



# 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 [fftfocussupport@lisc.org](mailto:fftfocussupport@lisc.org) or bring your questions to salesforce support hours- (every Monday at 1pm CST), or Project Reinvest Support Hours (Every Tuesday at 11am 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

***PROJECT REINVEST: FINANCIAL CAPABILITIES REQUIREMENTS***

<b>SERVICE</b>	<b>TIER 1A SESSION</b>	<b>TIER 1B SESSION*</b>
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



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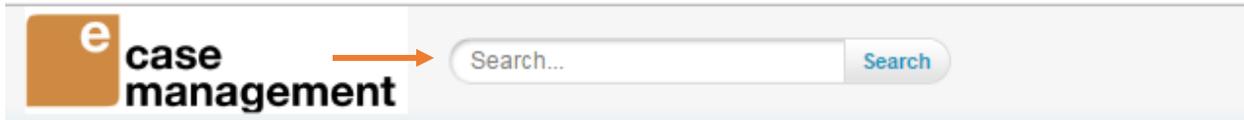
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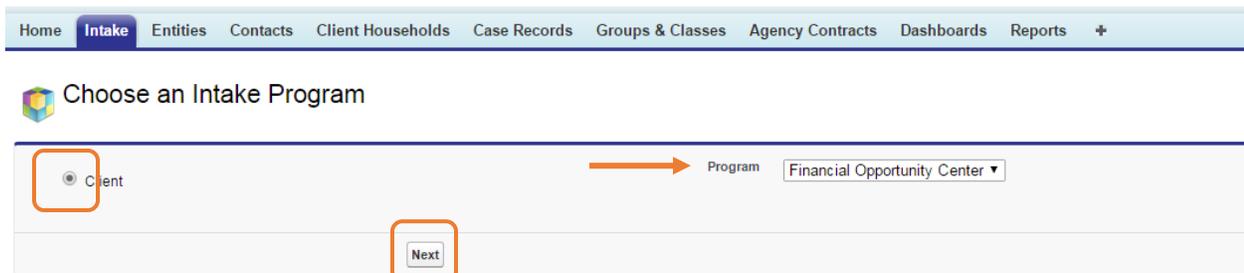
## TIER 1A

### 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"

Employment status

- (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)

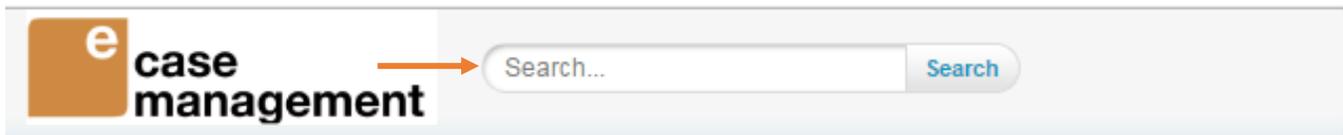
If you scroll to the middle of the **case record** you will find a section for Project Reinvest. The First 3 rows (FWB scale, Credit report, and budget) will automatically check off once those assessments are completed and recorded in the system. The bottom 4 rows (Action Plan, Financial Education, Referrals,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

Tier 1A		Tier 1B	
Authorization Form Signed	Yes	Authorization Form Signed Date	9/29/2017
Contact/Location Method	In person	Contact/Location Method - Tier 1B	In person
FWB Scale - Tier 1A	✓	Tier 1B Assessment Date	12/11/2017
Credit Report - Tier 1A	✓	FWB Scale - Tier 1B	✓
Budget - Tier 1A	✓	Credit Report - Tier 1B	✓
Action Plan - Tier 1A	✓	Budget - Tier 1B	✓
Financial Education - Tier 1A	✓	Action Plan - Tier 1B	✓
Referrals - Tier 1A	✓	Financial Education - Tier 1B	✓
Follow-up - Tier 1A	✓	Referrals - Tier 1B	✓
Follow-up - Tier 1A Date	10/30/2017	Follow-up - Tier 1B	✓
		Follow-up - Tier 1B Date	3/30/2018

