Revised on: 1/23/2019

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 test 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 question to support office hours.

Salesforce Login information:

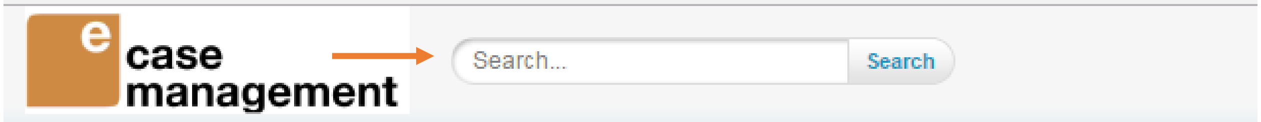
Website: https://lisc.force.com/partners/login
User Name: Email Address
Password: Managed by the users

Learning Objectives:

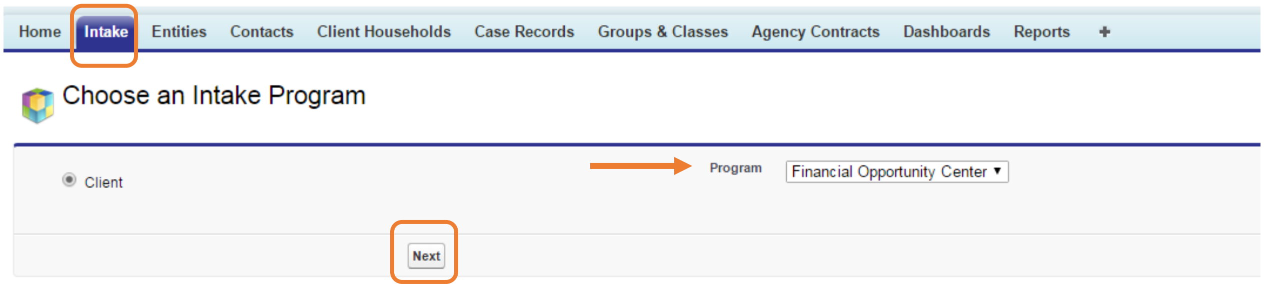
1. Search for a participant
2. Add a new participant
3. Enter demographics
4. Add household members
5. Submit Intake and add Case Record details
6. Add Test Assessment(s)
8. Add an Employment Record
9. Add an Education/Training Program Record

INTAKE:

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


e case management
Search...
Search

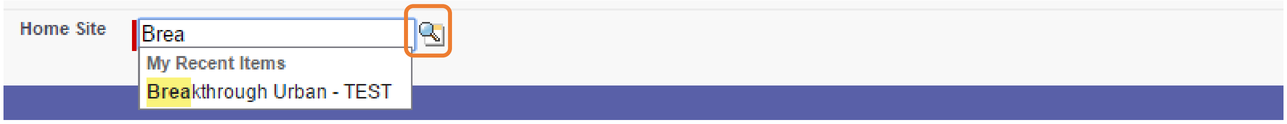
2. Once you have verified your test client is not in the database, proceed to add your client by clicking on the “Intake” tab (make sure to select *Financial Opportunity Center* as the *Program* for enrollment). Click on NEXT.


Home
Intake
Entities
Contacts
Client Households
Case Records
Groups & Classes
Agency Contracts
Dashboards
Reports
+
Choose an Intake Program
● Client
Next

Program: Financial Opportunity Center

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 1/3/2018 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).

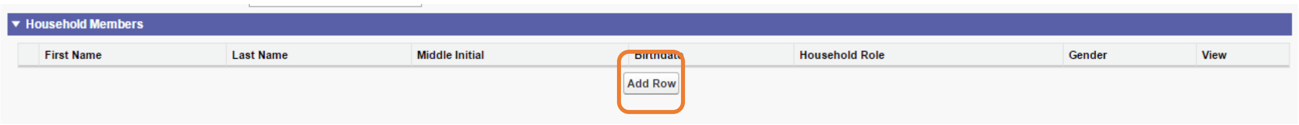


Home Site: Brea

My Recent Items

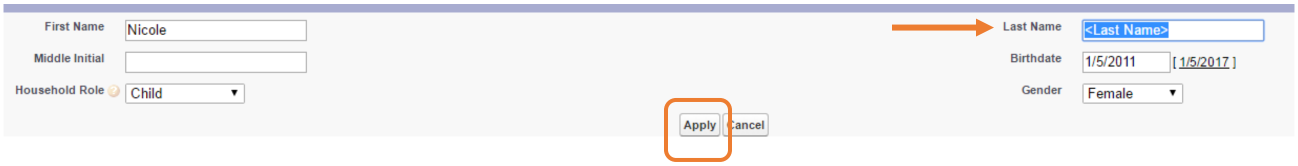
Breakthrough Urban - TEST

   (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.



