Digital inclusion – Data entry training guide

Summary: This is a simulation of how you will use FFT Salesforce to track client outcomes for digital inclusion work. This exercise assumes that you already have basic knowledge of the system. If you are new to Salesforce you should start with this new user guide.

You will use this guide to enter a fake 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, held the first and third Monday of every month (excluding holidays).

In this guide you will learn:

1) How to enter a 1 on 1 digital literacy service:
   - Service Entries (one to one digital literacy across all service areas)
     - Passing an exam (Employment Counseling)
     - Lending library (Work/Education Support)
2) How to enter digital literacy service for a group /workshop (in-person or virtual)
   - Groups/Classes
     - Workshop/class (Digital literacy workshops and across all areas)
     - Work/education support (Lending library)
     - Resource Room (Computer/internet)

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Start by signing in using the following credentials…

Please do not login to your personal salesforce account for this exercise

Salesforce Login information:

Website: https://partial-lisc.cs66.force.com/partners/login

User Name: usera@lisc.org.partial

Password: Welcome2021

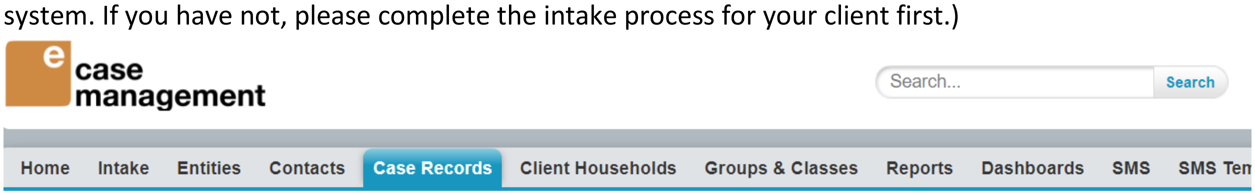
Service entries –

Service entries are used to track any one to one digital instruction and/or navigation. For example, you may be helping a client to open a bank account online or view the balance of existing bank account online. There is a digital literacy component to that training because there are a variety of skills that the client would need to know or learn in order to accomplish this goal. Some digital skills may include:

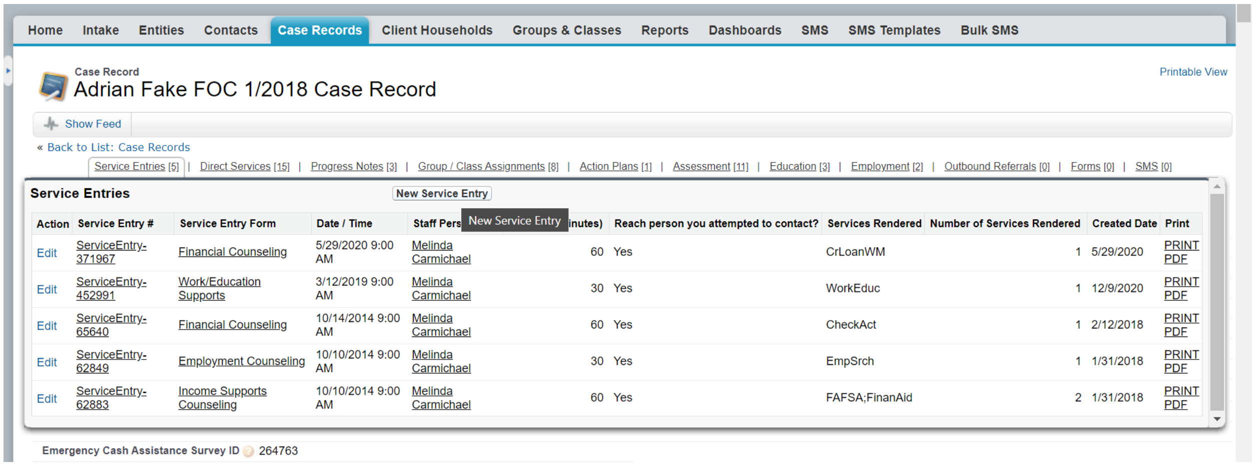
- Internet basics – how to navigate to a certain website
- Internet safety and security – how to determine if a website is safe and what information can be shared online
- How to create an online account- with a username and password (including how to keep that information safe for future use; and/or how to log in if they forgot their password.)
- How to navigate the banking online platform to view their information (statements etc.)

The ultimate goal is financial, so we will create a financial counseling service entry and mark that there was a digital skills training or navigation as part of it.

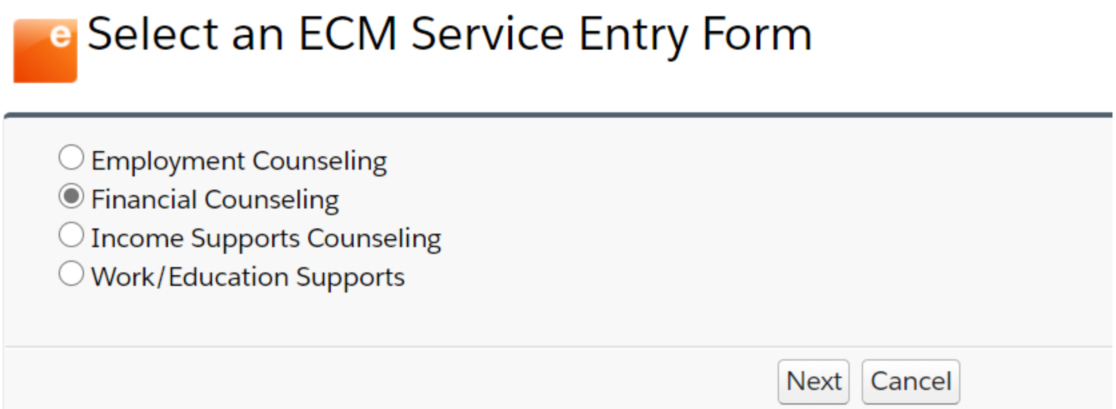
1. Search for your client's case record. (This step assumes that you have created a fake client in the system. If you have not, please complete the intake process for your client first.)



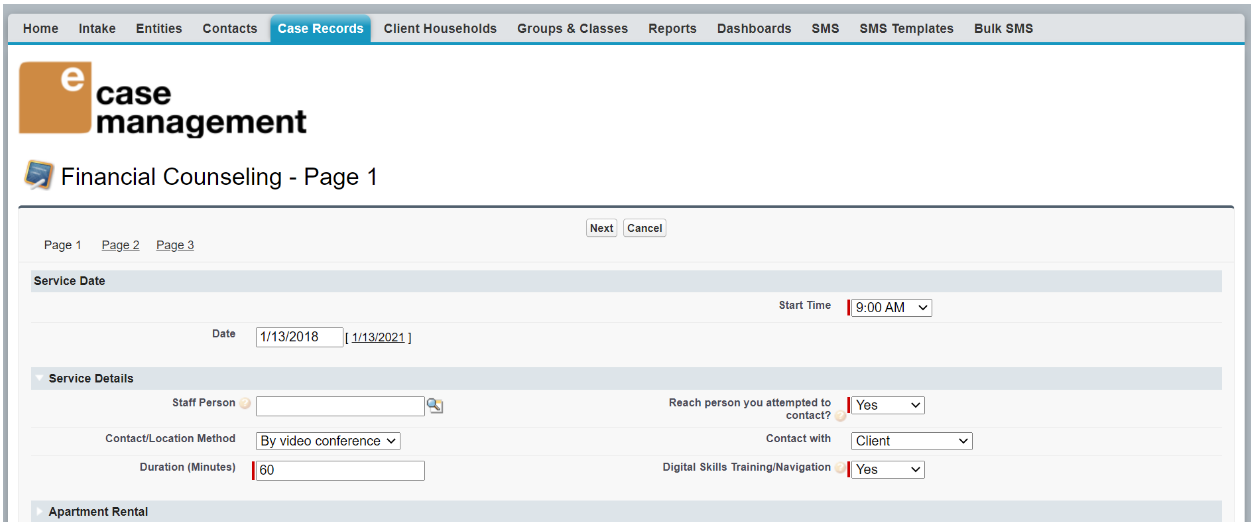
2. Select your client's case record. From the case record, hover over "Service entry" tab and click on "new service entry"