Note: **Contact/Location Method** is for the counseling session NOT the follow up. Enter this after your first session with client. **Tier 1B-Assessment Date** – For Tier 1B please add the date of the first updated Tier 1B assessment

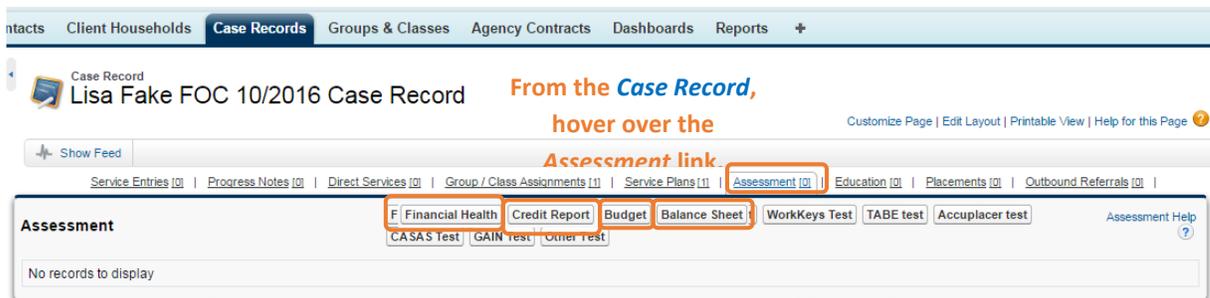
START INPUTTING ASSESSMENTS...



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

Action	Case Name	Client Name	Client	Client Household	Home Site	Program	Status	Created By
<a href="#">Edit</a>	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)).



### 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](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.

**Financial Health Assessments**

- Financial Capability Scale
- FWB Scale Scoring Worksheet
- FWB Scale User Guide

The screenshot shows the 'Assessment Edit' interface. On the left sidebar, there is a 'Financial Health Assessments' section with links to 'Financial Capability Scale', 'FWB Scale Scoring Worksheet', and 'FWB Scale User Guide'. The main content area is titled 'Assessment Edit' and includes buttons for 'Save', 'Save & New', and 'Cancel'. Below this, it shows 'Assessment Date: REMEMBER TO UPDATE DATE IF SUBSEQUENT' with a date of 10/2/2017. The 'Record Type' is 'Financial Health' and the 'Case Record' is 'Jackie Fake FOC 9/2017 Ca'. The 'CFPB Financial Well-Being (FWB) Scale' section is active, showing a dropdown for 'How did you take the questionnaire?' set to 'Someone read the questions to me.'. Two parts of the scale are highlighted with orange boxes: '(FWB) PART 1: How well does this statement describe you or your situation?' and '(FWB) PART 2: How often does this statement apply to you?'. Part 1 includes statements like 'I could handle major unexpected expense' (3 Very well) and 'I am securing my financial future' (3 Very well). Part 2 includes 'Giving gift would strain month finances' (2 Sometimes) and 'I have money left over at end of month' (3 Often). At the bottom, the 'Financial Well-Being Score' is displayed as 49.

After you save, when 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.

The screenshot shows the 'Assessment Edit' form with the following details:

