FFT Salesforce Training Exercise/Guide

Summary:

This is a simulation of how you will use FFT Salesforce to track client outcomes. This exercise is designed to develop your knowledge of the new system. You will enter a fake client and document the situations described in the directions below to the best of your ability.

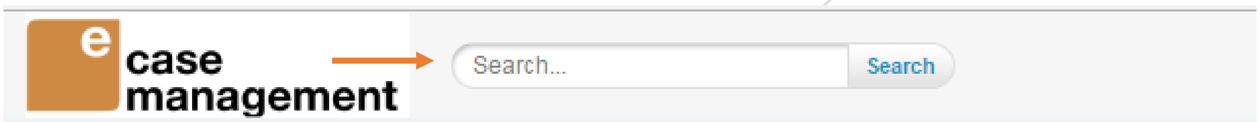
If you are unsure of how to do something in this exercise, please make a note and submit your feedback to fftfocsupport@lisc.org or bring your question to support office hours.

Salesforce Login information:

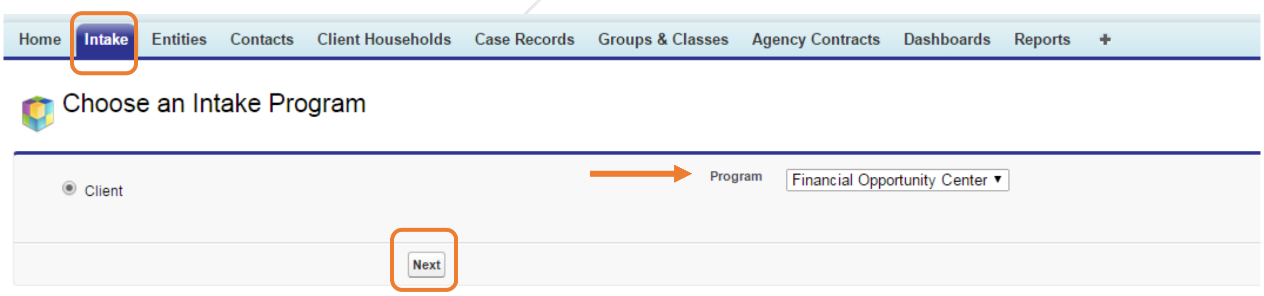
Website: https://partial-lisc.cs62.force.com/partners/login
User Name: usera@lisc.org.partial
Password: Welcome#1

INTAKE:

1. Begin by searching for your test client by name in the database to avoid creating duplicates.

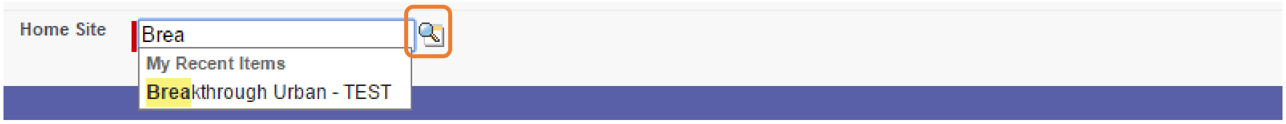


2. Once you have verified your test client is not in the database, proceed to add your client by clicking on the "Intake" tab (make sure to select *Financial Opportunity Center* as the *Program* for enrollment). Click on NEXT.

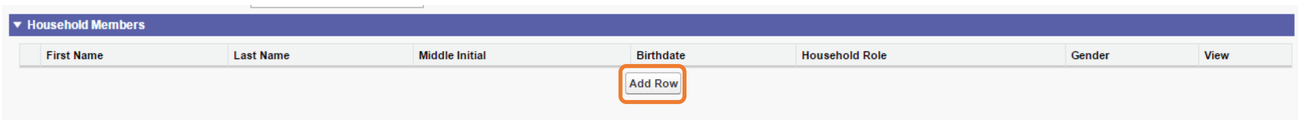


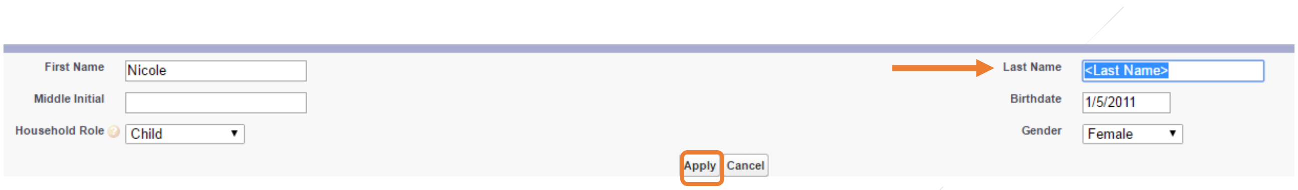
3. You will be directed to the Intake form. Choose a first name for your client and use "Fake" as the last name.
   (1) Complete your client's demographics fields and select the following two options to indicate your client's highest grade completed is **High School equivalency** and is currently **employed part time**.