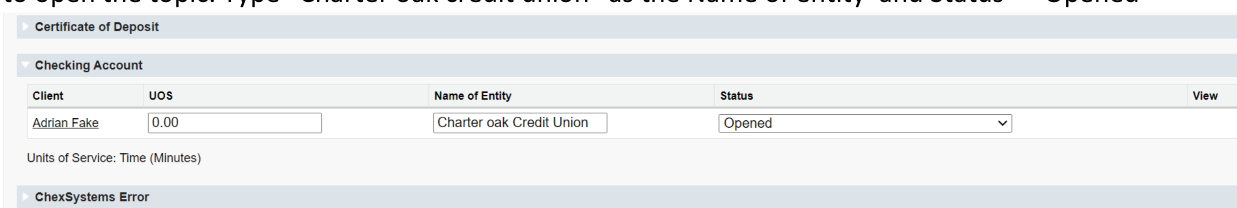
3. Select "Financial Counseling" and next



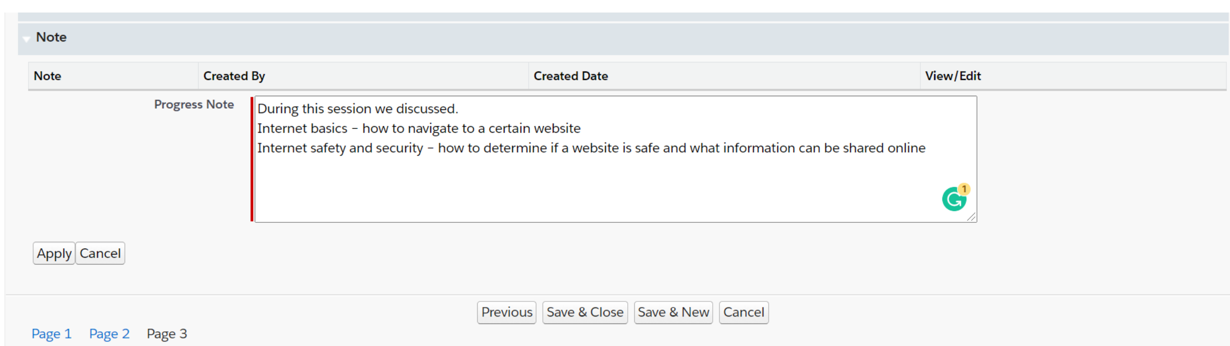
4. Complete the service details, Using 1/13/2018 as the date. Select "yes" for reached person attempted to contact. 60 for "duration (minutes)" and Digital skills training/navigation "yes". Selecting "yes" for Digital skills training /navigation marks this record as a digital service. (Note this field is available as part of the Employment counseling and income support service entries as well. Based on the client's ultimate goal you will select the service area that best fits. If you are unsure which service area to select please reach out to the Salesforce support email for assistance.)



5. Select the applicable service topic. In this case it will be “Checking account”. Click on the carrot to open the topic. Type “Charter oak credit union” as the Name of entity and Status = “Opened”



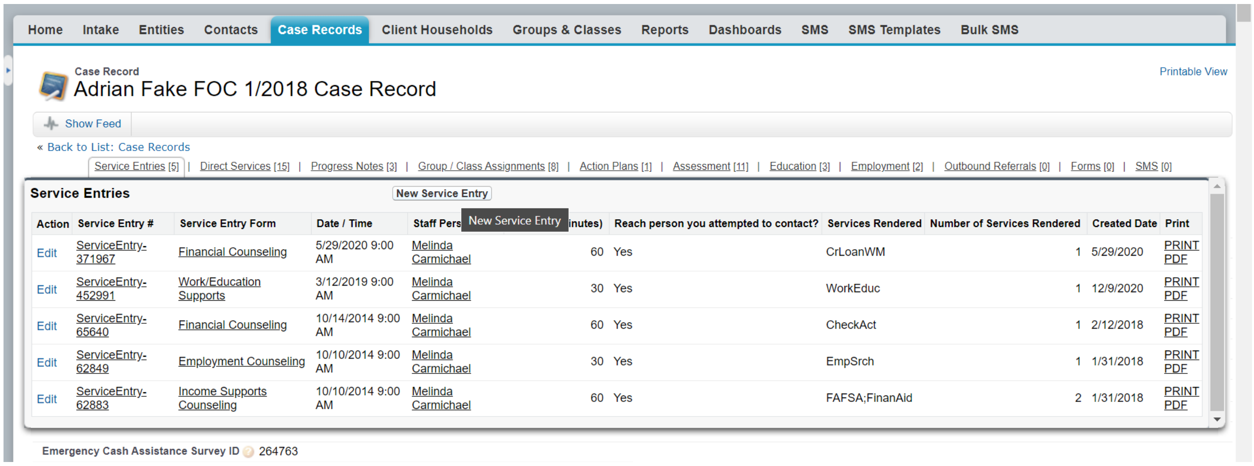
6. Navigate to the last page of this service entry to add your progress note. At the bottom of the page click on “add row”. Add your service note here (example below). This is an opportunity to provide more details about the session itself for the future. Then click “apply” and “save & close”.



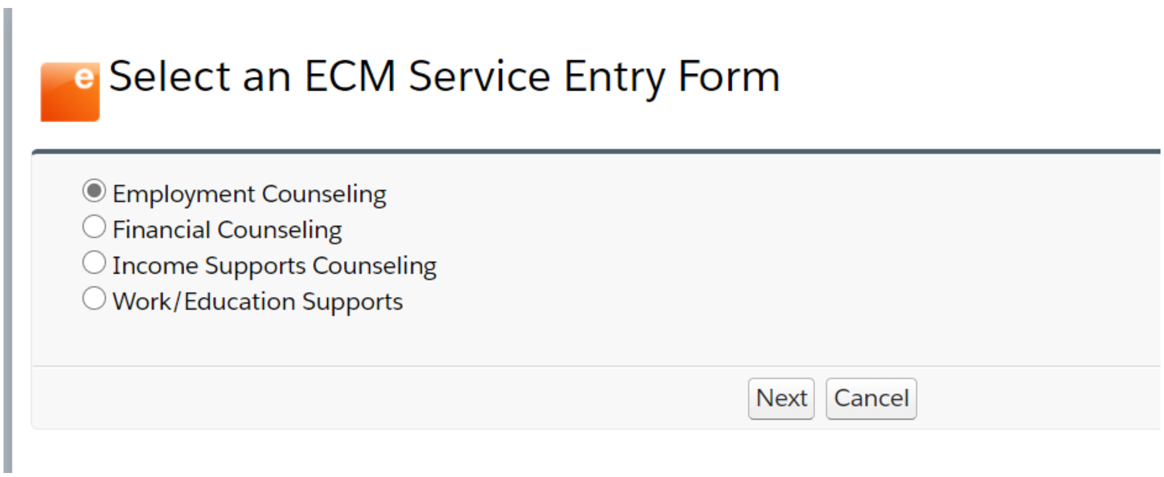
Recording a passed exam:

Client will take exams to show digital skills gain after instruction. Your agency can use either Northstar digital literacy or Accenture learning exchange to administer these test. A client has passed the exam if they have received 80% or higher. This can then be tracked in salesforce the following way:

1. From your client's case record, hover over service entries and click on "new service entry".

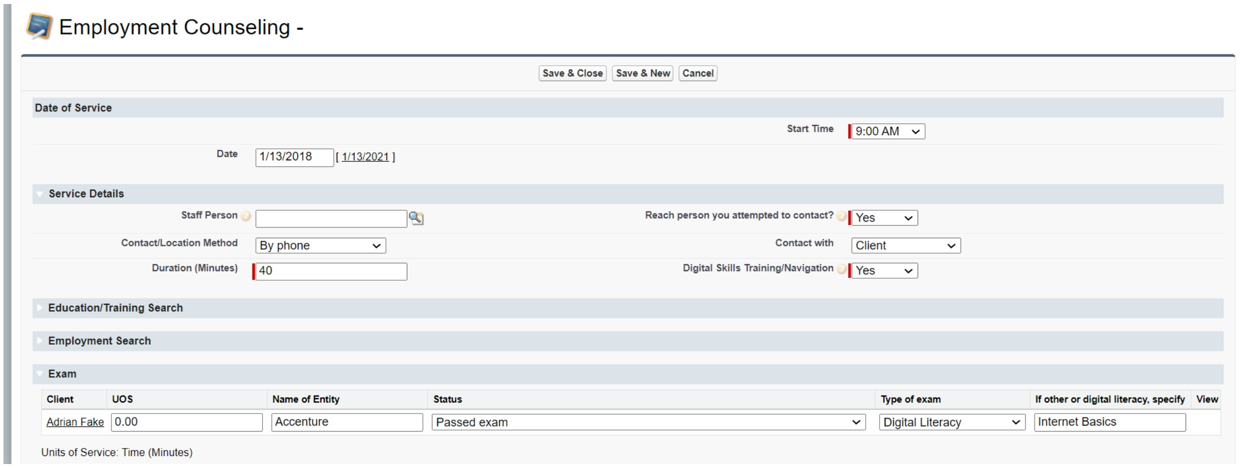


2. Select "employment counseling" and click next.



3. Complete the service details, Using 1/13/2018 as the date. Select "yes" for reached person attempted to contact. 60 for "duration (minutes)" and Digital skills training/navigation "yes". Selecting "yes" for Digital skills training /navigation marks this record as a digital service.

4. Open the “Exam” service topic by clicking on the carrot next to the name. The name of entity will be either “Northstar digital learn” or “Accenture Learning exchange” depending on the site used to administer the test. The status will be “Passed exam”, select “digital literacy” as the type of exam and then type in the name of the exam “Internet basics”.

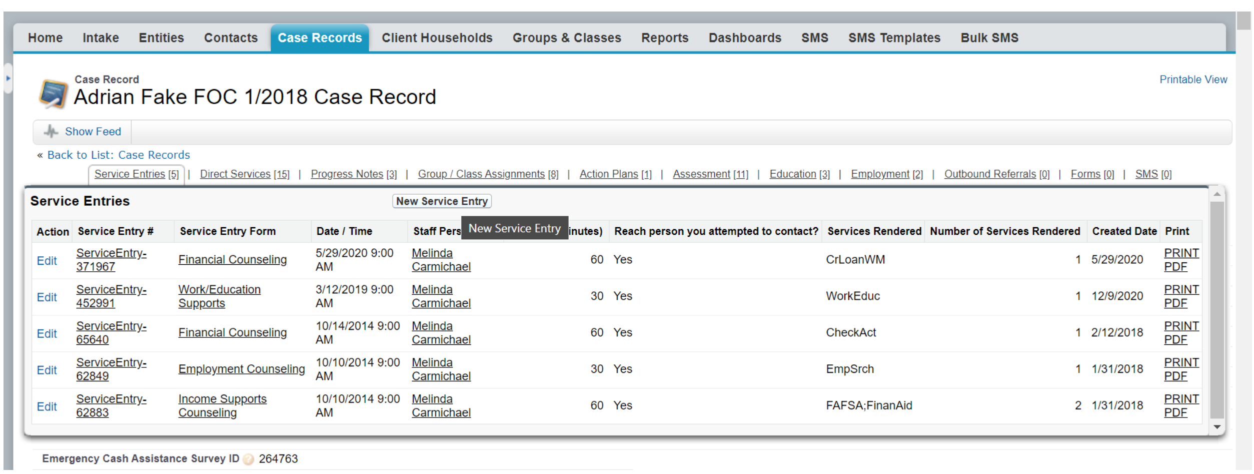


5. You can add a progress note by clicking add note, then apply, save and close.

Lending Library:

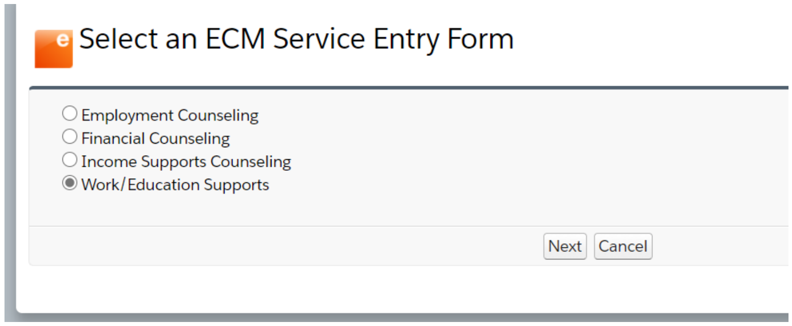
Through lending libraries organizations are able to provide clients with a loaner laptop or other electronic equipment to provide support for a client to attend classes virtually or job search safely from home. This can be created through a work/education support service entry