- Assessment Edit** (Title)
- Buttons: Save, Save & New, Cancel
- Assessment Date:** REMEMBER TO UPDATE DATE IF SUBSEQUENT (Note: Required Info)
- Assessment Date: 10/2/2017 [ 10/2/2017 ]
- Record Type: Credit Report
- Case Record: Jackie Fake FOC 9/2017 Ca [ Search Icon ]
- Information** Section:
  - First Credit Report created?: Yes [ v ]
  - Partial/complete update of Credit Report: --None-- [ v ] [ i ]
- Participant Present?** Section:
  - Participant Present?: Yes [ v ]
  - CR Activity: does not belong to particip: No [ v ] [ i ]
- Credit Report: Complete with info from actual report, even if not accurate.**
- Was org able to pull credit report?: Yes, report(s) available [ v ]
- Equifax Report Details:**
  - Bureau: Equifax
  - Equifax Authorization Status: Every 6 months for 5 years [ v ]
  - Date Equifax Authorization Signed: 10/2/2017 [ 10/2/2017 ]
  - Equifax Type of Report: Single Bureau (Business) [ v ]
  - Equifax FICO Score Status: Got score [ v ]
  - Equifax FICO Score: 500
  - Equifax Non-FICO Score Status: Did not attempt to pull score [ v ]
- TransUnion Report Details:**
  - Bureau: TransUnion
  - TransUnion Authorization Status: --None--
  - Date TransUnion Authorization Signed: [ 10/2/2017 ]
  - TransUnion Type of Report: --None-- [ v ]
  - TransUnion FICO Score Status: --None--
  - TransUnion FICO 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.

The screenshot displays a budget entry form with the following sections:

- Monthly Expenses - Miscellaneous:** Includes fields for Charitable Giving, Gifts to Others, Newspapers/Magazines, Pet Care, Allowances for Children/Dependents, Membership Dues, Education (for participant), Average monthly financial fees, and Other Miscellaneous Expenses. A total of \$0.00 is shown for Miscellaneous Expenses.
- Other Expenses (migrated data):** Includes a field for Other Expenses (migrated data).
- Monthly Savings Target:** Shows a target of \$50.00.
- Total Monthly Net Income:** A summary table with the following values:

Total Monthly Income	\$1,700.00
Total Monthly Expenses	\$1,175.00
Total Monthly Net Income	\$525.00
- Notes:** A field for entering notes.
- System Information:** Shows Assessment # 1155279, Created By Carolina Rendon (10/2/2017 10:03 AM), and Last Modified By Carolina Rendon (10/2/2017 10:03 AM). Includes a checkbox for Migrated Duplicate Record and buttons for Edit, Delete, and Clone.

**Action Plan:**

*What is an Action Plan?* The Action plan include a vision which is a high level goal or Long term goal for your clients financial future. The “ECM goal” would then be the short term goals your client will need to accomplish to get to that longer term goal. Goal should be **SMART** (specific, measurable, Achievable, Relevant, and Time Limited). For Project Reinvest it is required that the action plan have a goal(s) with clear actions steps clients will take towards achieving their goals and a “Targeted completion date” for this goal.

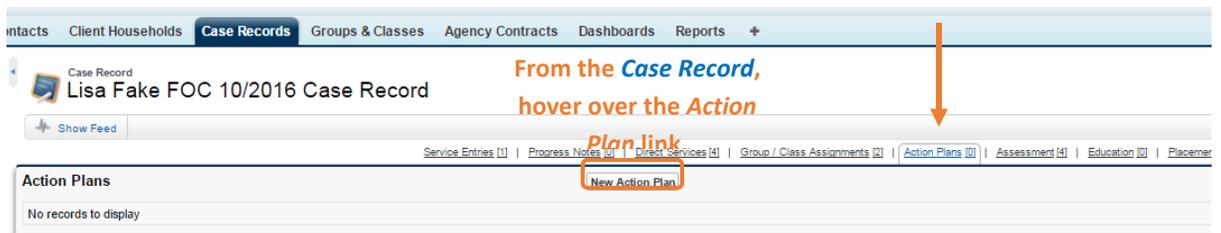
*Example:*

**Vision-** Lisa has lost a few jobs due to unreliable transportation. Her vision is to gain a reliable transportation through car ownership. She wants to save enough money to buy a decent used car and pay for any other expenses that go along with car ownership.