   (2) Enter 3/15/2019 as your enrollment date and type **Breakthrough Urban-TEST** 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 the site name on the next screen).



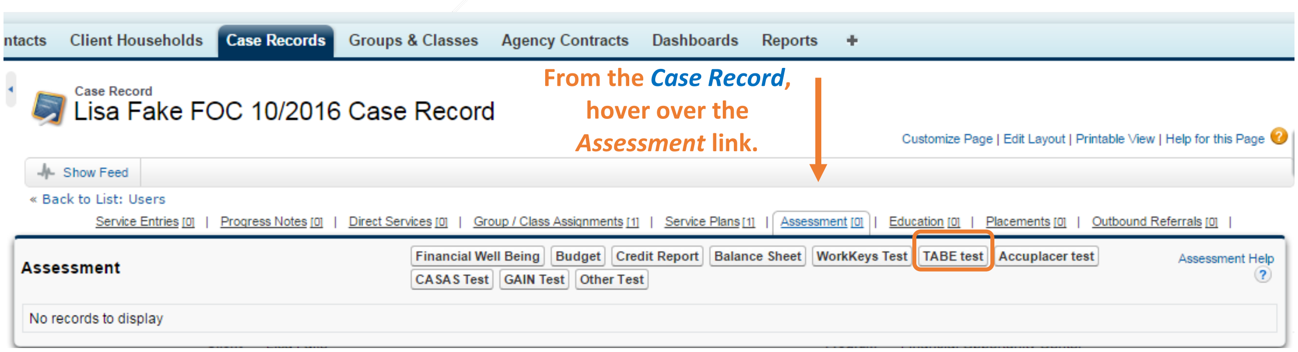
(3) Lastly, add two household members for your client by clicking on the ADD ROW button and entering the applicable information. *Note:* Don't forget to update your client's household member last names. Click on the APPLY button to add your household member.





(4) Once completed, click on the SAVE button to add your new client.

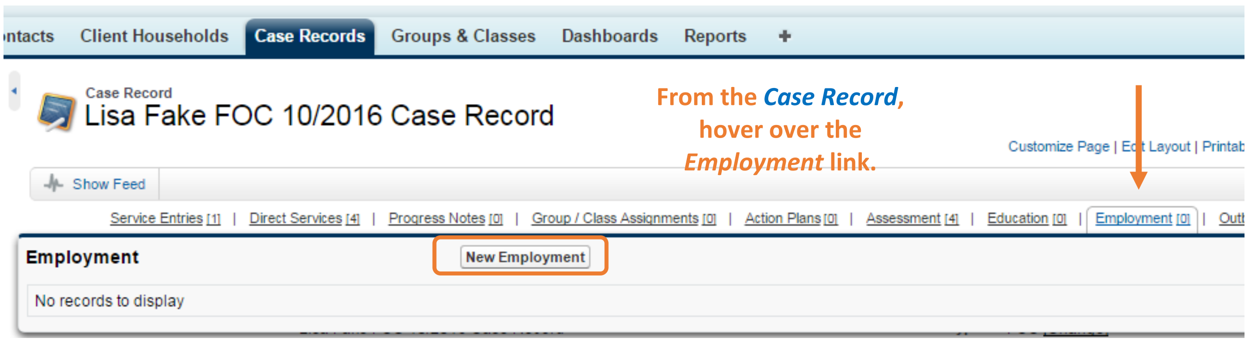
4. A ***Case Record*** is automatically generated for your client, and this will be the place to enter all your client's services. (Your client's household is also automatically generated). From this page, you will enter your client's current employment and education information.
   a. Click on the EDIT button and fill in the *Case Record* with applicable information for your client (i.e. Orientation date, FOC Assigned Staff, etc). Then click on the SAVE button.
   b. As part of the intake process, your client was administered the **TABE,** and you need to document his/her scores. From the Case Record, hover over the Assessment link, and click on the TABE Test button. Enter 3/1/19 as the test date, Stage as Intake/Pre-Test, reading level (D) with grade equivalency of 10.6, and math level (D) with grade equivalency of 8.8. Click on the SAVE button. Note: You may select a different test as applicable to your agency.



