Revised on: 02/14/2018

FFT Salesforce Training Guide for Project Reinvest

Summary:
This is a step by step guide of how you will use FFT Salesforce to track client outcomes for the Project Reinvest grant. The purpose of this document is to help walk you through how to input the required financial counseling data. If you are unsure of how to do something in this guide, please make a note and submit your feedback to fftfocsupport@lisc.org or bring your questions to support hours- (every Monday at 1pm CST), call in information can be found on our website: http://www.foc-network.org/upcoming-webinars.html .

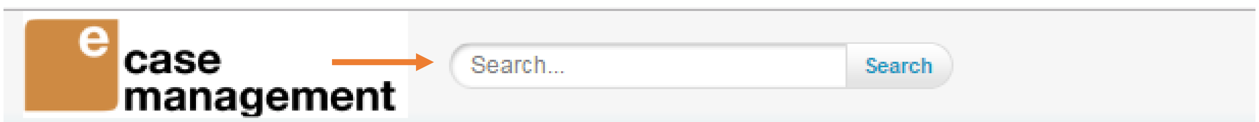
Salesforce Login information:

Website: https://lisc.force.com/partners/login | Click on Login in the upper right corner

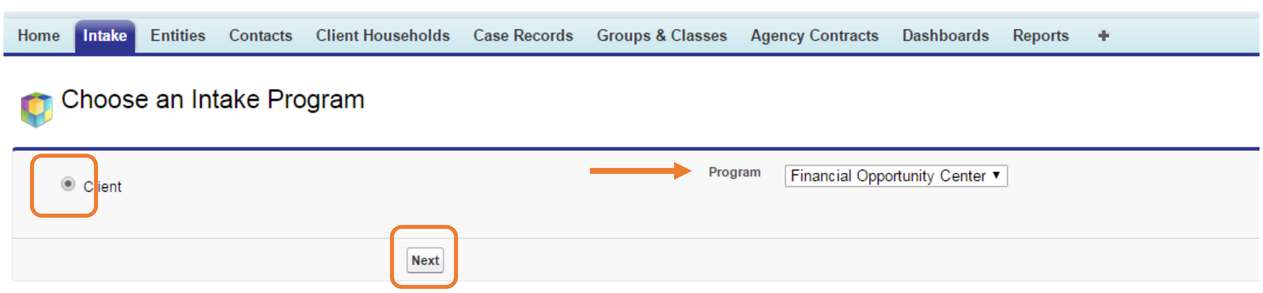
Tier 1A

INTAKE:

1. First begin by searching for your client in the database to avoid creating duplicates.

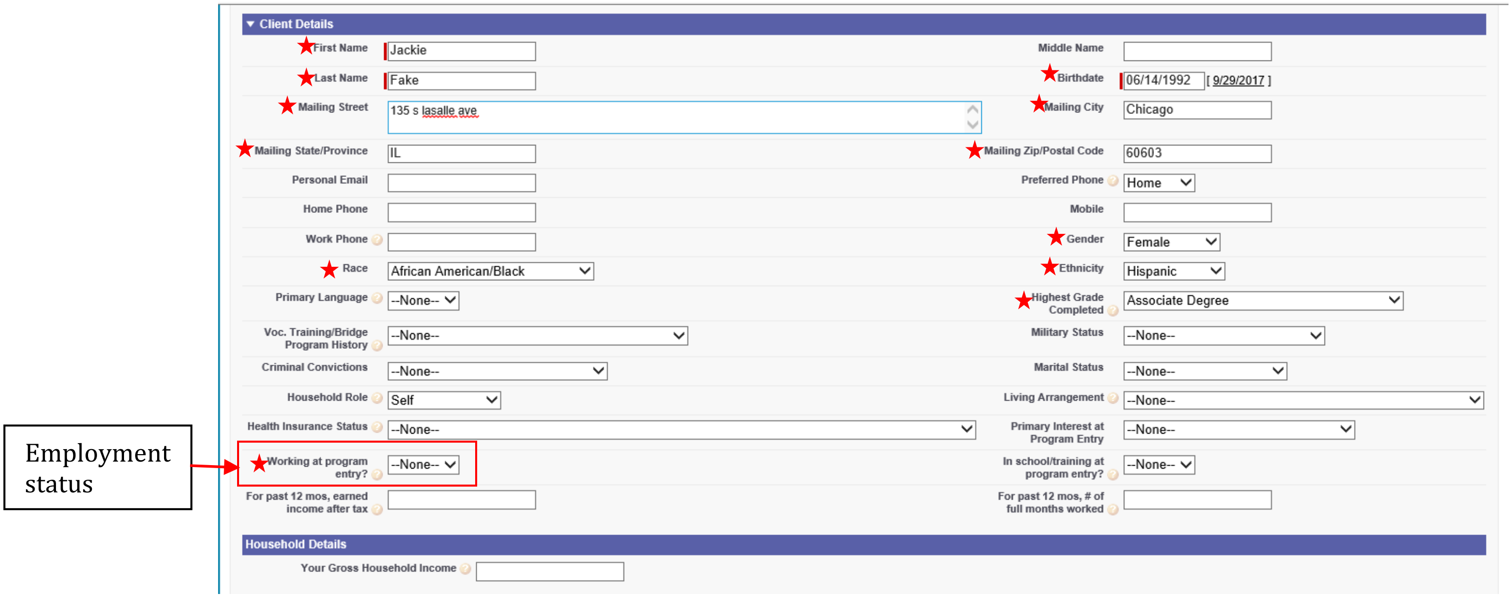


2. Once you have verified your client is not in the database, proceed to add your client by clicking on the "Intake" tab (make sure to select *Financial Opportunity Center* as the *Program* for enrollment). Click on NEXT.

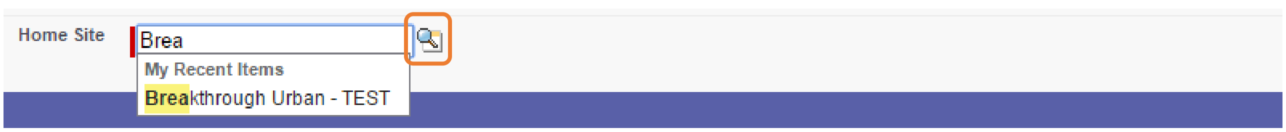


3. You will be directed to the Intake form.

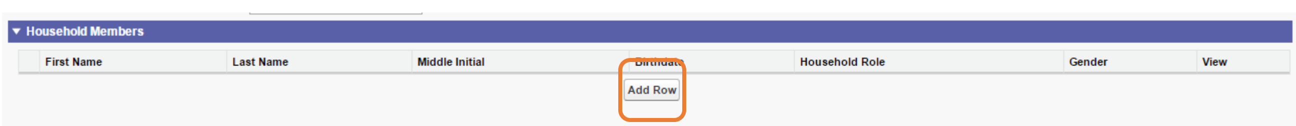
   (1) Complete your client's demographics fields and select the options to indicate your client's current employment status. All ★ Required! NOTE: For "working at program entry?" please select an option other than "Yes" or "No"