1. From your client’s case record, hover over service entry and click on “new service entry”

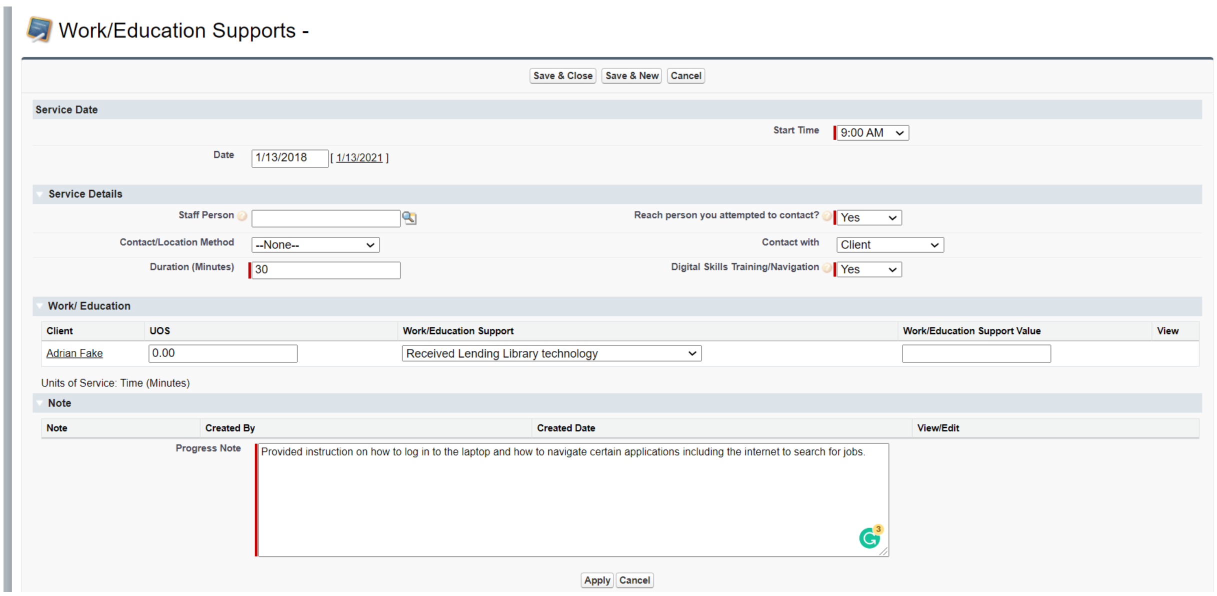


Action	Service Entry #	Service Entry Form	Date / Time	Staff Pers	inutes)	Reach person you attempted to contact?	Services Rendered	Number of Services Rendered	Created Date	Print
Edit	ServiceEntry-371967	Financial Counseling	5/29/2020 9:00 AM	Melinda Carmichael	60	Yes	CrLoanWM	1	5/29/2020	PRINT PDF
Edit	ServiceEntry-452991	Work/Education Supports	3/12/2019 9:00 AM	Melinda Carmichael	30	Yes	WorkEduc	1	12/9/2020	PRINT PDF
Edit	ServiceEntry-65640	Financial Counseling	10/14/2014 9:00 AM	Melinda Carmichael	60	Yes	CheckAct	1	2/12/2018	PRINT PDF
Edit	ServiceEntry-62849	Employment Counseling	10/10/2014 9:00 AM	Melinda Carmichael	30	Yes	EmpSrch	1	1/31/2018	PRINT PDF
Edit	ServiceEntry-62883	Income Supports Counseling	10/10/2014 9:00 AM	Melinda Carmichael	60	Yes	FAFSA;FinanAid	2	1/31/2018	PRINT PDF

2. Click on “work/education supports” and then click next



3. Complete the service details, Using 1/13/2018 as the date. Select “yes” for reached person attempted to contact. 30 for “duration (minutes)” and Digital skills training/navigation “yes”. Selecting “yes” for Digital skills training /navigation.
4. Select “Received Lending library technology” as a work/education support



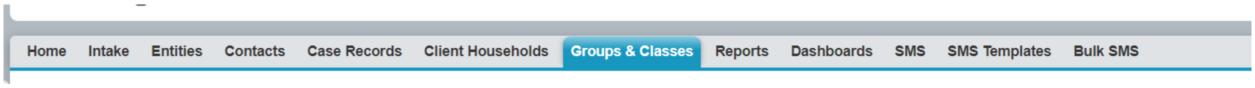
5. Add a progress note by clicking “add note” , apply and then save and close

Group & Classes

If your organization conduct virtual or in-person digital workshops to a group of people, these types of instruction can be recorded through “Groups & Classes” as a workshop/class. Through groups and classes, you will also be able to record client’s use of your resource room to gain access to the internet/computer. Lastly, if you have a group of clients that receive work/education support at the same time you can enter this all at one time together through a group/class.

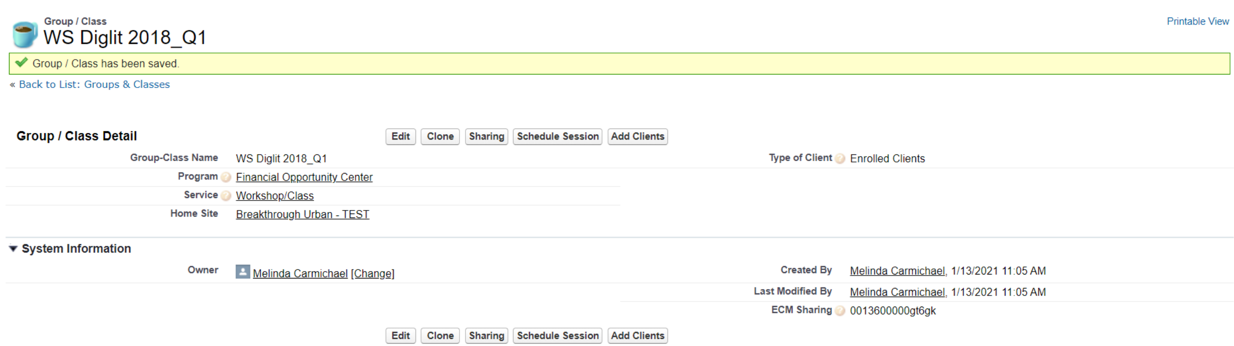
Workshop/class –

1. From the main menu bar at the top, select "groups & classes" and then click "new group/class"

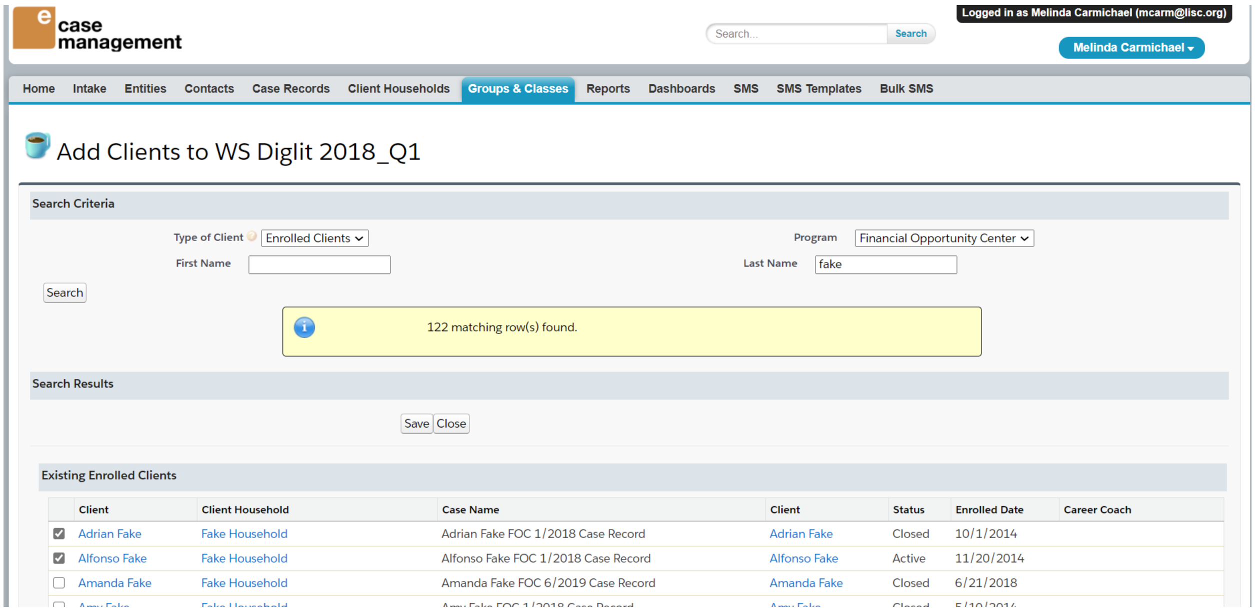


2. Type in your group name, for this exercise use "WS Diglit 2018" and add your initials at the end group name (note: this is only required in the test site because many people will be creating the same group and you will need to have a unique name)

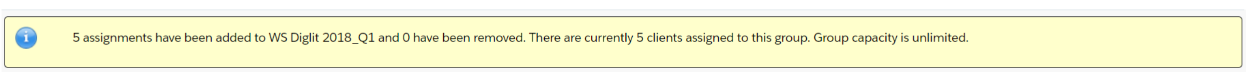
3. Select "enrolled clients" in the available box and move it to the chosen box.
4. Type "Financial Opportunity Center" for the program; Type "Workshop/Class" for the Service and type "Breakthrough urban- Test" for the home site. If you are having any issues with any of these, please try clicking on the magnifying glass next to each field, typing the above and click search, then select the item that appears from the search.
5. Click "save" and you have officially created the group