5. Employment Record: Click on your client's **Case Record** from your Recent Items box on the left off your screen. (If you do not see your client's case record, you can always search for your client again and click on his/her case record.)

Hover over the Employment link and click on the Employment Record button. Create a new record and indicate the following for your client: has been working 25 hours/week at Rendon Insurance earning $10.25/hour since 10/16/18 as a customer service representative with no health insurance. Make sure to select *Client had this job before enrollment* for this record. Click on the SAVE button.

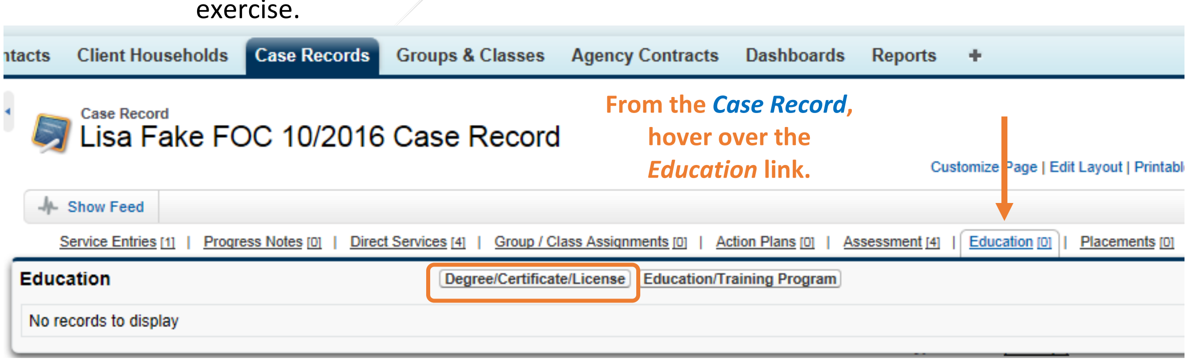
i. **Note:** All companies/entities need to be created in the system prior to creating an Employment Record. We will practice adding a new *Entity* later in this exercise.



6. Degree/Certificate/License Record: Click on your client's **Case Record** from your Recent Items box on the left off your screen. (If you do not see your client's case record, you can always search for your client again and click on his/her case record.)

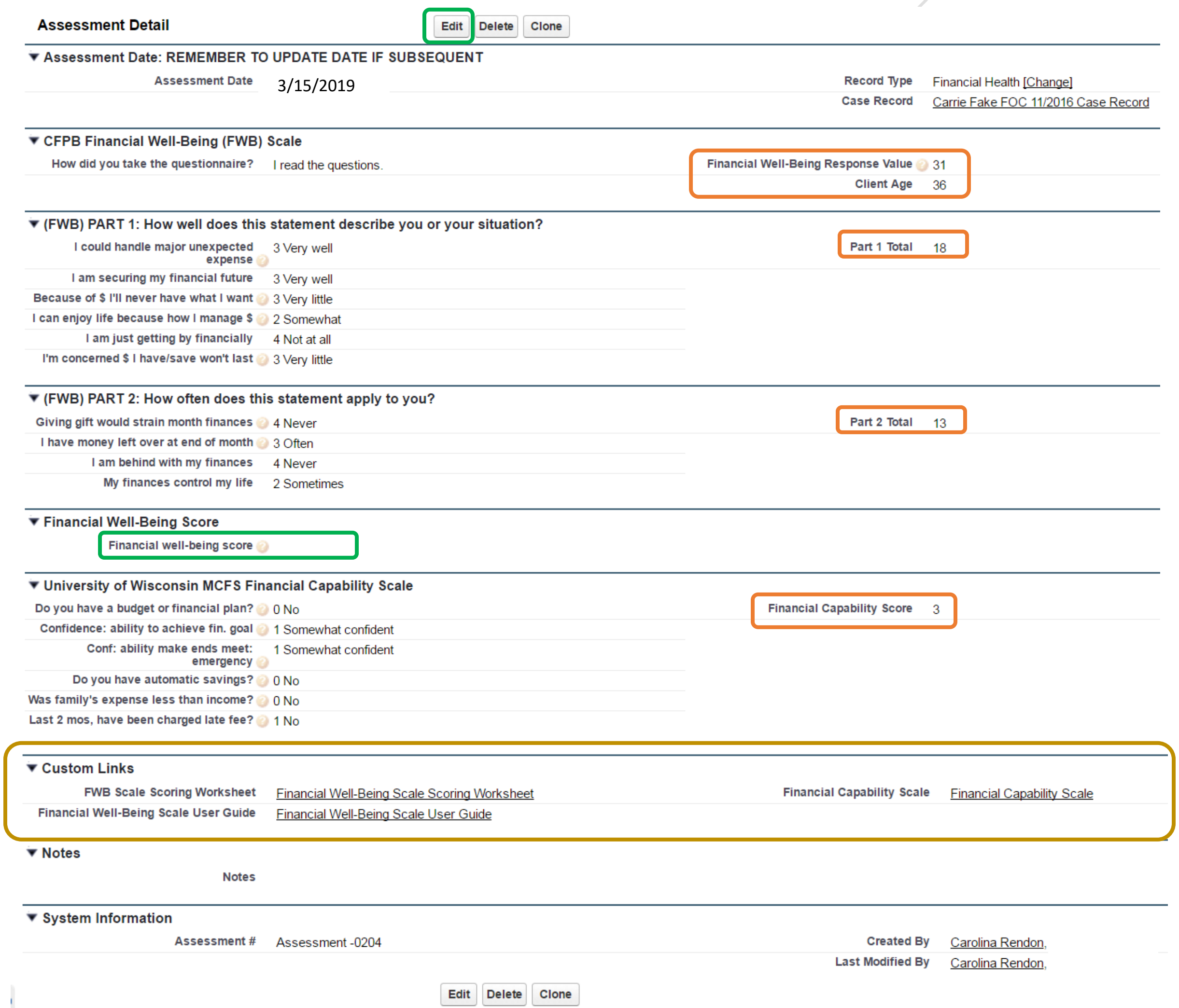
   Hover over the Education link and click on Degree/Certificate/License button. Create a new record and indicate the following for your client: obtained his/her GED from Owens Community College on 8/26/17. . Make sure to select *Client had this credential before enrollment* for this record. Enter the applicable information and click on the SAVE button.

