

# 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 <a href="mailto:fftfocsupport@lisc.org">fftfocsupport@lisc.org</a> or bring your questions to support hours- (every Monday at 1pm CST), call in information can be found on our website: <a href="http://www.foc-network.org/upcoming-webinars.html">http://www.foc-network.org/upcoming-webinars.html</a>.

## Salesforce Login information:

Website: <u>https://lisc.force.com/partners/login</u> | 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.

A		
case	Search	Search
management		

 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.

Home	Intake	Entities	Contacts	Client Households	Case Records	Groups & Clas	ses Ag	ency Contracts	Dashboards	Reports	+	
Choose an Intake Program												
(	Cient						Program	Financial Oppo	ortunity Center 🔻			
				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"



	▼ Client Details			
	First Name	Jackie	Middle Name	
	★Last Name	Fake	Birthdate	06/14/1992 [ <u>9/29/2017</u> ]
	★ Mailing Street	135 s lasalle ave	Mailing City	Chicago
	Mailing State/Province		Mailing Zip/Postal Code	60603
	Personal Email		Preferred Phone	Home V
	Home Phone		Mobile	
	Work Phone 🤅		Gender	Female V
	🛨 Race	African American/Black	Ethnicity	Hispanic V
	Primary Language	None V	Highest Grade Completed	Associate Degree
	Voc. Training/Bridge Program History	None V	Military Status	None V
	Criminal Convictions	None V	Marital Status	None 🗸
	Household Role 🤅	Self	Living Arrangement	2None V
	Health Insurance Status 🤅	-None	Primary Interest at Program Entry	None V
Employment	► ★Working at program entry? @	None V	In school/training at program entry?	None V
Status	For past 12 mos, earned income after tax 🤅		For past 12 mos, # of full months worked	
	Household Details			
	Your Gross Ho	isehold income 🥥		

(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).

Home Site	Brea	
	My Recent Items	
	Breakthrough Urban - TEST	

(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.

▼ He	ousehold Members						
	First Name	Last Name	Middle Initial	Dirtinuati	Household Role	Gender	View
				Add Row			

(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)



Home Intake Entities Co	ontacts Client Households Cas	e Records Groups & Classes Reports Dashboards +	
LISC	Jackie Fake FO	C 9/2017 Case Record	Customize Page   Edit Layout   Printable View   Help for this Page 🥝
	Show Feed	Services (0)   Progress Notes (0)   Group / Class Assignments (0)   Action Plans (0)   Assessment (0)	Education [0]   Employment [0]   Outbound Referrals [0]
Adding a new client	Case Record Detail	Edit Delete Sharing Record Service Edit Intake	
Remember to search for your	Case Name	Jackie Fake FOC 9/2017 Case Record Record Type	FOC [Change]
new.	Client	Jackie Fake Program	Financial Opportunity Center
	Home Site	Breakthrough Urban - TEST	
Recent Items	# of days since last (attempted) contact	No. of days since last Financial Health	
Jackie Fake FOC 9/2017		No. of days since last Budget	
Eake Household	Number of days since last test date 🥃	No. of days since last Credit Report	
<ul> <li><u>Reyna Fake</u></li> <li><u>Jackie Fake</u></li> </ul>	Universal Unique ID	14098 No. of days since last Balance Sheet	
¿ Samantha Sherman Wesley Community Center			
<u>Diana Alpizar</u> <u>Alpizar</u>	▼ Status		
Carrie Fake FOC 11/2016	Status	Active Enrolled Date	10/4/2017
Case Record		Alternate database client #	
Financial Health Assesments	▼ Orientation Orientation Attended	Orientation Date	
FWB Scale Scoring Worksheet	▼ Bridges to Career Opportunit	ies	

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.