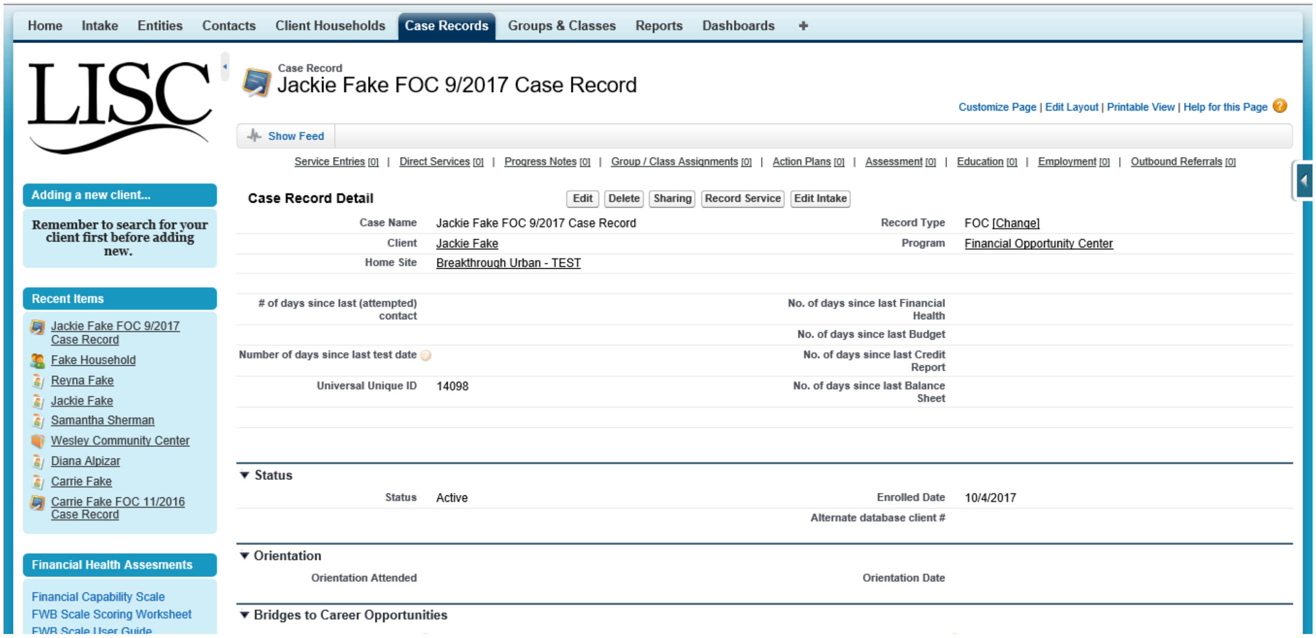
(2) Enter the enrolled date and type the name of your agency as the *Home Site.* (If the system does not automatically generate the name, then click on the magnifying glass next to the field and select your site on the next screen).



(3) Lastly, add 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.

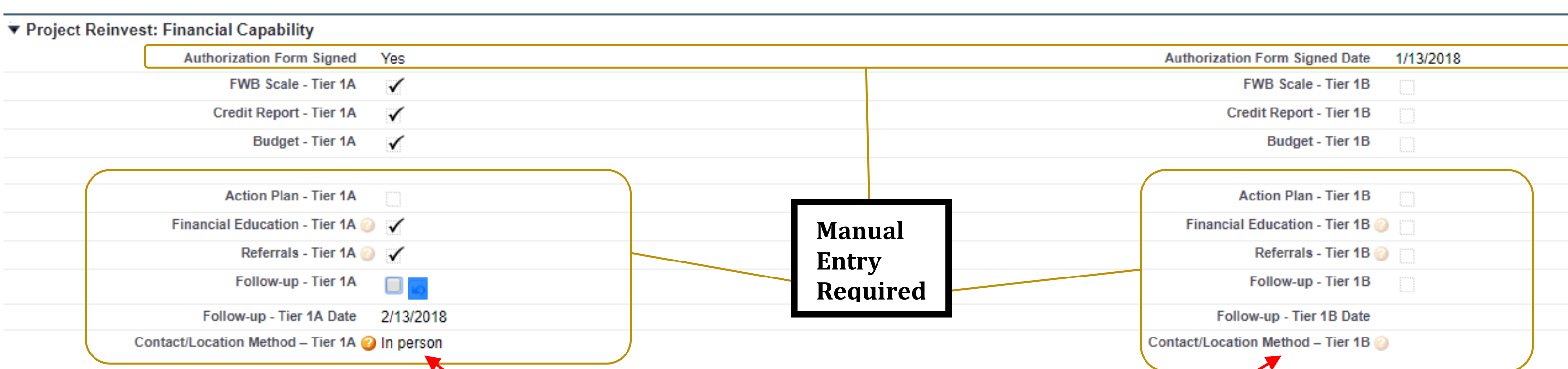


(4) Once completed, click on the SAVE button to add your new client. A ***Case Record*** is automatically generated for your client, and this will be the place to enter all your client's services. (Example below)



If you scroll to the middle of the ***case record*** you will find a section for Project Reinvest. The First 3 rows (FWB scale, Credit report, and budget) will automatically check off once those assessments are completed and recorded in the system. The bottom 4 rows (Action Plan, Financial Education, Referrals, and follow up) must be check off manually once completed. You must also manually Authorization date, Follow up date and Contact Method.

In order to do this, you will hover over the row and double click on the pencil, then click on the box(es) to check it off then scroll to the top or bottom of the screen to click SAVE.

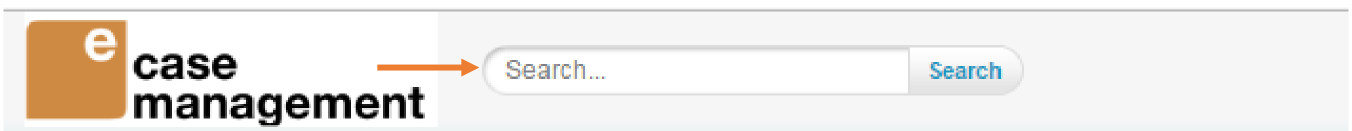


Note: "Contact/Location Method" is for the counseling session NOT the follow up. Enter this after your first session with client.