   i. **Note**: All issuing entities need to be created in the system prior to creating a Degree/Certificate/License record. We will practice adding a new *Entity* later in this exercise.



FINANCIAL COUNSELING SERVICES:

1. Document the activities below:
    a. 3/15/19: Click on your client's **Case Record**. Hover over the *Assessment* link and click on each of the financial assessment buttons (which take the place of the Combined Financial Assessment (CFA). Complete each financial assessment for your client using made-up information. Be sure to complete all sections and click on the SAVE button when you complete each assessment.
        i. **Financial Health**: Fill in all of the information on this assessment. You will not be able to fill in the F*inancial well-being score* when first completing the assessment. After you click on the SAVE button, use the *Financial Well-Being Response Value* to calculate the *Financial well-being score* on the *Financial Well-Being Scale Scoring Worksheet*. Click on the EDIT button, fill in the *Financial well-being score*, and click on the SAVE button again.


Assessment Detail Edit Delete Clone

Assessment Date: REMEMBER TO UPDATE DATE IF SUBSEQUENT

Assessment Date	3/15/2019	Record Type	Financial Health [Change]
		Case Record	Carrie Fake FOC 11/2016 Case Record

CFPB Financial Well-Being (FWB) Scale

How did you take the questionnaire?	I read the questions.	Financial Well-Being Response Value	31
		Client Age	36

(FWB) PART 1: How well does this statement describe you or your situation?

I could handle major unexpected expense	3 Very well	Part 1 Total	18
I am securing my financial future	3 Very well		
Because of $ I'll never have what I want	3 Very little		
I can enjoy life because how I manage $	2 Somewhat		
I am just getting by financially	4 Not at all		
I'm concerned $ I have/save won't last	3 Very little		

(FWB) PART 2: How often does this statement apply to you?

Giving gift would strain month finances	4 Never	Part 2 Total	13
I have money left over at end of month	3 Often		
I am behind with my finances	4 Never		
My finances control my life	2 Sometimes		

Financial Well-Being Score

Financial well-being score

University of Wisconsin MCFS Financial Capability Scale

Do you have a budget or financial plan?	0 No	Financial Capability Score	3
Confidence: ability to achieve fin. goal	1 Somewhat confident		
Conf: ability make ends meet: emergency	1 Somewhat confident		
Do you have automatic savings?	0 No		
Was family's expense less than income?	0 No		
Last 2 mos, have been charged late fee?	1 No		