▼ Project Reinvest: Financial Capability		
Authorization Form Signed Yes		Authorization Form Signed Date 1/13/2018
FWB Scale - Tier 1A		FWB Scale - Tier 1B
Credit Report - Tier 1A		Credit Report - Tier 1B
Budget - Tier 1A 🖌		Budget - Tier 1B
Action Plan - Tier 1A		Action Plan - Tier 1B
Financial Education - Tier 1A 🥹 🏹	Manual	Financial Education - Tier 1B 🔕
Referrals - Tier 1A 🥝 🏹	Entry	Referrals - Tier 1B 🍘 📺
Follow-up - Tier 1A	Required	Follow-up - Tier 1B
Follow-up - Tier 1A Date 2/13/2018		Follow-up - Tier 1B Date
Contact/Location Method – Tier 1A 🥝 In person		Contact/Location Method – Tier 1B 📀

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*
ΙΝΤΑΚΕ	REQUIRED	N/A; COMPLETED IN TIER 1A
Assessment	Required	N/A; COMPLETED IN TIER 1A
FINANCIAL WELL-BEING	REQUIRED	REQUIRED
MEASUREMENT (CFPB SCALE)		
Credit Report (Review and	Required	Pull/review subsequent credit report required
Discuss)		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	AS NEEDED BY CLIENT
	CLIENTS	
Follow-up	REQUIRED	REQUIRED

## START INPUTTING ASSESSMENTS...

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

Show Filters								
Action	Case Name	Client Name	Client	<b>Client Household</b>	Home Site	Program	Status	Created By
Edit	Jackie Fake FOC 9/2017 Case Record	Jackie Fake	Jackie Fake	Fake Household	Breakthrough Urban - TEST	Financial Opportunity Center	Active	Carolina Rendon, 9/29/2017 12:10 PM

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).

ntacts	Client Households	Case Records	Groups & Classes	Agency Contracts	Dashboards	Reports	+	
·	Case Record	DC 10/2016	Case Record	From the	e Case Re	cord,		
.Jp.	Show Feed			Asses	sment lin	k		Customize Page   Edit Layout   Printable ∖iew   Help for this Page 🥑
	Service Entries [0]	Progress Notes [0]	Direct Services [0]   Gro	up / Class Assignments [1]	Service Plans	1   Assessm	ent [0]	Education [0]   Placements [0]   Outbound Referrals [0]
Asse	ssment		F Financial H CASAS Test	GAIN Test Other Tes	Budget Balance	Sheet W	orkKeys 1	Test TABE test Accuplacer test Assessment Help
No re	cords to display							



#### **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-worksheetstandard.pdf

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

Financial Health Assesments Financial Capability Scale FWB Scale Scoring Worksheet FWB Scale User Guide

	Assessment Edit Save Save Cancel		
	Assessment Date: REMEMBER TO UPDATE DATE IF SUBSEQUENT	= Required Information	ation
Adding a new client	Assessment Date 10/2/2017 [ 10/2/2017 ]	Record Type Financial Health	
Remember to search for your client first before adding		Case Record Jackie Fake FOC 9/2017 Ca	
new.	CFPB Financial Well-Being (FWB) Scale		
Recent Items	How did you take the questionnaire? Someone read the questions to me.		
Jackie Fake FOC 9/2017 Case Record			
Terry Nathan FOC 2/2017	(FWB) PART 1: How well does this statement describe you or your situation?		
Tuan Nguyen FOC 2/2017	I could handle major unexpected expense 2 3 Very well		
Case Record	I am securing my financial future 3 Very well		
Case Record	Because of \$ I'll never have what I want 2 O Completely		
Jeffrey Beltran FOC 2/2017 Case Record	I can enjoy life because how I manage \$ 0 1 Very little		
Nes Yang FOC 2/2017 Case Record	I am just getting by financially 3 Very little		
Kong Lee FOC 2/2017 Case Record	I'm concerned \$ I have/save won't last		
Elias Mogos FOC 2/2017 Case Record	(FWB) PART 2: How often does this statement apply to you?		
John Lee FOC 2/2017 Case Record	Giving gift would strain month finances 🥥 2 Sometimes 🔻		
🧃 John Lee	I have money left over at end of month 3 Often v		
	I am behind with my finances 1 Often		
Financial Health Assesments	My finances control my life 3 Rarely		
Financial Capability Scale	Financial Well-Being Score		
FWB Scale User Guide	Financial well-being score 🥥 49		

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.