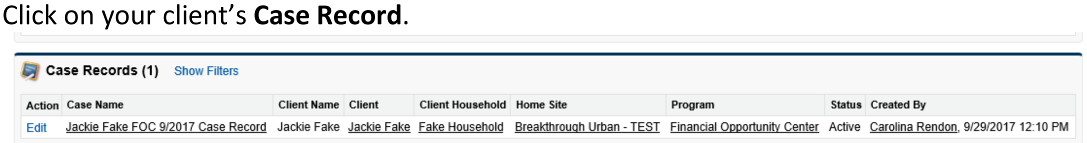
Financial Capabilities:

Service	Tier 1A Session	Tier 1B Session*
Intake	Required	N/A; completed in Tier 1A
Assessment	Required	N/A; completed in tier 1A
Financial Well-being measurement (CFPB scale)	Required	Required
Credit Report (Review and Discuss)	Required	Pull/review subsequent credit report required if client set goal of working on credit in tier 1A session
Budget	Required	Required (updated budget)
Action plan	Required	Required (updated action plan)
Financial education	Required	Optional
Referrals	As needed by clients	As needed by client
Follow-up	Required	Required

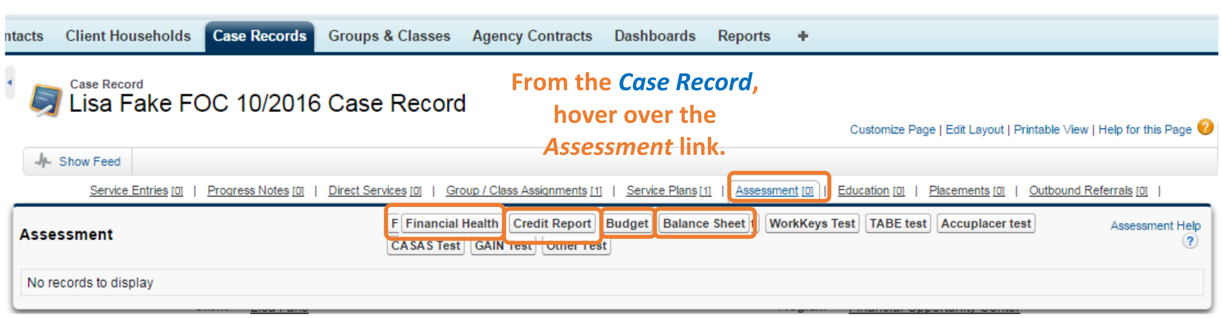
Start inputting assessments…



1. Search for your client's name.
2. Click on your client's **Case Record**.



3. Hover over the *Assessment* link and you will see each of the financial assessment buttons (which takes the place of the Combined Financial Assessment (CFA).



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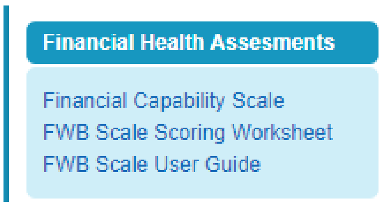
Financial Health:

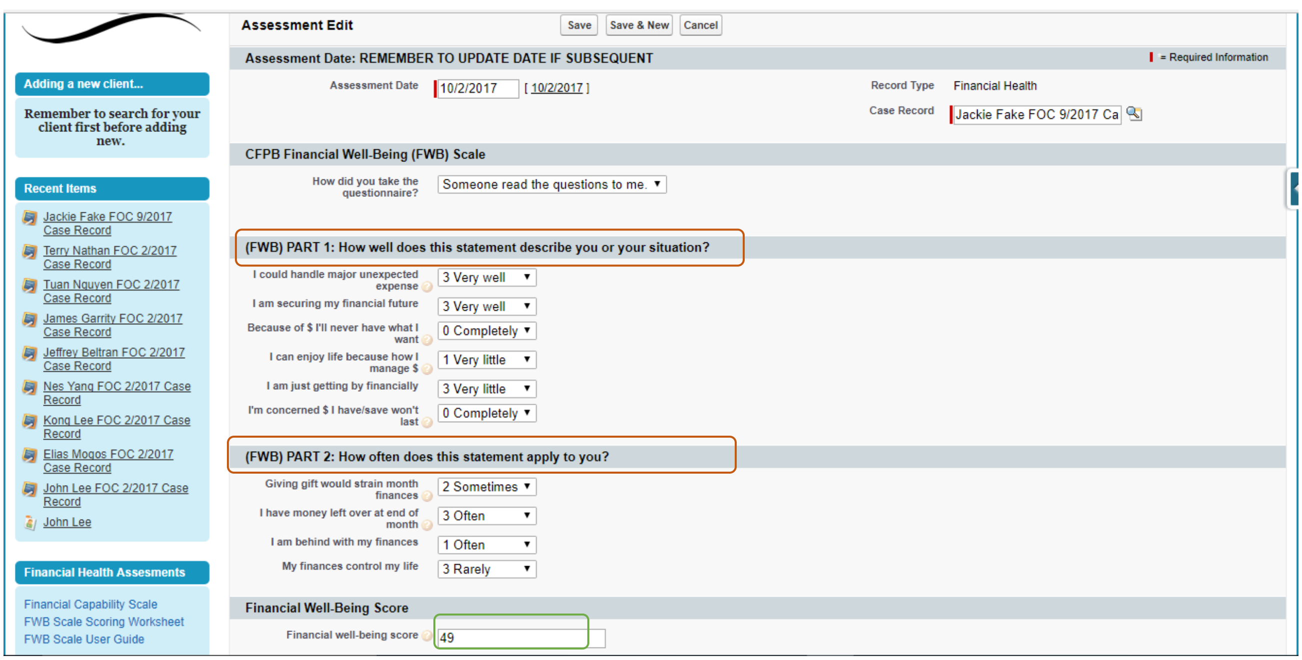
1) After searching for your client's case record; hover over the *Assessment* link and click on financial health.
2) Enter assessment date and complete FWB Part 1 and 2 (required) as well as financial well-being score*.
3) Complete Banking information; and **SAVE**

* It is recommended that you calculate the financial well-being score before you begin entering data. See the worksheet below.

CFPB Financial Well- being Scale scoring worksheet- http://files.consumerfinance.gov/f/201512_cfpb_financial-well-being-worksheet-standard.pdf

A link can also be found on the left hand side of any case record under financial health assessments.