Household Members

First Name	Last Name	Middle Initial	Birthdate	Household Role	Gender	View



First Name: Nicole

Middle Initial:

Household Role: Child

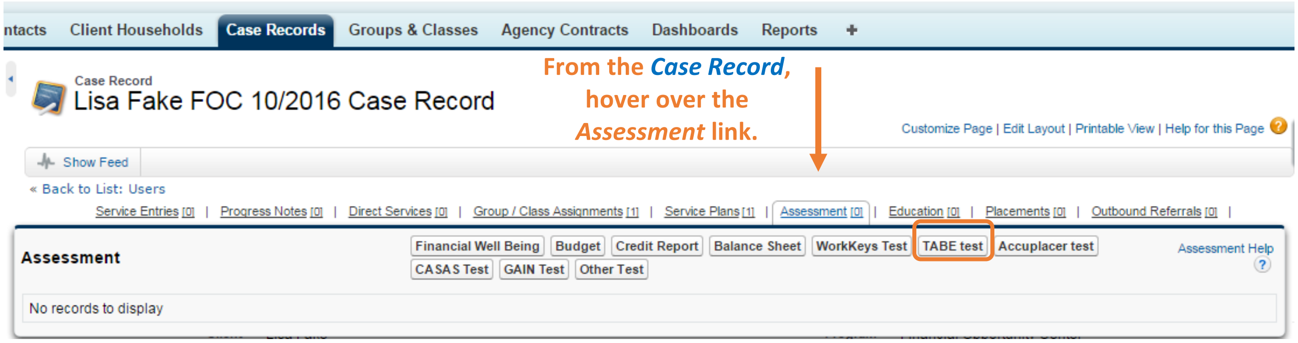
Last Name: <Last Name>

Birthdate: 1/5/2011 [1/5/2017]

Gender: Female

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

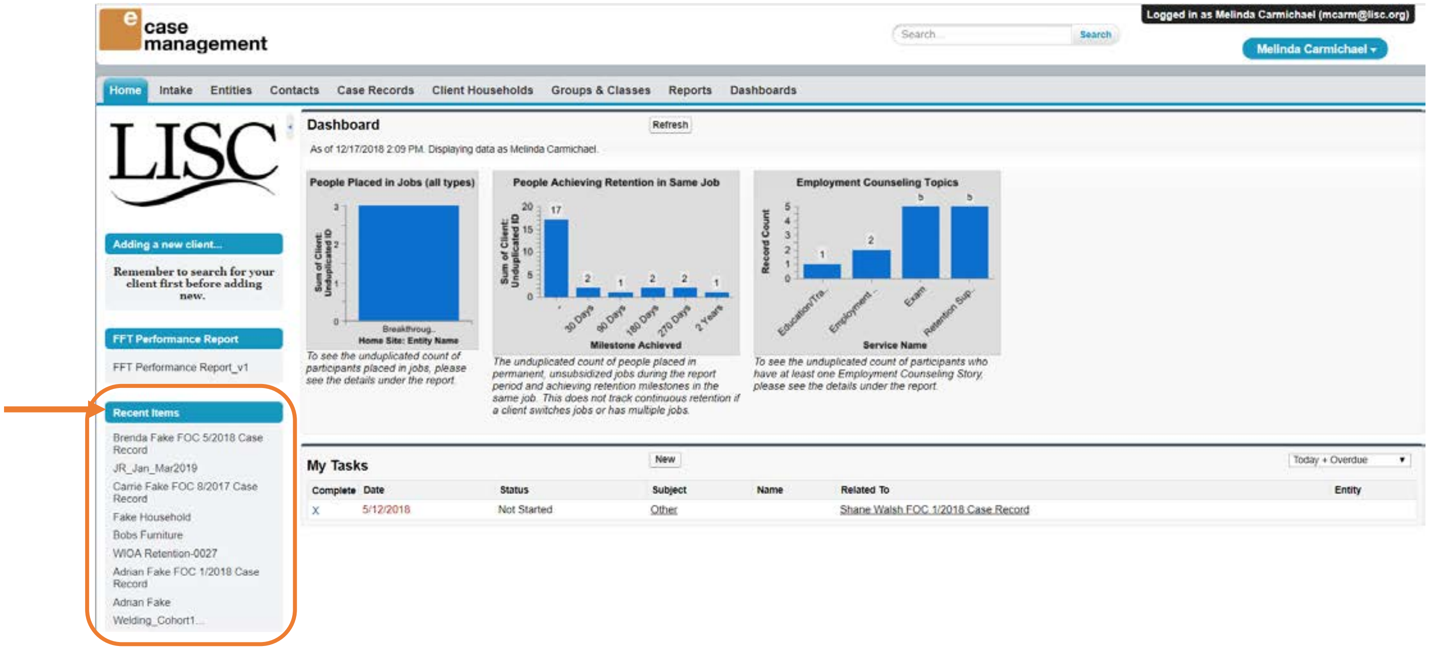
4. A ***Case Record*** is automatically generated for your client, and this will be the place to enter all your client’s services. (Your client’s household is also automatically generated). From this page, you will enter your client’s current employment and education information.
   a. Click on the EDIT 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 1/1/18 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.