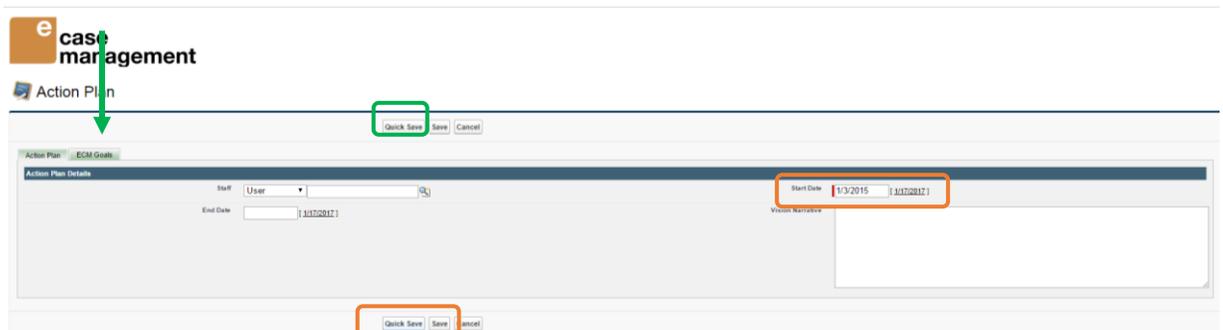
**ECM Goal-** Lisa will begin find ways to reduce her other expense so that she can save \$50 from each pay check (paid bi-weekly) with a goal of saving a total of \$4,000 to cover the purchase, taxes and registration of a car.

**Target completion Date:** July 18, 2018

- 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*.





Action Plan

Quick Save Save Cancel

Action Plan ECM Goals

New ECM Goal Copy Existing

Quick Save Save Cancel

Quick Save Save Cancel

Goals

Client Goal:

Goal Action(s):

If other client goal, specify:

If other goal action(s), specify:

Target Completion Date:

Actual Completion Date:

Description:

Quick Save Save Cancel

- 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)

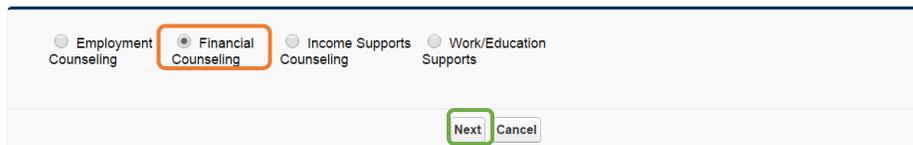
Financial Education:

- 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.

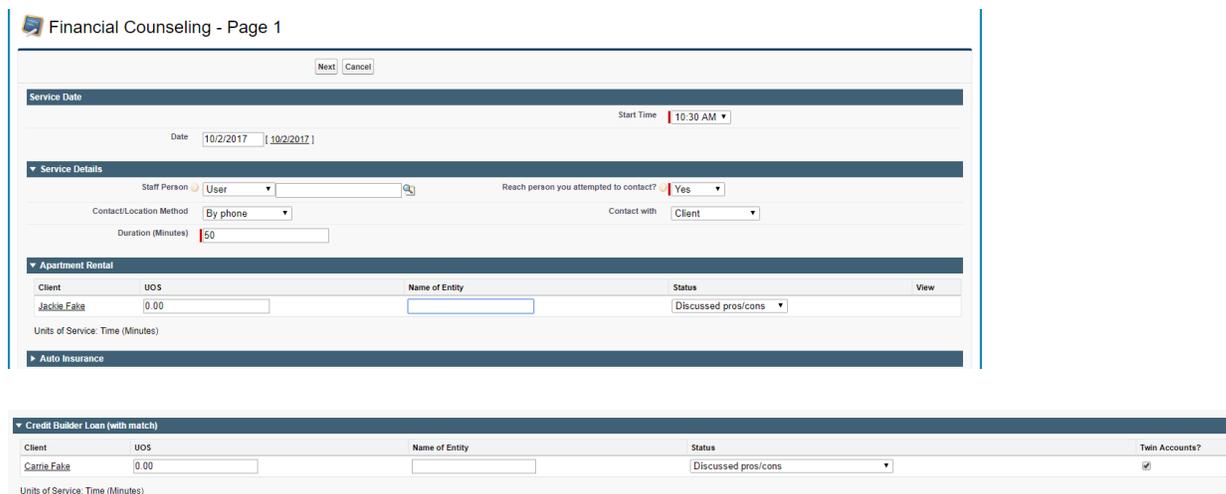


- 2) Select the type of service entry (ie. Financial Counseling); **Next**

Select an ECM Service Entry Form



- 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.

