -1153710	9/11/2017	Financial Health	Latest		\$0.00	\$0.00			53	
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- At time of intake, click on and fully complete "REO Intake."
- Click on and complete a new "REO Outcomes" assessment when your client gets a job, has been enrolled for 6 months, or exits the program. Be sure to hover over any question marks for more context on fields to report data.