ntacts
Client Households
Case Records
Groups & Classes
Agency Contracts
Dashboards
Reports
Case Record
Lisa Fake FOC 10/2016 Case Record
Customize Page | Edit Layout | Printable View | Help for this Page
Show Feed
« Back to List: Users
Service Entries [0] | Progress Notes [0] | Direct Services [0] | Group / Class Assignments [1] | Service Plans [1] | Assessment [0] | Education [0] | Placements [0] | Outbound Referrals [0] |
Assessment
Financial Well Being
Budget
Credit Report
Balance Sheet
WorkKeys Test
TABE test
Accuplacer test
CASAS Test
GAIN Test
Other Test
Assessment Help

No records to display

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

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.)


case management
Search...
Search
Logged in as Melinda Carmichael (mcarm@lisc.org)
Melinda Carmichael
Home
Intake
Entities
Contacts
Case Records
Client Households
Groups & Classes
Reports
Dashboards
LISC
Adding a new client...
FFT Performance Report
FFT Performance Report_v1
Recent Items
Brenda Fake FOC 5/2018 Case Record
JR_Jan_Mar2019
Carrie Fake FOC 8/2017 Case Record
Fake Household
Bobs Furniture
WIOA Retention-0027
Adrian Fake FOC 1/2018 Case Record
Adrian Fake
Welding_Cohort1...
Dashboard
Refresh
People Placed in Jobs (all types)
Sum of Client: Unduplicated ID
3
2
1
0
Breakthroug...
Home Site: Entity Name
People Achieving Retention in Same Job
Sum of Client: Unduplicated ID
20
15
10
5
0
17
2
1
2
2
1
30 Days
90 Days
180 Days
270 Days
2 Years
Milestone Achieved
Employment Counseling Topics
Record Count
5
4
3
2
1
0
1
2
5
5
Education/Tra...
Employment...
Exam
Retention Sup...
Service Name
My Tasks
New
Today + Overdue

Remember to search for your client first before adding new.

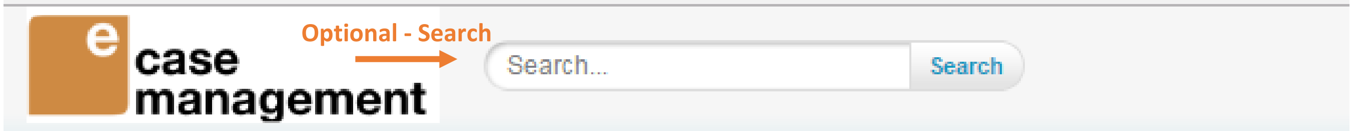
As of 12/17/2018 2:09 PM. Displaying data as Melinda Carmichael.

To see the unduplicated count of participants placed in jobs, please see the details under the report.

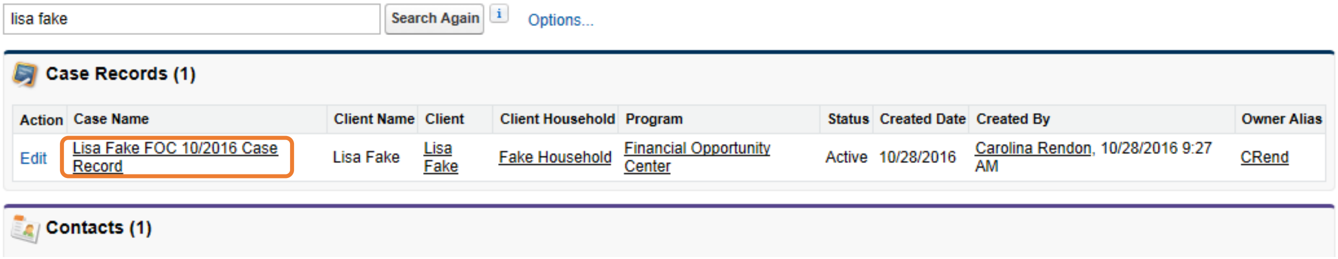
The unduplicated count of people placed in permanent, unsubsidized jobs during the report period and achieving retention milestones in the same job. This does not track continuous retention if a client switches jobs or has multiple jobs.