Custom Links

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

Notes

Notes

System Information

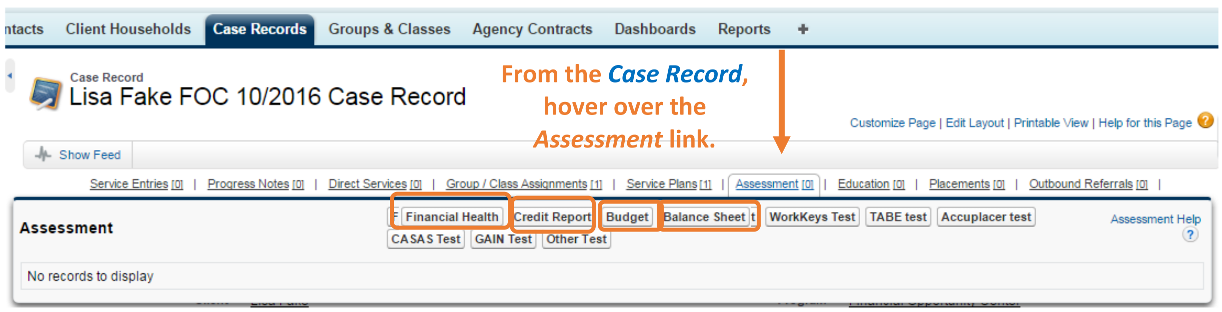
Assessment #	Assessment -0204	Created By	Carolina Rendon,
		Last Modified By	Carolina Rendon,

Edit Delete Clone

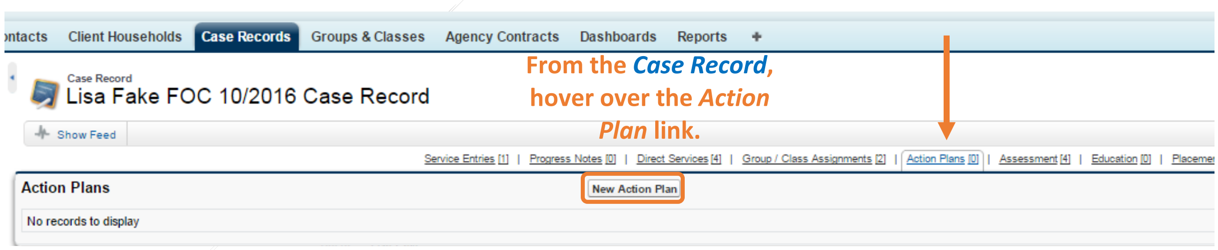
ii. **Credit Report (3/15/19):** Your client has a Transunion FICO credit score of 500, 2 active lines of credit, and there is a collection error of $150.

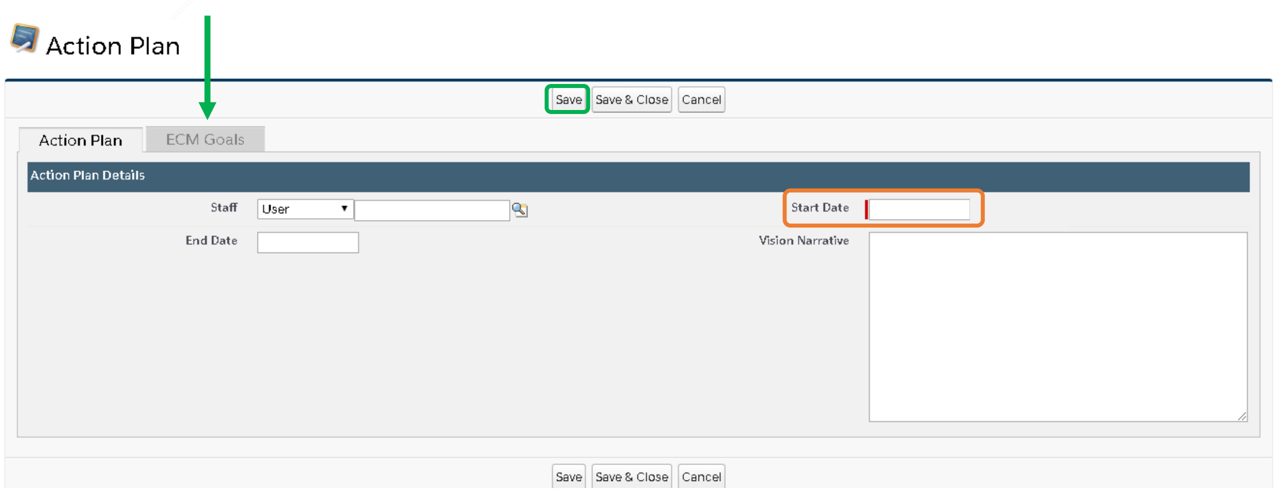
iii. **Budget (3/15/19):** Your client's rent is unsubsidized, so make sure to include a rent amount on the budget and your client is currently receiving SNAP benefits of $320 a month.