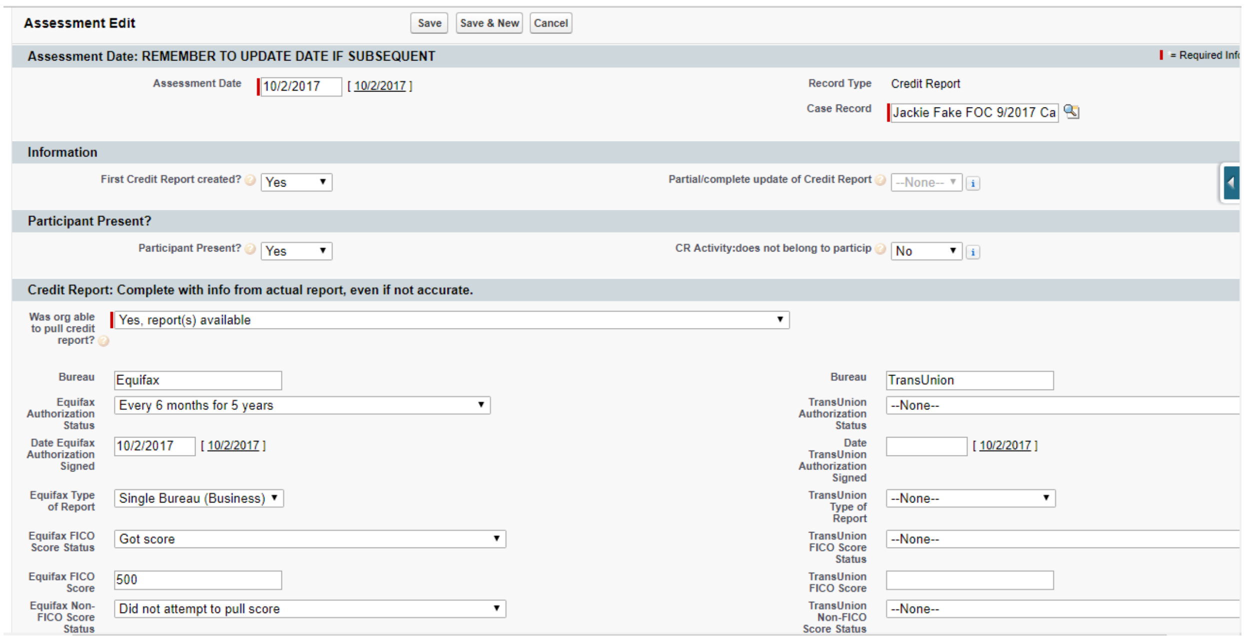
After you save, if you navigate back to your client's case record and scroll down to project reinvest, you will notice FWB scale checked off.

Credit Report:

1) After searching for your client's case record; hover over the *Assessment* link and click on credit report.
2) Enter assessment date; "First Credit Report?"… Etc. as applicable. (ie. Enter data under the specific credit bureau you pulled the credit report from)

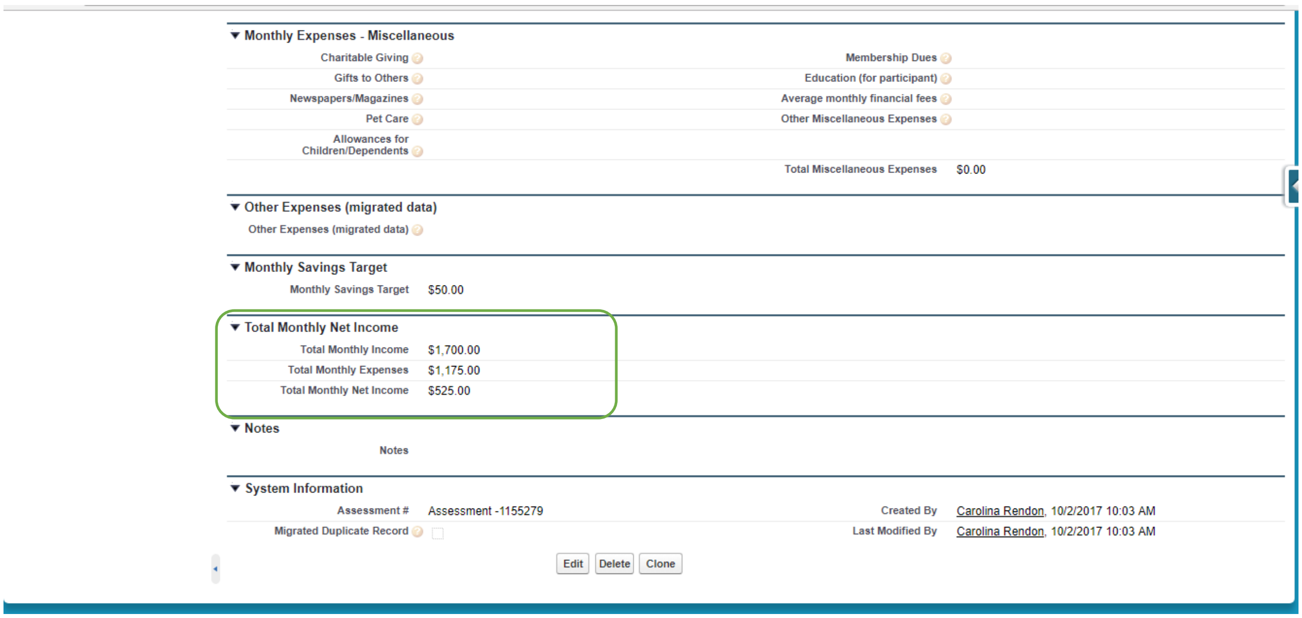
Important note! Please document if you have received signed authorization to pull credit report and keep in client's files.

3) Once completed click **SAVE;** again if you navigate back to your client's case record you will see "credit report" checked off.



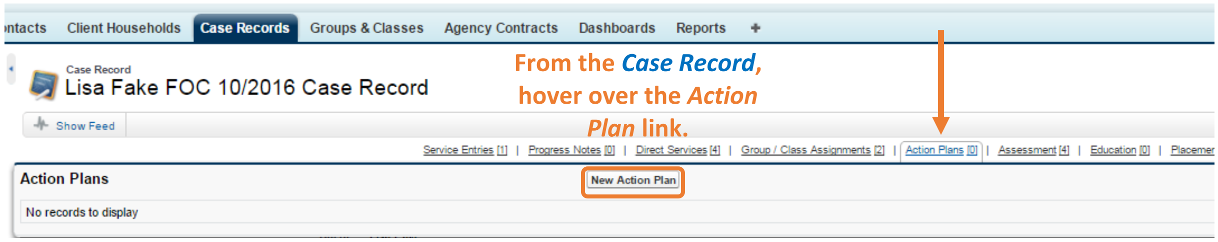
Budget:

1) After searching for your client's case record; hover over the *Assessment* link and click on Budget.
2) Enter assessment date and all field applicable to your client's budget.
3) When you click save you will be sent to the below screen where you can find your client's Total monthly net income.
4) Once completed click **SAVE;** again if you navigate back to your client's case record you will see "Budget" checked off.