Assessment	Edit	Save Save & New Cancel	]		
Assessment	Date: REMEMBER TO UPDATE DATE IF SUBSEC	UENT			Required Info
	Assessment Date 10/2/2017 [ 10/2/2017	7]	Record Type	Credit Report	
	•		Case Record	Jackie Fake FOC 9/2017 Ca	
Information					
F	irst Credit Report created? 🥝 Yes 🔻		Partial/complete update of Credit Report	None 🔻 🚺	•
Participant P	resent?				
	Participant Present? 🥝 Yes 🔻		CR Activity:does not belong to particip	No 🔻 i	
Credit Report	t: Complete with info from actual report, even if	not accurate.			
Was org able to pull credit report?	Yes, report(s) available		۲		
Bureau	Equifax		Bureau	TransUnion	
Equifax Authorization Status	Every 6 months for 5 years	▼	TransUnion Authorization Status	None	
Date Equifax Authorization Signed	10/2/2017 [10/2/2017]		Date TransUnion Authorization Signed	[ <u>10/2/2017</u> ]	
Equifax Type of Report	Single Bureau (Business) <b>*</b>		TransUnion Type of Report	None	
Equifax FICO Score Status	Got score	Ŧ	TransUnion FICO Score Status	None	
Equifax FICO Score	500		TransUnion FICO Score		
Equifax Non- FICO Score Status	Did not attempt to pull score	¥	TransUnion Non-FICO Score Status	None	



#### **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.

	hiscenarieous			
Charitable	: Giving 🕗		Membership Dues 🌍	
Gifts to	Others 📀		Education (for participant)	
Newspapers/Mag	gazines 📀		Average monthly financial fees 🌍	
P	et Care 🕜		Other Miscellaneous Expenses 🌍	
Allowan Children/Depe	ices for endents 🕜			
			Total Miscellaneous Expenses	\$0.00
▼ Other Expenses (mig	rated data)			
Other Expenses (migrate	:d data) 🕜			
▼ Monthly Savings Targ	get			
Monthly Savings	3 Target \$50.00			
▼ Total Monthly Net Inc	come			
Total Monthly	Income \$1,700.00			
Total Monthly Ex	penses \$1,175.00			
Total Monthly Net	Income \$525.00	J		
▼ Notes				
	Notes			
▼ System Information				
Assess	sment # Assessment -1155279	9	Created By	Carolina Rendon, 10/2/2017 10:03 A/
Minuted Double de	Record @		Last Modified By	Carolina Rendon, 10/2/2017 10:03 AM



## **Action Plan:**

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

ntacts	Client Households	Case Records	Groups & Classes	Agency Contracts	Dashboards	Reports	+					
	Case Record			From	the Case	e Recoi	rd,					
	Lisa Fake FC	DC 10/2016	Case Record	hove	er over th	e Actio	on					
-1-	Show Feed				<i>Plan</i> lin	ık.						
			<u>Se</u>	rvice Entries [1]   Progress	Notes [0]   Direct	Services [4]	Group / (	Class Assignments [2]	Action Plans [0]	Assessment [4]	Education [0]	Placemer
Actio	on Plans				New Action Pla	an						
Nore	ecords to display											

- 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*.