6. Next you will need to add clients to the group. Click on “add client” at the top or the bottom of this record.



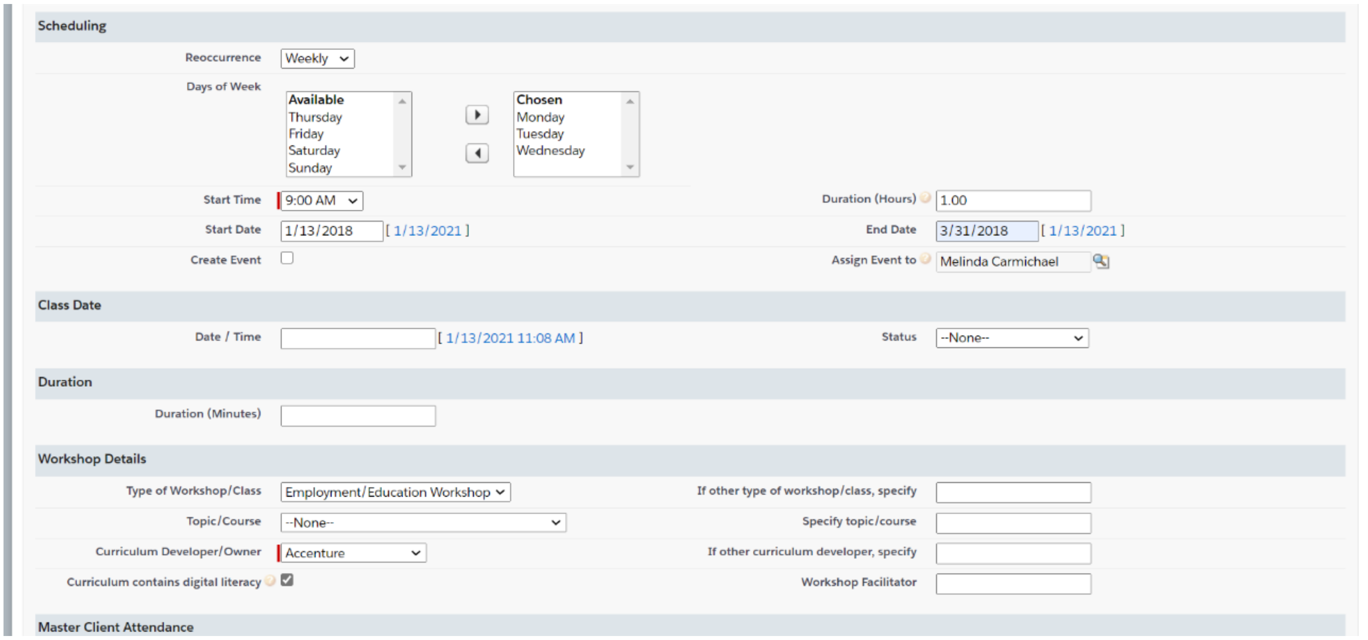
   a. Select “Enrolled client” as type of client
   b. Select “Financial opportunity center” for program
   c. Then search you client. You can search either the first name or last name or both. Start by searching your client and click on the check box next to their name and click “save”. You must click save before moving onto a new search. You will receive confirmation that the clients were added.



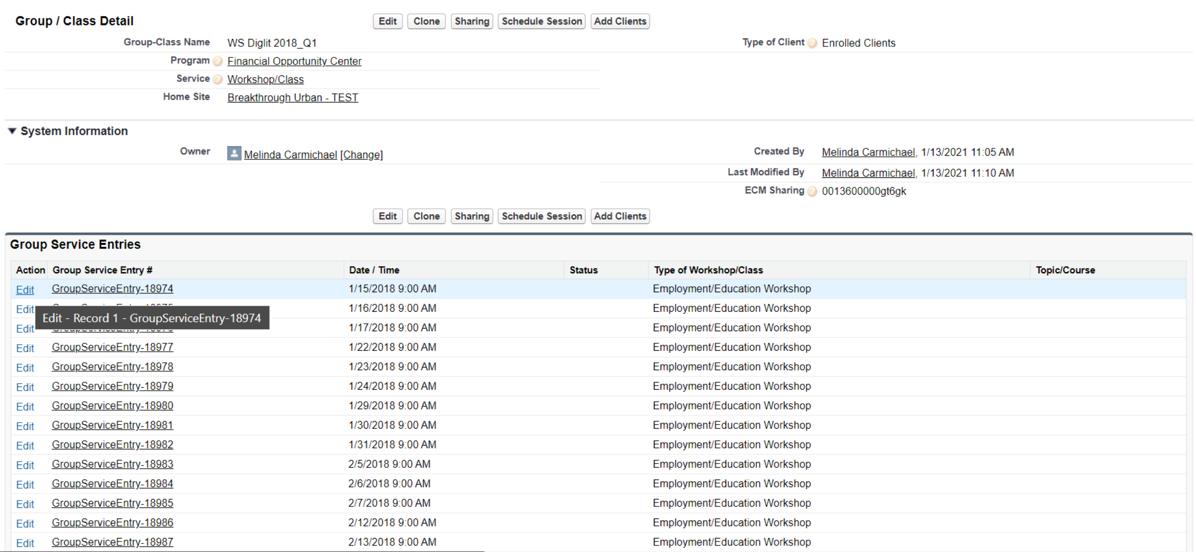
   d. Next search for the last name “Fake” and add at least 2 more clients by clicking on the check box by their name and click “save” then “close”

7. Then you will want to schedule the workshop sessions. Click on Schedule session on the main group screen.
   a. The reoccurrence option will allow you to easily schedule multiple classes that repeat weekly or monthly or example. For this example, we are hosting workshops every Monday, Tuesday and Wednesday from 1/13/2018 through 3/31/2018 and so are needing to schedule the workshops ahead of time. We can do this by selecting “weekly” for reoccurrence and selecting Monday, Tuesday and Wednesday to move over to the chosen box
   b. Select the start and end date for your reoccurring class

c. Type “Accenture” as the curriculum developer, then click save and close to schedule all the sessions. We will edit the session details after they are all scheduled.

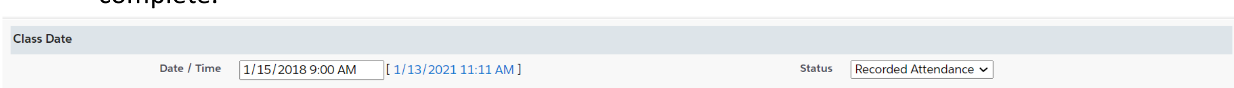


8. When you return back to the main screen for your group, you will see all of your reoccurring sessions and clients enrolled in the class. Select edit on any individual session to record attendance and edit the topic.