To see the unduplicated count of participants who have at least one Employment Counseling Story, please see the details under the report.

Complete	Date	Status	Subject	Name	Related To	Entity
X	5/12/2018	Not Started	Other		Shane Walsh FOC 1/2018 Case Record	


case management
Search...
Search

Optional - Search


lisa fake
Search Again
Options...

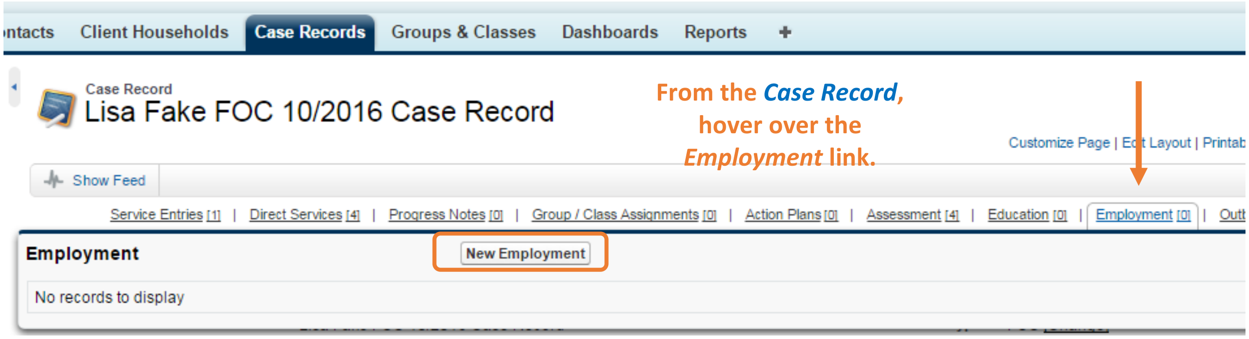
Case Records (1)

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

Contacts (1)

Hover over the Placements 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 10/16/16 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.

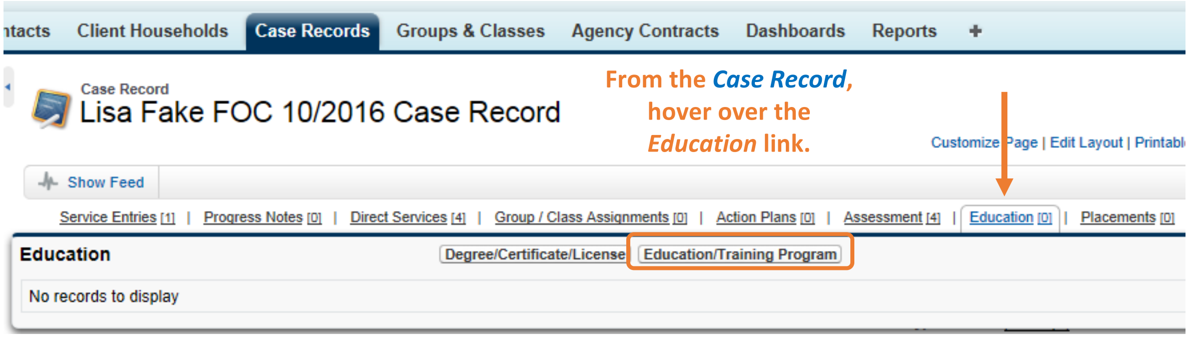

ntacts
Client Households
Case Records
Groups & Classes
Dashboards
Reports
Case Record
Lisa Fake FOC 10/2016 Case Record
Customize Page | Edit Layout | Printab
Show Feed
Service Entries [1] | Direct Services [4] | Progress Notes [0] | Group / Class Assignments [0] | Action Plans [0] | Assessment [4] | Education [0] | Employment [0] | Outt
Employment
New Employment
No records to display

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

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 8/26/17. 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.


ntacts
Client Households
Case Records
Groups & Classes
Agency Contracts
Dashboards
Reports
Case Record
Lisa Fake FOC 10/2016 Case Record
Customize Page | Edit Layout | Printabl
Show Feed
Service Entries [1] | Progress Notes [0] | Direct Services [4] | Group / Class Assignments [0] | Action Plans [0] | Assessment [4] | Education [0] | Placements [0]
Education
Degree/Certificate/License
Education/Training Program
No records to display

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

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