e case mar agement						
💐 Action Pl <mark>a</mark> n						
		Quick Save Save Cancel				
Action Plan ECM Goals Action Plan Details						
Staff	User 🔻	9		Start Date 1/3/2015 [ 1	<u>(17/2017</u> ]	
End Date	[ 1/17/2017 ]			Vision Narrative		
		Guick Save Save Cancel				
e case management						
Action Plan						
		Quick Save Ca	incel			
Action Plan ECM Goals						
		New ECM Goal				Copy Existing
		Quick Save Save Ca	incel			
		Quick Save Save				Ca
Goals						
Client Goal	-None			Goal Action(s)	**Not Applicable**	
	Budgeting Credit Building					
If other client goal, specify	Savings/Investing			If other goal action(s), specify		
Target Completion Date	Other 17.1			Actual Completion Date	[1/17/2017]	
Description						
		Quick Save Save				Ca

- 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

Select an ECM Service Entry Form

<ul> <li>Employment</li> <li>Financial Counseling</li> <li>Income Support: Counseling</li> </ul>	s
	Next Cancel

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.

eca	ase nanagement			
🔰 Finan	cial Counseling - Page 1			
		Next Cancel		
Service Date				
			Start Time 10:30 AM 🔻	
	Date 10/2/2017 [ 10/2/2	<u>017</u> ]		
Service Detail	ile			
• Service Deta	Staff Person 🥝 User 🔻	Reach pe	rson you attempted to contact? 🕢 Yes 🔻	
	Contact/Location Method By phone V	] []	Contact with Client	
	Duration (Minutes) 50			
- Annatanant D	lentel			
Aparument R		Name of Entity	Status	View
Jackie Fake	0.00	Hand of Endy	Discussed pros/cons	VIOW
Units of Service	e: Time (Minutes)			
Auto Insuran				
P Auto Insuran				
Auto-Title Lo	pan			
<ul> <li>Donkruntou (</li> </ul>	(Chantar 7)			
redit Builder Loan	(with match)			
liont	1108	Manage of Linking	Statuo	Tuin Accounte?

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.

Jackie Fake FOC 9/2017	7 Case Record	Customize Pag	e   Edit Layout   Printable View   Help for this Page 🥝
-I- Show Feed			
Service Entries [1]   Direct Services [1]	Progress Notes [0]   Group / Class Assignments [0]   A	Action Plans [0]   Assessment [3]   Education [0]	Employment [0]   Outbound Referrals [0]
Outbound Referrals	New Outbound Referral		Outbound Referrals Help
No records to display			

- 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.

wah Urban TEST

4) Include any case notes you see fit.

Vutbou	nd Referral Edit V Outbound Referr	al				Help for
Outbound	Referral Edit	Save Save & New Cancel				
Informatio	n					= Requir
	Referral Date	10/2/2017 [10/2/2017]		Record Type Case Record	External Jackie Fake FOC 9/2017 Ca	
Referral D	etails and Reasons					
Referral Reason(s)	Employment services Financial services Food pantry		Chosen Housing/shelter			
Referral Reason(s) - Other						
Referral To	D					
	Referring to Organization	Breakthrough Urban - TEST				
Notes						
	Notes	Sample notes.				
		Save Save & New Cancel				

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.
- 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 Couns	eling - Page 1			
	Next Cancel			
Service Date				
			Start Time 9:00 AM V	
D	te 10/3/2017 [ <u>10/2/2017</u> ]			
▼ Service Details				
Staff Pers	Dn 🥹 User 🔻	Reach per	son you attempted to contact? 🥑 Yes 🔻	
Contact/Location Meth	bd By phone ▼		Contact with Client	
Duration (Minut	s) 20			
▼ Apartment Rental				
Client UOS		Name of Entity	Status	View
Jackie Fake 0.00			Referred to provid	er(s) V
Units of Service: Time (Minutes)				
Auto Insurance				
► Auto-Title Loan				
Bankruptcy (Chapter 7)				
Bankruptcy (Chapter 11)				