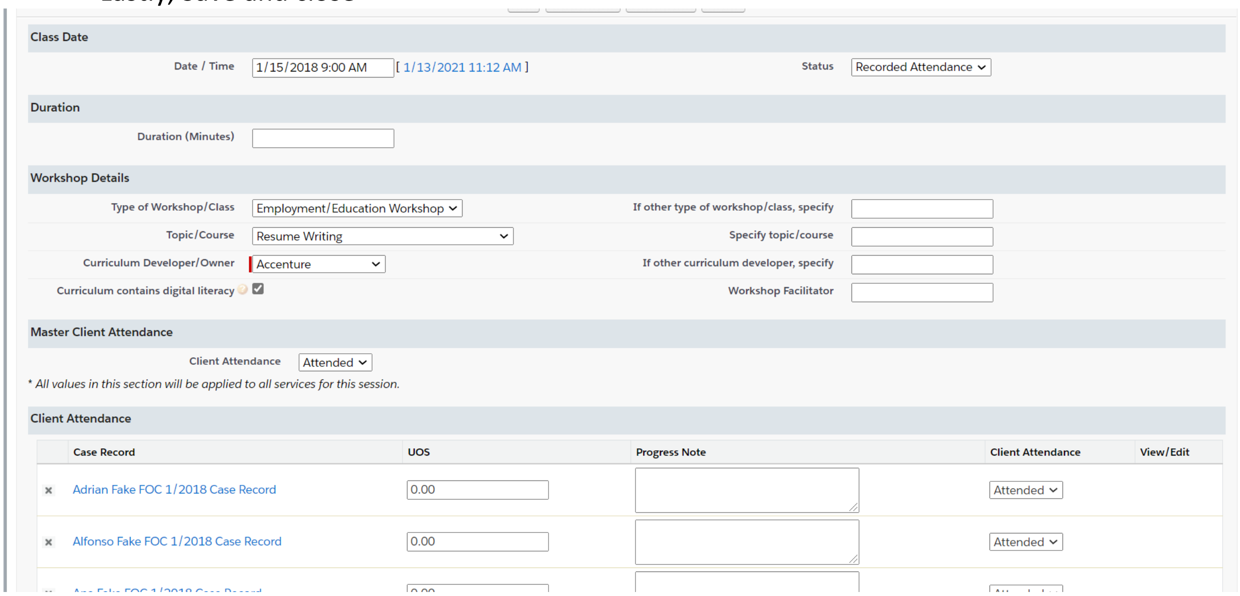


Action	Group Service Entry #	Date / Time	Status	Type of Workshop/Class	Topic/Course
Edit	GroupServiceEntry-18974	1/15/2018 9:00 AM		Employment/Education Workshop	
Edit	[illegible]	1/16/2018 9:00 AM		Employment/Education Workshop	
Edit	[illegible]	1/17/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18977	1/22/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18978	1/23/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18979	1/24/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18980	1/29/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18981	1/30/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18982	1/31/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18983	2/5/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18984	2/6/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18985	2/7/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18986	2/12/2018 9:00 AM		Employment/Education Workshop	
Edit	GroupServiceEntry-18987	2/13/2018 9:00 AM		Employment/Education Workshop	

9. Start by changing the “Status” to “recorded attendance”, this will mark the workshop as complete.



10. Next, update the workshop details.
    a. Select "employment /education workshop" as the type of workshop/class.
    b. "Resume writing" as topic/course
    c. Check the box that says "Curriculum contains digital literacy" to mark this session as a digital literacy service
11. Record each individual client's attendance. You should not delete a client if they did NOT attend that particular class. There is an option under client attendance to select "No Show" or "Cancelled". Tip: select attended in "Client attendence" to auto populate all clients in the group. Lastly, Save and close

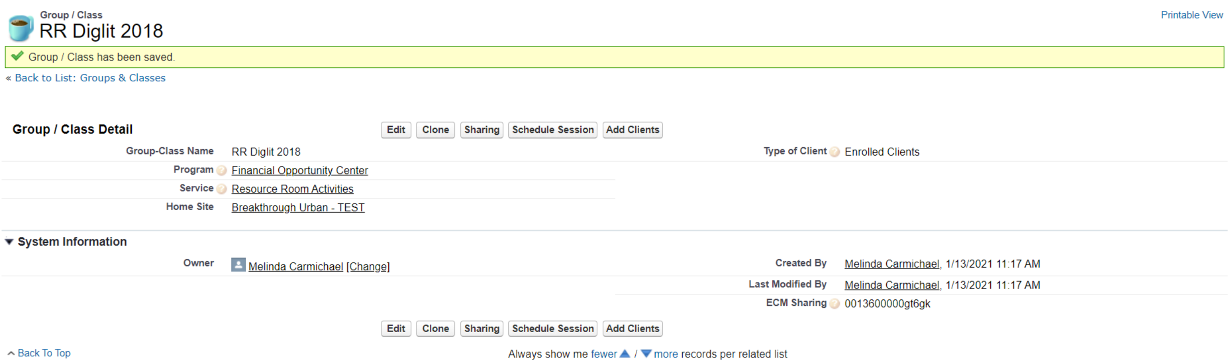


Resource Room

Many FOCs have a space that clients can drop in to use a number of different resources like a fax machine, photocopier or computer. This is tracked through "Groups and classes"

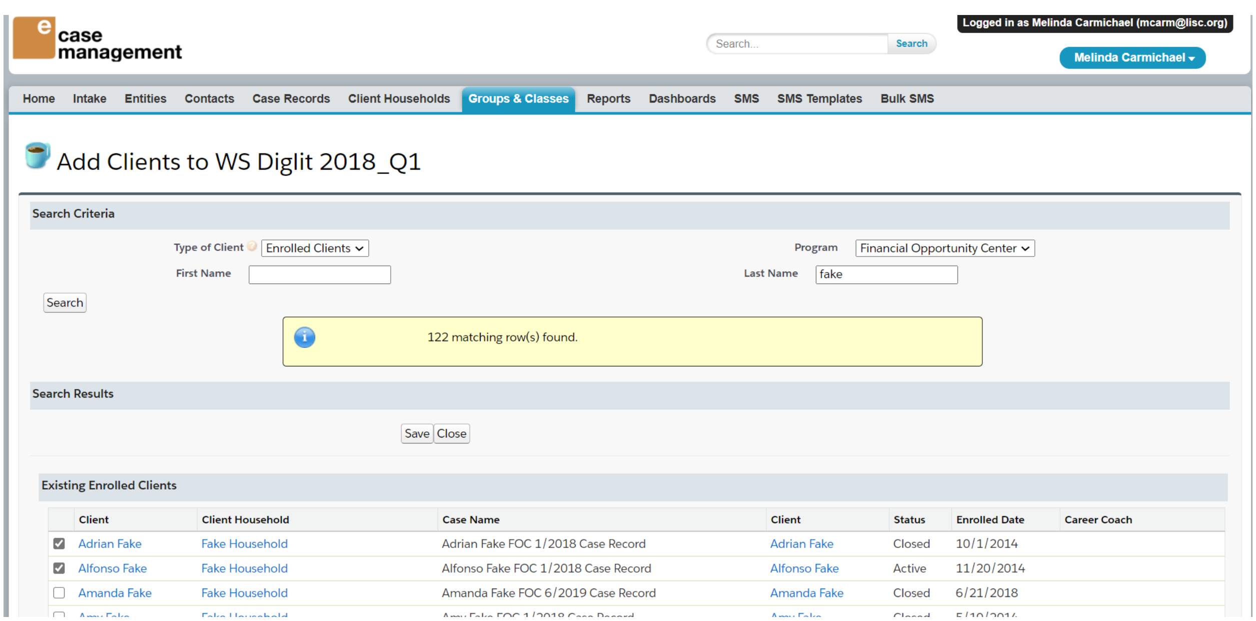
1. Start by selecting the tab "groups & classes from the main menu bar and then click on "new group/class
2. Type in your group name, for this exercise use " RR Diglit 2018" and add your initials at the end group name (note: this is only required in the test site because many people will be creating the same group and you will need to have a unique name)
3. Select "enrolled clients" in the available box and move it to the chosen box.

4. Type “Financial Opportunity Center” for the program; Type “Resource Room” for the Service and type “Breakthrough urban- Test” for the home site. If you are having any issues with any of these, please try clicking on the magnifying glass next to each field, typing the above and click search, then select the item that appears from the search.
5. Click “save” and you have officially created the group



