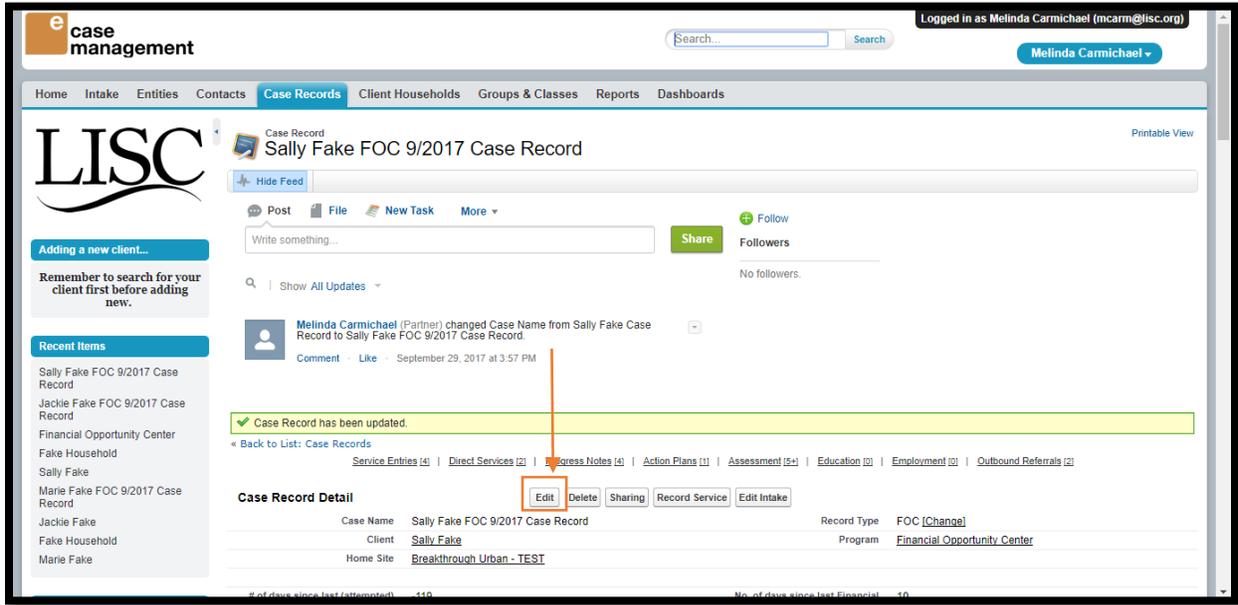
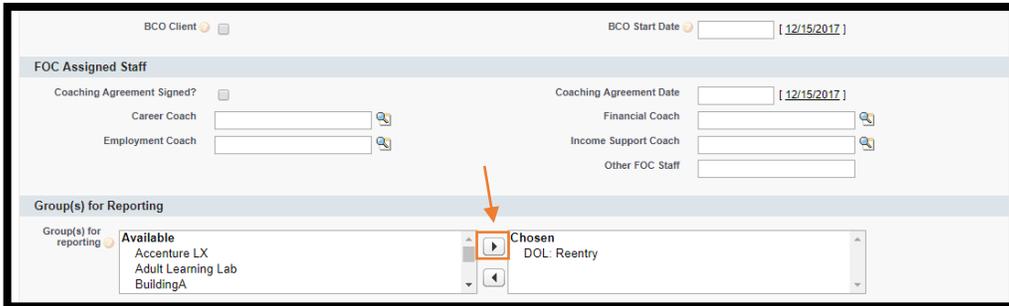


Salesforce Instructions for DOL Reentry grant: This guide will walk you through how to enter your participant into the “DOL: Reentry” group for reporting.

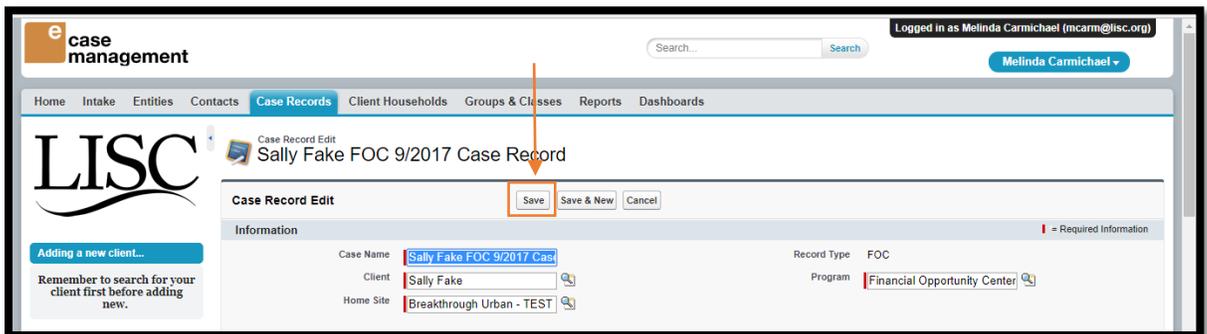
- Search for your client’s case record and click on edit



- Scroll down to “Group(s) for reporting”



- 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



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:
 - 6 months after program enrollment
 - Job placement
 - Program exit
- To locate REO assessments, locate your client’s case record and hover over the “Assessment”

From the client case record, hover over “Assessment” button to locate to assessments needed for DOL-REO participants (“REO Intake” and “REO Outcomes”)

Action	Assessment #	Assessment Date	Record Type	Sequence	Total Monthly Net Income	Total Net Worth	TransUnion FICO Score	Financial well-being score
Edit Del	Assessment -1175670	12/21/2017	REO Outcomes	Baseline	\$0.00	\$0.00		
Edit Del	Assessment -1175227	12/20/2017	REO Intake	Baseline	\$0.00	\$0.00		
Edit Del	Assessment -1174465	12/19/2017	Credit Report	Latest	\$0.00	\$0.00	650	
Edit Del	Assessment -1174268	12/18/2017	Budget	Baseline	\$0.00	\$0.00		
Edit Del	Assessment -1174272	12/18/2017	Balance Sheet	Baseline	\$0.00	\$0.00		
Edit Del	Assessment -1174460	12/18/2017	Credit Report	Baseline	\$0.00	\$0.00	600	
Edit Del	Assessment -1153706	9/11/2017	Financial Health	Intermediate	\$0.00	\$0.00		53
Edit Del	Assessment -1153710	9/11/2017	Financial Health	Latest	\$0.00	\$0.00		53
Edit Del	Assessment -1153712	9/2/2017	Financial Health	Baseline	\$0.00	\$0.00		42

- 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.