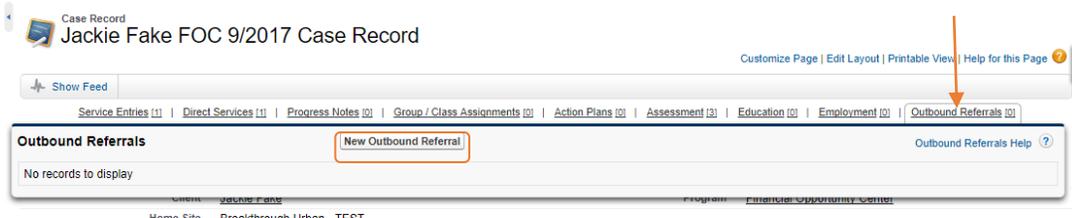


- 4) After you click save you must navigate back to your client's case record and **Manually** Check off "Financial Education". (Instructions on page 3)

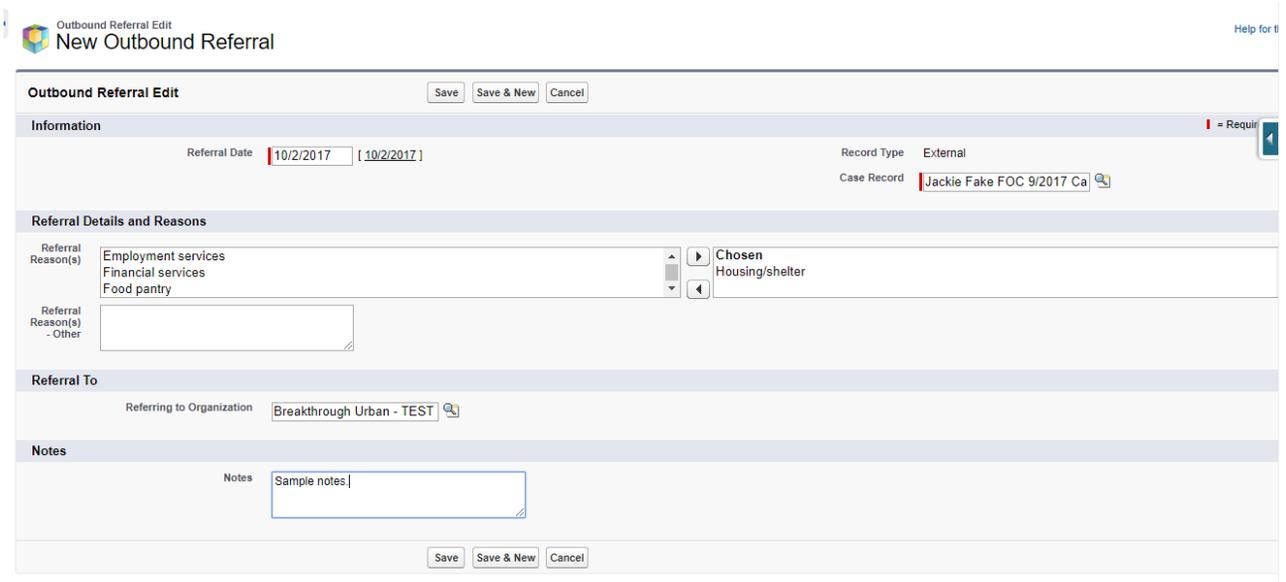
**Referrals:**

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 button 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 (Tier 1A):*

- 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

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**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		<span style="border: 1px solid #ccc; padding: 2px;">Referred to provider(s)</span>	View

Units of Service: Time (Minutes)

---

**Auto Insurance**

---

**Auto-Title Loan**

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**Bankruptcy (Chapter 7)**

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**Bankruptcy (Chapter 11)**

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**Bankruptcy (Chapter 13)**

**TIER 1B**

Below are 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.