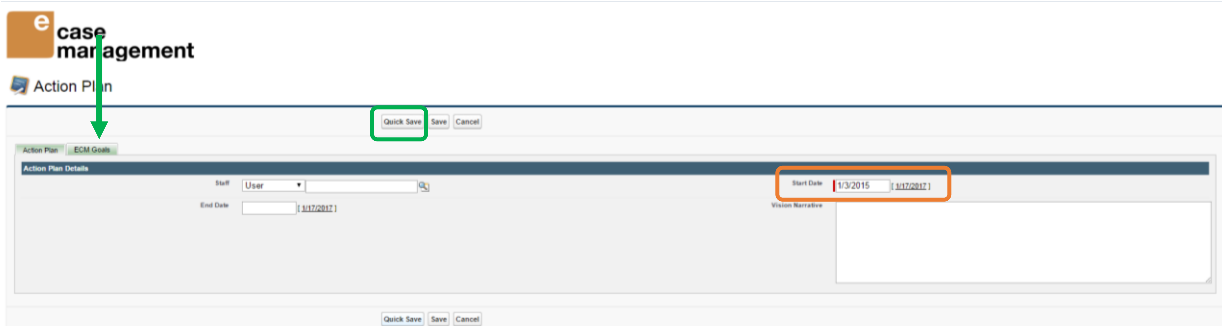


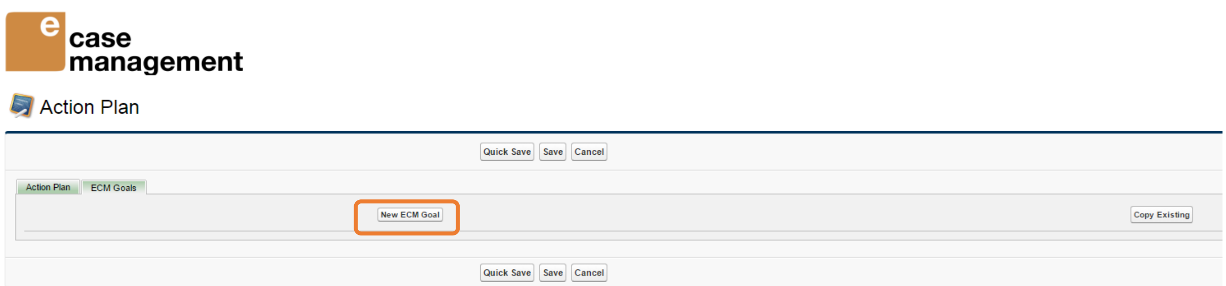
Action Plan:

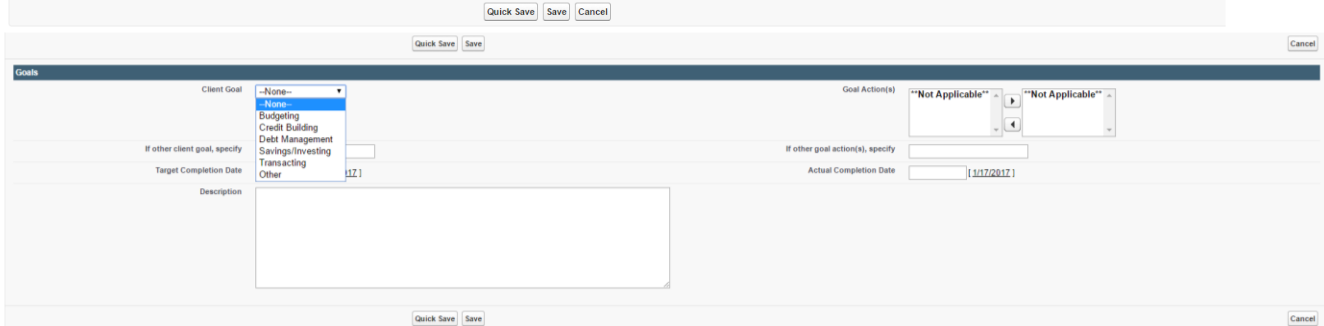
1) Search for your client's **Case Record**. Hover over the *Action Plans* link and click on the New Action Plan button.



2) Enter the *Start Date*, and write in a *Vision Narrative* (this used to be the Big Vision). Click on the QUICK SAVE button.
3) Click on the **ECM Goals tab**. Click on the New ECM Goal button*. Choose a *Client Goal* and at least one *Goal Action*.



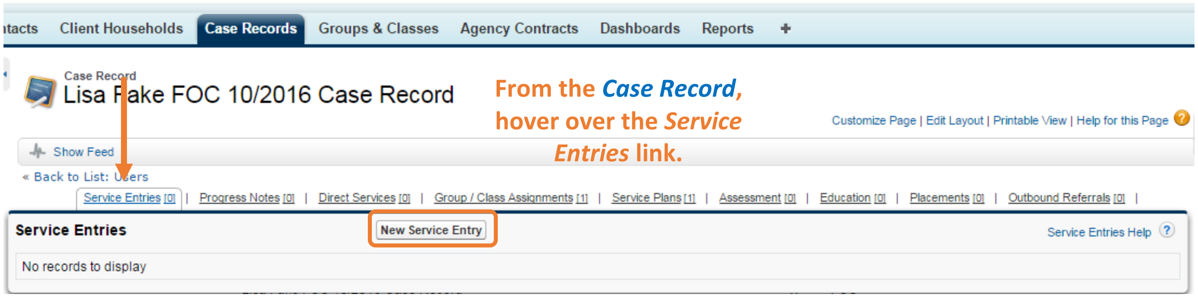




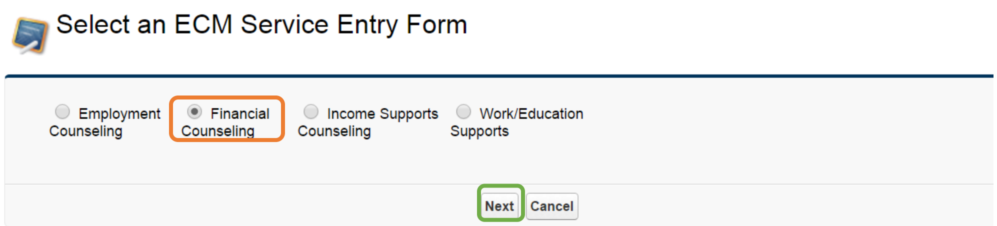
4) Fill in the *Target Completion Date*. Click on the **SAVE** button. *You may create as many ECM Goals as you wish.
5) After you click save you must navigate back to your client's case record and **Manually** Check off "Action Plan". (Instructions on page 3)

Financial Education:

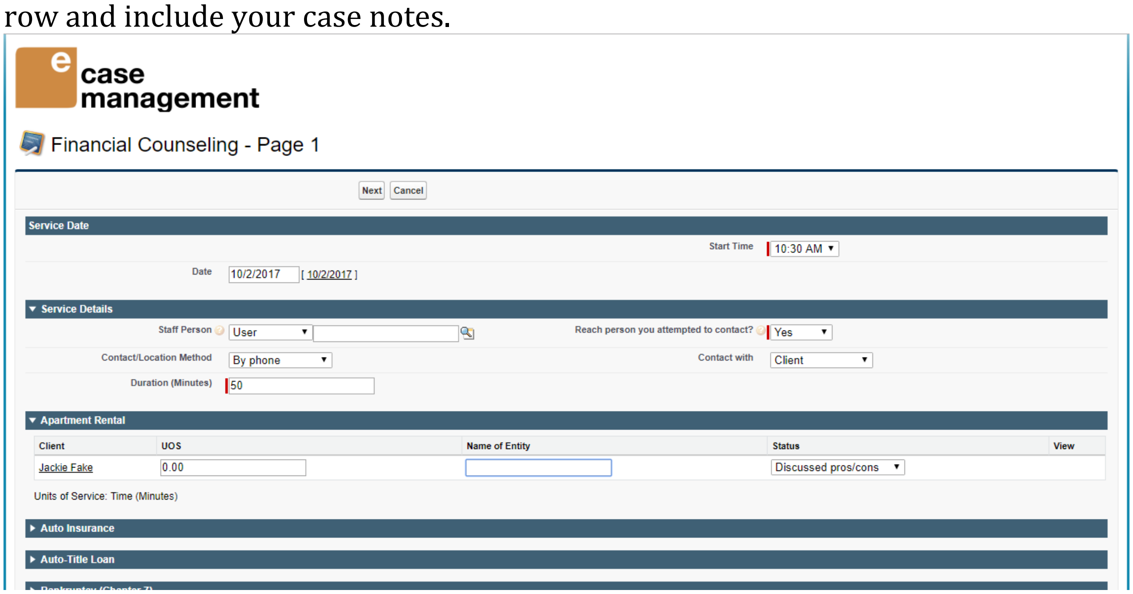
1) Search for your client's **Case Record**. Hover over the *Service Entries* link and click on the New Service Entry button. Click on Financial Counseling and click on the NEXT button.



