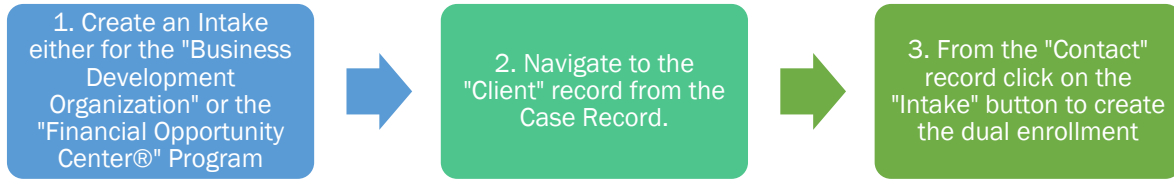


FOC / BDO Dual Enrollment: Salesforce Flow

Instructions: Complete the following steps to avoid adding duplicates in the system and to create a dual enrollment for clients who are receiving entrepreneurship coaching and financial coaching.



Financial Opportunity Center® (FOC) Salesforce General Guidelines

<p>INTAKE</p> <ul style="list-style-type: none"> Search for participant and household members before entering them (For Workshops/Orientation only, create Contact only) For Counseling/Tax Prep, enroll in FOC or Tax Prep program Enter Demographics and add Household Members Complete Case Record information From Case Record, add Test Assessment(s), as applicable Search for and/or add Entities, as applicable From Case Record, add Employment Record(s) and/or Education/Training Program Record(s), as applicable 	<p>GROUPS AND CLASSES</p> <ul style="list-style-type: none"> Add new Group/Class (Workshop/Class, Resource Room, or Work/Education Supports) Add members to Group/Class If Group/Class will meet weekly or monthly, schedule sessions Record attendance 	<p>TAX PREPARATION</p> <ul style="list-style-type: none"> Record Tax Return assessment
<p>FINANCIAL COACHING (FC) (from FOC Case Record)</p> <p><u>First Session</u></p> <ul style="list-style-type: none"> Record Assessments: <ul style="list-style-type: none"> Financial Health Credit Report Budget Balance Sheet Create an Action Plan Record Service Entry(ies): Financial Coaching <p><u>Subsequent Sessions</u></p> <ul style="list-style-type: none"> Clone and record Assessments to record updates: <ul style="list-style-type: none"> Financial Health (at least every 6 months) Credit Report (at least every 6 months) Budget Balance Sheet Update Action Plan Record Service Entry(ies): Financial Coaching <p><u>Unsuccessful Contacts</u></p> <ul style="list-style-type: none"> Record Service Entry: Financial Coaching 	<p>EMPLOYMENT COACHING (EC) (from FOC Case Record)</p> <p><u>First/Subsequent Sessions</u></p> <ul style="list-style-type: none"> Record Service Entry(ies): Employment Counseling and/or Work/Education Supports Search for and/or add Entities, as applicable Add Employment Record(s), Education/Training Program Record(s), and/or Degree/Certificate/License Record(s) as applicable Record progress on an Education/Training Program Record, as applicable Record Advancement (to verify retention and/or record job changes) on an Employment Record, as applicable Exit Employment Record and/or Education/Training Program Record, as applicable Make sure a new Budget Assessment is entered, as applicable <p><u>Unsuccessful Contacts</u></p> <ul style="list-style-type: none"> Record Service Entry: Employment Counseling 	<p>INCOME SUPPORTS COACHING (ISC) (from FOC Case Record)</p> <p><u>First Session</u></p> <ul style="list-style-type: none"> Record Service Entry(ies): Income Supports Counseling, including General Benefits Screening Results and Eligible Benefits fields <p><u>Subsequent Sessions</u></p> <ul style="list-style-type: none"> Record Service Entry(ies): Income Supports Counseling Make sure a new Budget and/or Balance Sheet Assessment is entered, as applicable <p><u>Unsuccessful Contacts</u></p> <ul style="list-style-type: none"> Record Service Entry: Income Supports Counseling

Business Development (BDO) Salesforce General Guidelines

<p>INTAKE</p> <ul style="list-style-type: none"> First, search for participant and household members before entering them (For Training only-clients, create Contact only) For Counseling clients, enroll in Business Development Program via an intake Complete Business and Case Record information From Case Record, add Service Sessions, access to capital updates, and employee & revenue updates. 	<p>ENTREPRENEURSHIP COACHING (from BDO Case Record)</p> <p>First Session</p> <ul style="list-style-type: none"> Gather at-intake information <ul style="list-style-type: none"> Business Demographics Owner Demographics Business Current Revenue Business Current # of Employees Record Service Entry(ies): Business Coaching <ul style="list-style-type: none"> Loan Applications Grant Applications Business Coaching <p>Subsequent Sessions</p> <ul style="list-style-type: none"> Business Growth/Retention updates: <ul style="list-style-type: none"> Business Current Revenue Business Current # of Employees Record Service Entry(ies): Business Coaching <p>Unsuccessful Contacts</p> <ul style="list-style-type: none"> Record Service Entry: Business Coaching
<p>GROUPS AND CLASSES</p> <ul style="list-style-type: none"> Add new Group/Class (Workshop) Add members to Group/Class If Group/Class will meet weekly or monthly, schedule sessions Record attendance 	