**PROJECT REINVEST: FINANCIAL CAPABILITIES TIER 1B REQUIREMENTS**

<b>SERVICE</b>	<b>TIER 1A SESSION</b>	<b>TIER 1B SESSION*</b>
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

**Updated Financial Well-Being (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. \*\*



**Updated 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. \*\*

**Updated Budget (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. \*\*

**Updated Action Plan (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. \*\***

Service Entries (4) | Direct Services (2) | Progress Notes (4) | **Action Plans (1)** | Assessment (5+) | Education (0) | Employment (0) | Outbound Referrals (2)

**Action Plans**

Action	Action Plan #	Start Date	End Date	Last Modified Date	Vision Narrative
<a href="#">Edit</a>   <a href="#">Del</a>	ServicePlan-91992	9/29/2017		9/29/2017	Sally would like to open up a savings account and pay off her current debt.

---

**case management**

ServicePlan-91992 - Sally Carolina Rendon Fake

Quick Save Save Cancel

Action Plan ECM Goals

New ECM Goal Copy Existing

Goal-2750 Goal-2751

Savings/Investing (Actual Completion Date = 2017-12-05)

Edit ECM Goal 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. Chosen: Other

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 (as needed by client):**

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

Save Save & New Cancel

Information

Referral Date [ 12/7/2017 ] Record Type External Case Record Sally Fake FOC 9/2017 Case

Referral Details and Reasons

Referral Reason(s) Available Chosen  
Childcare  
Disability services

Referral Reason(s) - Other

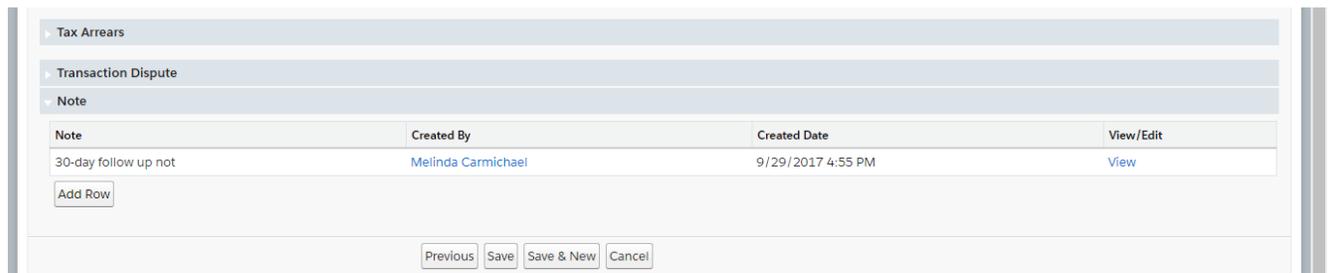
Referral To Referring to Organization

Notes

Save Save & New Cancel

*Follow-up (Tier 1B):*

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) \*\*\*



Note	Created By	Created Date	View/Edit
30-day follow up not	Melinda Carmichael	9/29/2017 4:55 PM	<a href="#">View</a>

Buttons: Add Row, Previous, Save, Save & New, Cancel

REMEMBER- On the case record enter please add the date of the first updated Tier 1B assessment in the field, “Tier 1B-Assessment Date” (reference page 3)

**REPORTING:**

**TIER 1A REPORTS:**

When running reports, you will first need to adjust the “Time Frame” and assessment dates.

Please see below. To edit Assessment Dates you must click on “customize” first.

The screenshot shows the LISC reporting interface for 'Project Reinvest Full Demo report Tier1A'. The 'Report Options' section includes a 'Time Frame' dropdown set to 'Custom' with a date range from 9/1/2017 to 12/31/2017. The 'Filtered By' section contains several criteria, with 'AND Assessment Date greater or equal 9/1/2017' and 'AND Assessment Date less or equal 2/20/2018' highlighted. The data table below shows three records for 'Home Site Market - (3 records)' with columns for Case Record ID, Authorization Form Signed Date, Assessment Date, Follow-up Tier 1A Date, Contact/Location Method, and various demographic and financial indicators.