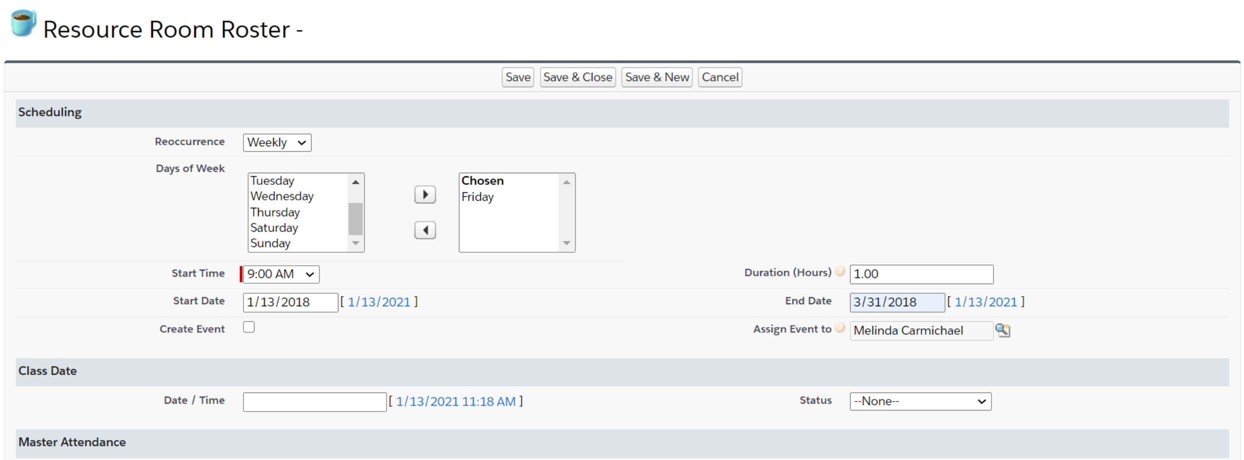
6. Next you will need to add clients to the group. Click on “add client” at the top or the bottom of this record.

   a. Select “Enrolled client” as type of client
   b. Select “Financial opportunity center” for program
   c. Then search you client. You can search either the first name or last name or both. Start by searching your client and click on the check box next to their name and click “save”
   d. Next search for the last name “Fake” and add at least 2 more clients by clicking on the check box by their name and click “save” then “close”

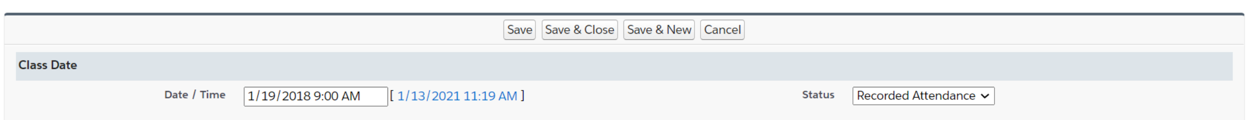


7. Then you will want to schedule the workshop sessions.

a. For this example, we will have open hours every Friday from 1/13/2018 through 3/31/2018 and so are needing to schedule the workshops ahead of time. We can do this by selecting "weekly" for reoccurrence and selecting Friday to move over to the chosen box. Then click "save & close"

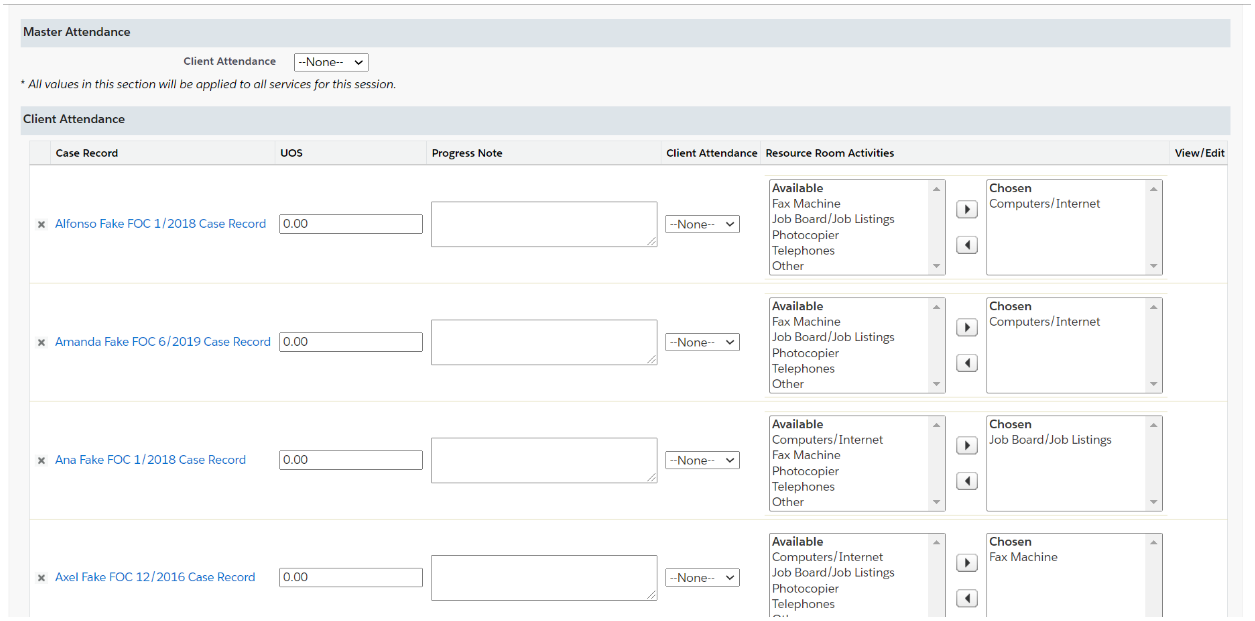


8. When you return back to the main screen for your group, you will see all of your reoccurring sessions and clients enrolled in the class. Select edit on any individual session to "record attendance".



9. Start by updating the status to "record attendance"
10. Then find the client in the list below and select which resource they used that day. If a client from the list did not use any of the resources you and leave their row blank. Selecting "Computer/Internet" will trigger a digital literacy service.

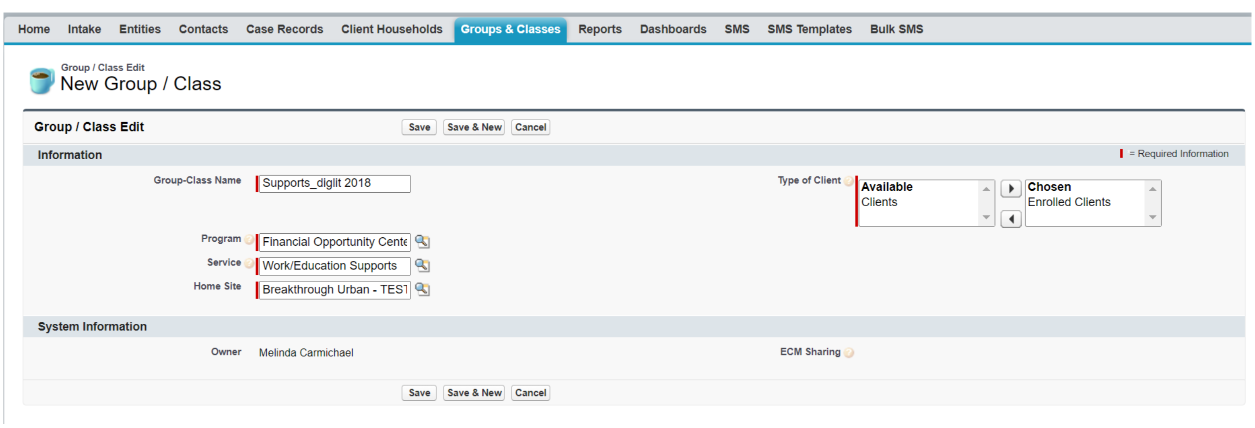
11. Lastly, Save & Close



Work/education support

Work/education support via groups and classes allows for coaches to record supports provided to multiple people on the same day without having to record it through each individual's case record.