## **FINANCIAL CAPABILITIES:**

SERVICE	TIER 1A SESSION	TIER 1B SESSION*
ΙΝΤΑΚΕ	REQUIRED	N/a; COMPLETED IN TIER 1A
Assessment	Required	N/a; COMPLETED IN TIER 1A
FINANCIAL WELL-BEING	Required	Required
MEASUREMENT (CFPB SCALE)		
Credit Report (Review and	Required	Pull/review subsequent credit report required
Discuss)		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	As needed by client
	CLIENTS	
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. \*\*

Service Entries (4)   Direct Services (2)   Progress Notes (4)   Action Plans (1)   Assessment (5+)   Education (0)   Employment (0)   Outbound Referrals (2)	Back to List: Case Records								
	Service Entries [4]	Direct Services [2]	Progress Notes [4]	Action Plans [1]	Assessment [5+]	Education [0]	Employment [0]	Outbound Referrals [2]	

Assessment	Click here		Financial Health Other Test	Credit Report	Budget Balance Sheet Ac	cuplacer Test CAS	GAIN Test GAIN Test TABE	Test WorkKeys Test
Action	Assessmen	Assessment Date	Record Type	Sequence	Total Monthly Net Income	Total Net Worth	TransUnion FICO Score	Financial well-being score
🔲   Edit   Del	Assessment -1170919	12/5/2017	Financial Health	Latest	\$0.00	\$0.00		59
🔲   Edit   Del	Assessment -1170921	12/5/2017	Credit Report	Latest	\$0.00	\$0.00	595	
🔲   Edit   Del	Assessment -1170925	12/5/2017	Budget	Latest	(\$410.00)	\$0.00		
🔲   Edit   Del	Assessment -1155046	9/29/2017	Financial Health	Baseline	\$0.00	\$0.00		47
🔲   Edit   Del	Assessment -1155048	9/29/2017	Credit Report	Baseline	\$0.00	\$0.00	580	

Edit	Delete	Clone
_		



#### 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.
- 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. \*\*

« Back to	List: Case Records <u>Service E</u>	ntries [4]   Direct S	Services [2]	Progress Notes [4]   Action	n Plans [1]   Assessment [5+]   Education [0]   Employment [0]   Outbound Referrals [2]	
Action F	lans		New	Action Plan		
Action	Action Plan #	Start Date	End Date	Last Modified Date	Vision Narrative	
Edit   Del	ServicePlan-91992	9/29/2017		9/29/2017	Sally would like to open up a savings account and pay off her current debt.	
	e case manag	<b>jemen</b> 91992 - S	<b>t</b> ally Ca			
Actic	n Plan ECM Goals		No. 50		(and the second s	
G	oal-2750 Goal-2751		New EC	vi Goal	Copy Existing	
Sa	vings/Investing (Actual Com	pletion Date = 2017	-12-05) Edit ECM Go	al	Delete ECM Goal	
				Quick Save	Save] [Cancel]	



Goals			
Client Goal	Debt Management 🔻	Goal Action(s)	Available Call to negotiate better terms Make lump sum payment Move debt to lower interest credit card or loan •
If other client goal, specify		If other goal action(s), specify	Pay off credit card debt
Target Completion Date	9/1/2018 [ 12/7/2017 ]	Actual Completion Date	[ 12/7/2017 ]
Description	sample case note. 12/5/2017- Sally continues to pay a little above the minimum to reduce her debt		
	Quick Save Save		Cancel

#### **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) \*\*\*

Outbound Referral Edit     New Outbound Referral		
Outbound Referral Edit	Save Save & New Cancel	
Information		
Referral Date [12/7/2	917]	Record Type External Case Record Sally Fake FOC 9/2017 Case
Referral Details and Reasons		
Referrati Reason(s) Referrat Reason(s) - Other	Chosen v	
Peferral To		
Referring to Organization	Q.	
Notes		
Notes		
	Save Save & New Cancel	



#### 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) \*\*\*

Tax Arrears			
Transaction Dispute			
Note			
Note	Created By	Created Date	View/Edit
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