Case Record ID	Authorization Form Signed Date	Assessment Date	Follow-up Tier 1A Date	Contact/Location Method	First Name	Last Name	Client Age	Client Race	Client Ethnicity	Client Gender	Client Highest Grade Completed	Client Working at program entry?	Client Mailing Street	Client Mailing City	Client Mailing State/Province	Client Mailing Zip-Postal Code	I could handle major unexpected expense	I am securing my financial future	Because of S I'll never have what I want	I can enjoy life because how I manage S	I am just getting by financially	I'm concerned S I have/save won't last	Giving gift would strain month finances	I have money left over at end of month	I am behind with my finances	My finances control my life
a036000003Wey2AAC	9/1/2017	9/2/2017	2/12/2018	In person	Carnie	Fake	37	Bi-racial	Hispanic	Female	Some College	-	-	-	-	60603	1 Very little	1 Very little	2 Somewhat	2 Somewhat	2 Somewhat	3 Very little	1 Often	2 Sometimes	2 Sometimes	2 Sometimes
a0360000088axAAR	9/29/2017	12/5/2017	10/30/2017	-	Sally	Fake	25	African American/Black	Hispanic	Female	High School Diploma	Employed part time	135 S. LaSalle St	Chicago	IL	60603	2 Somewhat	2 Somewhat	2 Somewhat	3 Very well	4 Not at all	2 Somewhat	2 Sometimes	3 Often	3 Rarely	3 Rarely
a0360000088axAAR	9/29/2017	9/29/2017	10/30/2017	-	Sally	Fake	25	African American/Black	Hispanic	Female	High School Diploma	Employed part time	135 S. LaSalle St	Chicago	IL	60603	1 Very little	1 Very little	2 Somewhat	2 Somewhat	3 Very little	1 Very well	2 Sometimes	2 Sometimes	2 Sometimes	1 Often

**Project Reinvest Services- Tier 1A-** This report shows all the services provided to Tier 1A clients (clients with an authorization signed date greater or equal to 9/1/2017) including what services still need to be completed to be counted in the Full demographic report.

Report Link: <https://lisc.force.com/partners/00036000007g71T>

**Project Reinvest Full Demo report Tier1A-** Full report with demographics. This is will only include clients who have completed all the requirements for Tier 1A including a follow up. (Note: This report may produce duplicates and sites should refer to **unduplicated number** for outcomes)

Report Link: <https://lisc.force.com/partners/00036000007gDGB>



**PRFC Contact Method Tier1A-** This is a report for the quarterly narrative report. Question #4 asks “Total Number of Units of Counseling/ coaching units provided (by mode of counseling)

Report Link: <https://lisc.force.com/partners/00036000007gGDt>

TIER 1B REPORTS:

**Project Reinvest Services Tier 1B-** This report shows all the services provided to Tier 1B clients including what service still need to be complete to be counted in the Full demographic report.

Report Link: <https://lisc.force.com/partners/00036000007g71i>

**Project Reinvest Full Demo Tier 1B -** Full report with demographics. This is will only include clients who have completed all the requirements for Tier 1B including a follow up.

Report Link: <https://lisc.force.com/partners/00036000007gDfQ>

**PRFC Contact Method Tier 1B -** This is a report for the quarterly narrative report. Question #4 asks “Total Number of Units of Counseling/ coaching units provided (by mode of counseling)

Report Link: <https://lisc.force.com/partners/00036000007gGFQ>

OTHER REPORTS:

**Project Reinvest- Action Plan Goals-** *This report answers question #7 of the PRFC Quarterly Report. “Goals Established in Clients’ Action plan”*

Report Link: <https://lisc.force.com/partners/00036000007g3DY>

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