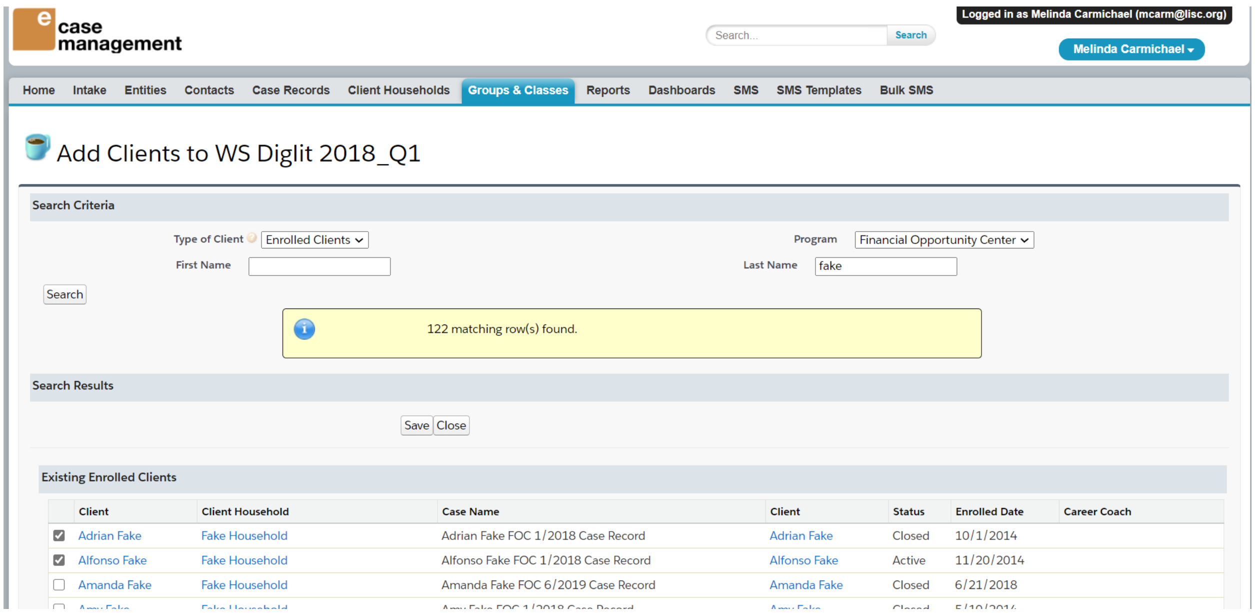
1. Start by selecting the tab "groups & classes from the main menu bar and then click on "new group/class
2. Type in your group name, for this exercise use " Support_Diglit 2018" and add your initials at the end group name (note: this is only required in the test site because many people will be creating the same group and you will need to have a unique name)
3. Select "enrolled clients" in the available box and move it to the chosen box.
4. Type "Financial Opportunity Center" for the program; Type "work/education supports" for the Service and type "Breakthrough urban- Test" for the home site. If you are having any issues with



any of these, please try clicking on the magnifying glass next to each field, typing the above and click search, then select the item that appears from the search.

5. Click “save” and you have officially created the group

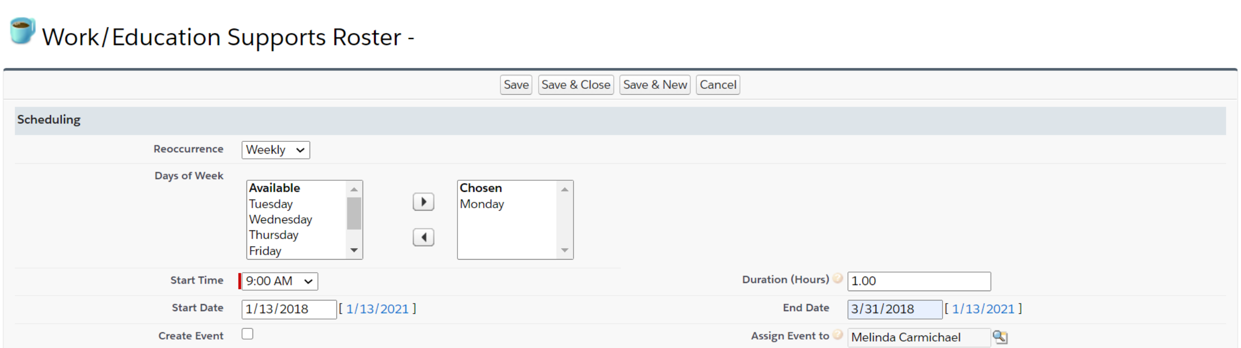
6. Next you will need to add clients to the group. Click on “add client” at the top or the bottom of this record.
    e. Select “Enrolled client” as type of client



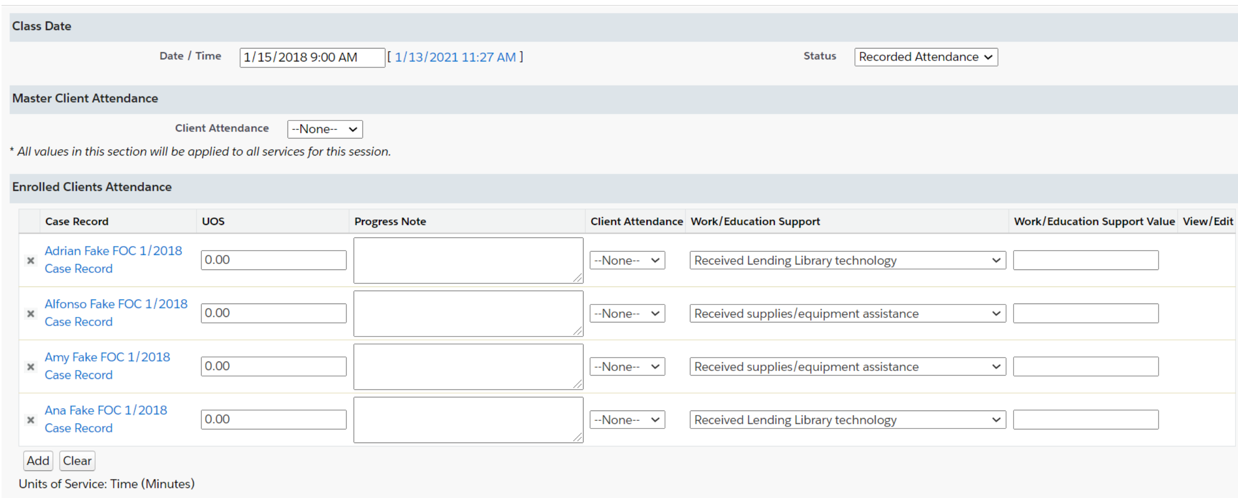
    f. Select “Financial opportunity center” for program
    g. Then search you client. You can search either the first name or last name or both. Start by searching your client and click on the check box next to their name and click “save”
    h. Next search for the last name “Fake” and add at least 2 more clients by clicking on the check box by their name and click “save” then “close”

7. Then you will want to schedule the workshop sessions.

For this example, we will provide supports every Monday from 1/13/2018 through 3/31/2018 and so we are needing to schedule the workshops ahead of time. We can do this by selecting “weekly” for reoccurrence and selecting Monday to move over to the chosen box. Then click “save & close”



8. When you return back to the main screen for your group, you will see all of your reoccurring sessions and clients enrolled in the class. Select edit on any individual session to “record attendance”.
9. Start by updating the status to “record attendance”
10. Then find the client in the list below and select which support was provided to them that day. If a client from the list did not use any of the resources you and leave their row blank. “Received Lending Library technology” will trigger and digital literacy service.
11. Lastly “save and close”



Class Date

Date / Time 1/15/2018 9:00 AM [1/13/2021 11:27 AM] Status Recorded Attendance

Master Client Attendance

Client Attendance --None--

* *All values in this section will be applied to all services for this session.*

Enrolled Clients Attendance

Case Record	UOS	Progress Note	Client Attendance	Work/Education Support	Work/Education Support Value	View/Edit
Adrian Fake FOC 1/2018 Case Record	0.00		--None--	Received Lending Library technology		
Alfonso Fake FOC 1/2018 Case Record	0.00		--None--	Received supplies/equipment assistance		
Amy Fake FOC 1/2018 Case Record	0.00		--None--	Received supplies/equipment assistance		
Ana Fake FOC 1/2018 Case Record	0.00		--None--	Received Lending Library technology		

Add Clear

Units of Service: Time (Minutes)