2) Select the type of service entry (ie. Financial Counseling); **Next**



3) Choose a story and status for each goal; total of 3 pages. On the last page you can click Add row and include your case notes.

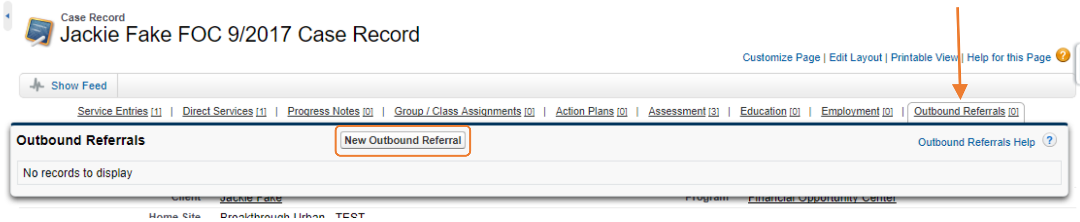


4) After you click save you must navigate back to your client's case record and **Manually** Check off "Financial Education". (Instructions on page 3)

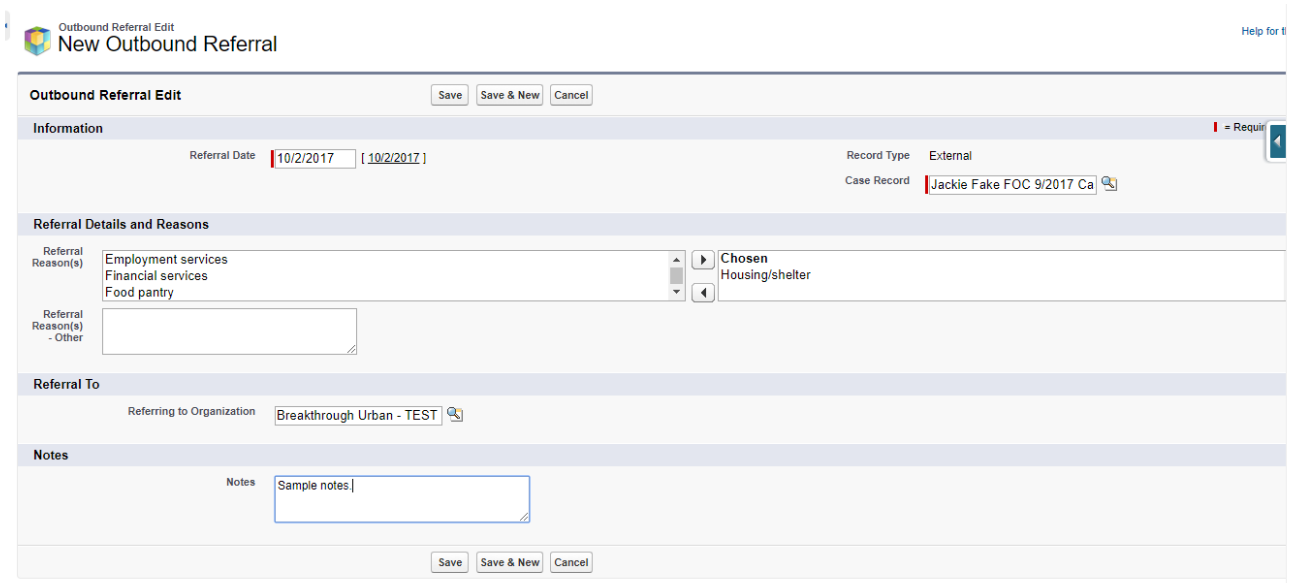
Referrals:

Referrals are as needed by client.

1) Search for your client's **Case Record**. Hover over the *Outbound Referrals* link and click on the new outbound referral button.



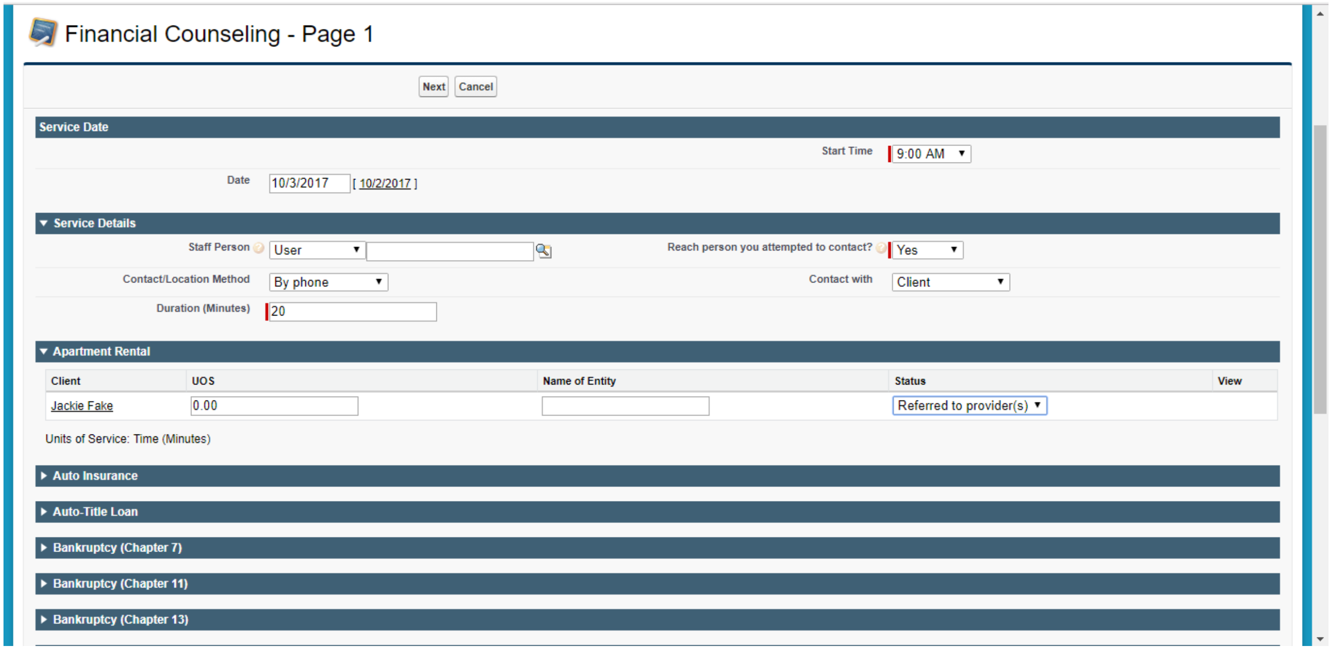
2) Enter referral date and select the reason for referral and click the around buttom to move it into the "chosen" box.
3) Select the organization that you are referring you client to.
4) Include any case notes you see fit.



5) After you click save you must navigate back to your client's case record and **Manually** Check off "Referral". (Instructions on page 3)

Follow-up:

1) Search your client's case record. Hover over service entry, and click on new service entry
2) Enter assessment date, method of contact etc. ; navigate to previous story and include update to the goal (if applicable), new case note or enter new story.
3) After you click save you must navigate back to your client's case record and **Manually** Check off "Follow up" and add the Follow up date. (Instructions on page 3)



Financial Counseling - Page 1

Next Cancel

Service Date

Start Time: 9:00 AM

Date: 10/3/2017 [10/2/2017]

Service Details

Staff Person: User

Reach person you attempted to contact? Yes

Contact/Location Method: By phone

Contact with: Client

Duration (Minutes): 20

Apartment Rental

Client	UOS	Name of Entity	Status	View
Jackie Fake	0.00		Referred to provider(s)	

Units of Service: Time (Minutes)

Auto Insurance

Auto-Title Loan

Bankruptcy (Chapter 7)

Bankruptcy (Chapter 11)

Bankruptcy (Chapter 13)

Tier 1B

FINANCIAL CAPABILITIES:

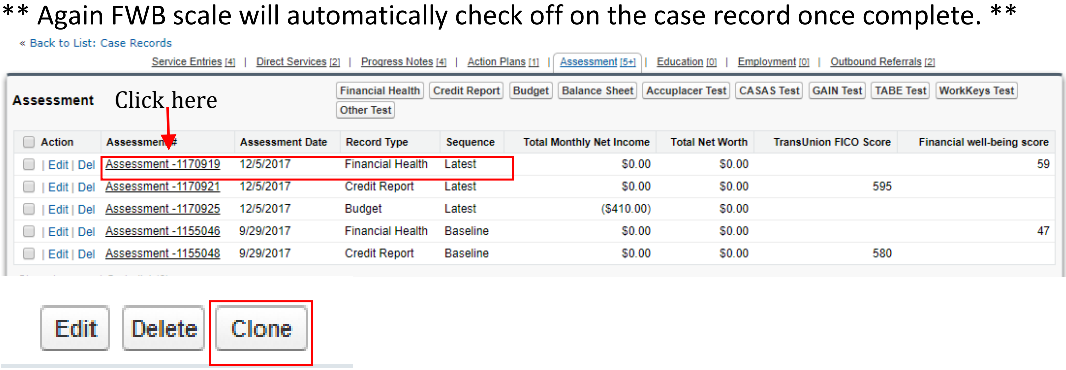
SERVICE	TIER 1A SESSION	TIER 1B SESSION*
INTAKE	REQUIRED	N/A; COMPLETED IN TIER 1A
ASSESSMENT	REQUIRED	N/A; COMPLETED IN TIER 1A
FINANCIAL WELL-BEING MEASUREMENT (CFPB SCALE)	REQUIRED	REQUIRED
CREDIT REPORT (REVIEW AND DISCUSS)	REQUIRED	PULL/REVIEW SUBSEQUENT CREDIT REPORT REQUIRED ONLY IF CLIENT SET GOAL OF WORKING ON CREDIT IN TIER 1A SESSION
BUDGET	REQUIRED	REQUIRED (UPDATED BUDGET)
ACTION PLAN	REQUIRED	REQUIRED (UPDATED ACTION PLAN)
FINANCIAL EDUCATION	REQUIRED	OPTIONAL
REFERRALS	AS NEEDED BY CLIENTS	AS NEEDED BY CLIENT
FOLLOW-UP	REQUIRED	REQUIRED

Above you will see the requirements for Tier 1B as compared to Tier 1A. Note that a client cannot start a tier 1B session without first completing tier 1A but Tier 1B may start at the time of your tier 1A follow-up. Notice that Intake and Assessment has already been completed in Tier 1A. For tier 1B you are then required to provide and updated FWB scale, updated budget, updated action plan and follow up.

Financial education is optional and Credit report/ referrals are as needed by client.

Financial Well- Being (update required):

1. Navigate to your client's case record
2. Hover over *assessments* and click on the most recent financial health assessment link. (If there is only one assessment it will be the "baseline" if there are multiple clicked on "latest"
3. Once open; click on clone and enter the new assessment data.
   ** Again FWB scale will automatically check off on the case record once complete. **



Credit Report (As needed by Client):

Credit report pulls will only be required if your clients goal from tier 1a was to work on their credit.

1. Navigate to your client's case record
2. Hover over *assessments* and click on the most recent credit report assessment link. (If there is only one assessment it will be the "baseline" if there are multiple clicked on "latest"
3. Once open; click on clone and enter the new assessment data.

** Credit report will automatically check off on the case record once complete. **

Budget (update required):

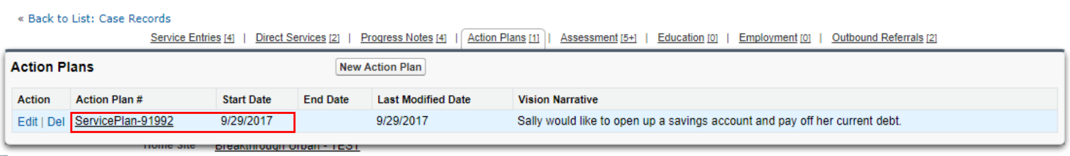
1. Navigate to your client's case record
2. Hover over *assessments* and click on the most recent budget assessment link. (If there is only one assessment it will be the "baseline" if there are multiple clicked on "latest"
3. Once open; click on clone and enter the new assessment data.

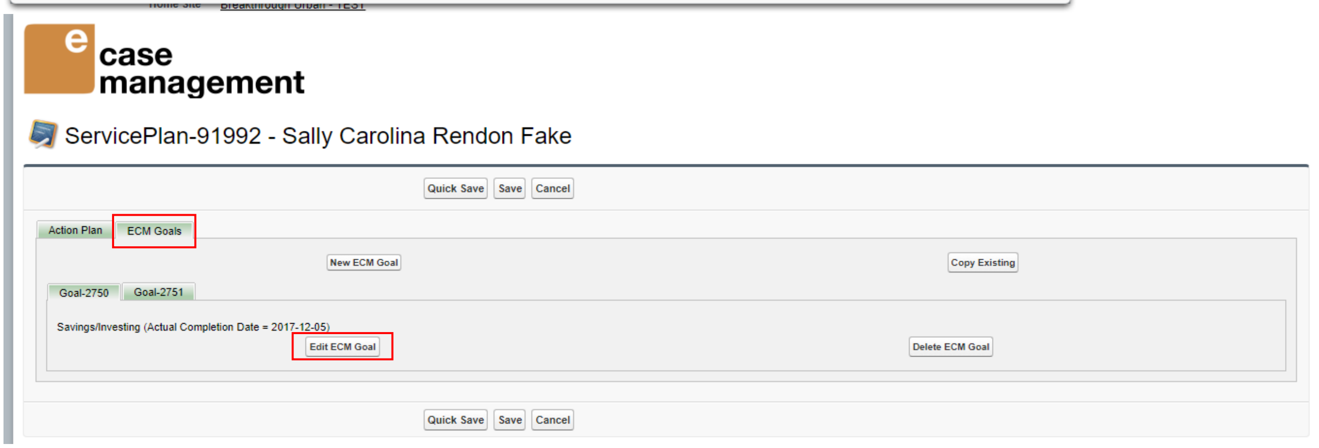
** The budget will automatically check off on the case record once complete. **

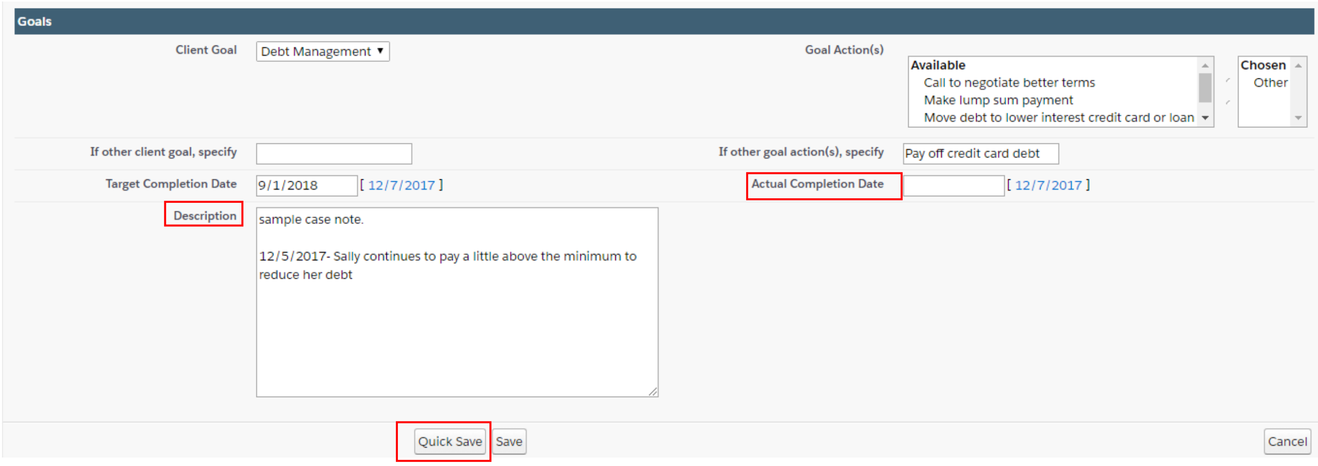
Action Plan (update required):

1. Navigate to your client's case record
2. Hover over *Action Plans* and click on the action plan that was created in tier 1A.
3. Once open; Click on ECM goal and choose a goal to edit/update. Make sure not to delete any previous case note but instead add to it by including a date. If goal has been met include completion date. QUICK SAVE once complete.

** The action plan will NOT automatically check off on the case record; See instructions on page 3. **







Financial Education (Optional)

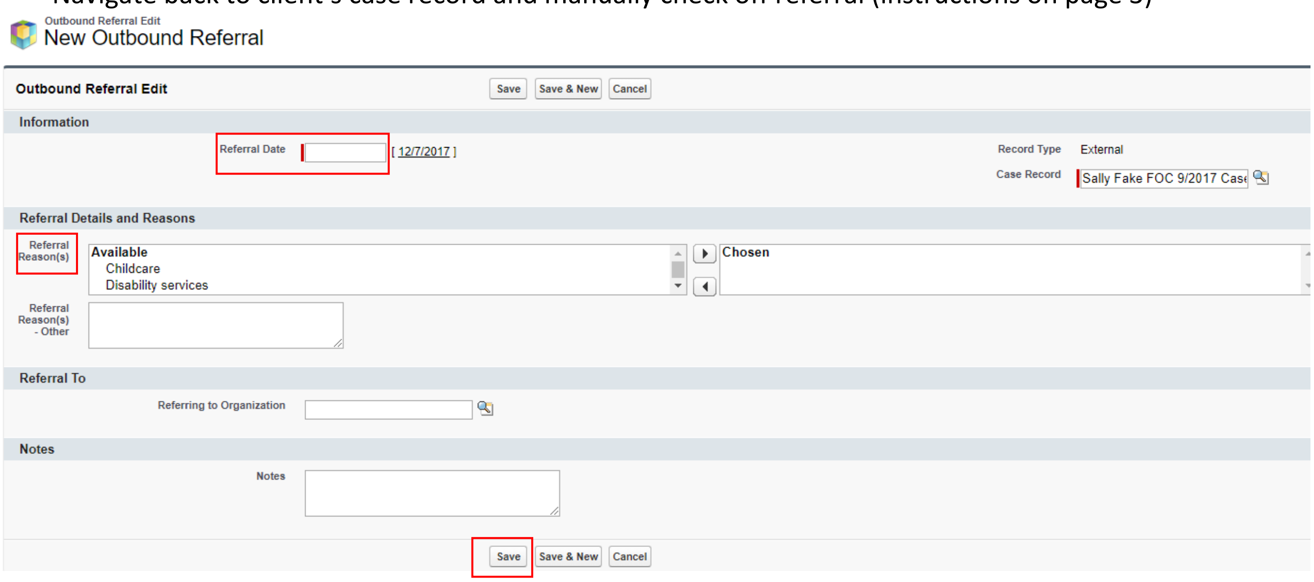
1. Navigate to your client's case record.
2. Hover over *Services Entries* and click new service entry
3. Click on Financial Counseling
4. Then you can either update a previous goal story and/or create a new story ; SAVE

*** Navigate back to client's case record and manually check off referral (instructions on page 3)***

Referrals

1. Navigate to your client's case record
2. Hover over *Outbound referrals* and click on "New Outbound Referral"
3. Enter reason for referral and referring entity; SAVE

   *** Navigate back to client's case record and manually check off referral (instructions on page 3) ***



Follow- up

1. Navigate to your client's case record
2. Hover over *Service Entries* and click new service entry
3. Then you can either update a previous goal story and/or create a new story
4. OR just add a note on the last page that you followed up with the client. SAVE

*** Navigate back to client's case record and manually check off follow up and add follow up date (instructions on page 3) ***