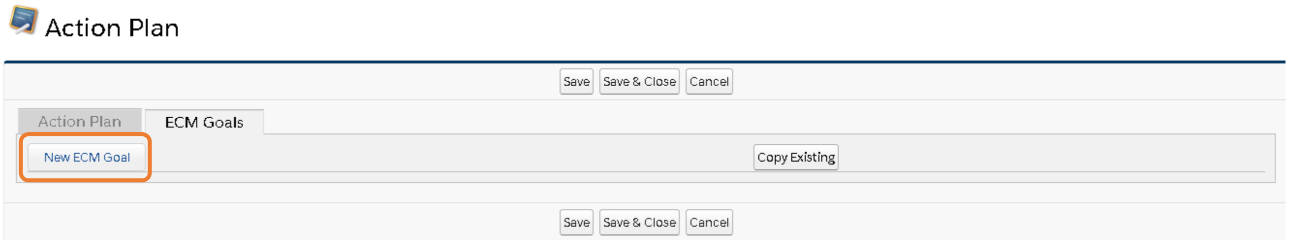
iv. **Balance Sheet (3/15/19):** Your client owes an overdue utility bill of $120, so make sure to include that on the balance sheet.

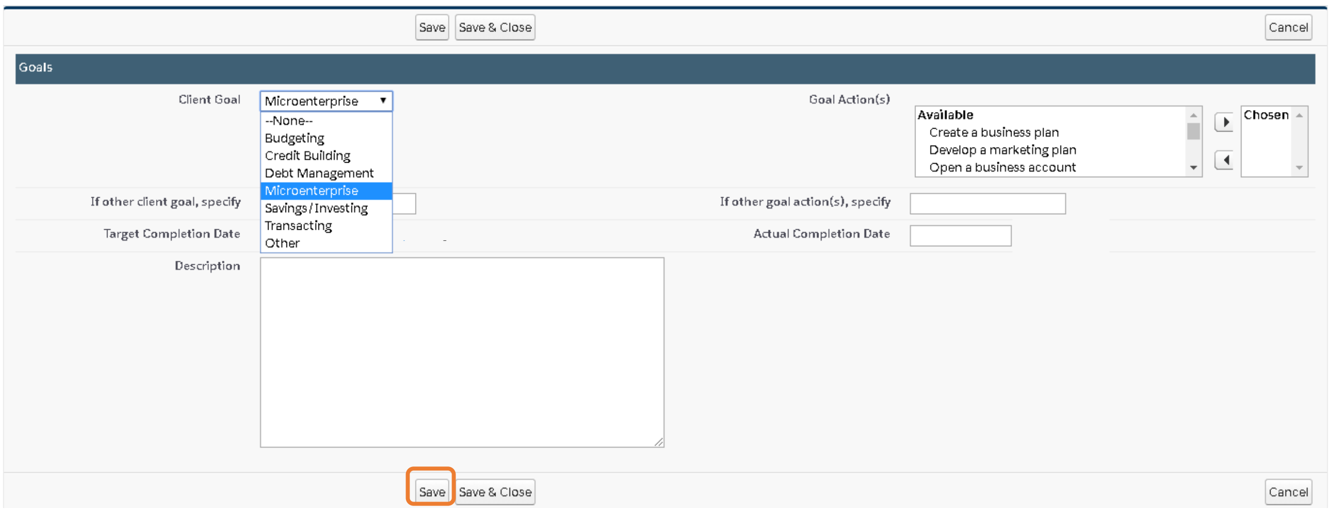


b. 3/15/19: Create an Action Plan (Vision) for your client. Click on your client's **Case Record**. Hover over the Action Plans link and click on the New Action Plan button. Ignore the *Staff* field (this is to be used by someone entering data on someone else's behalf). Enter 3/15/19 as the *Start Date*, and write in a *Vision Narrative* (clients' goals). Click on the QUICK SAVE button. Click on the ECM Goals tab. Click on the New ECM Goal button. Choose a *Client Goal* and at least one *Goal Action*. Fill in the *Target Completion Date*. Click on the SAVE button. Click on the New ECM Goal button again and choose a second *Client Goal*, etc. Click on the SAVE button. You may create as many ECM Goals as you wish.

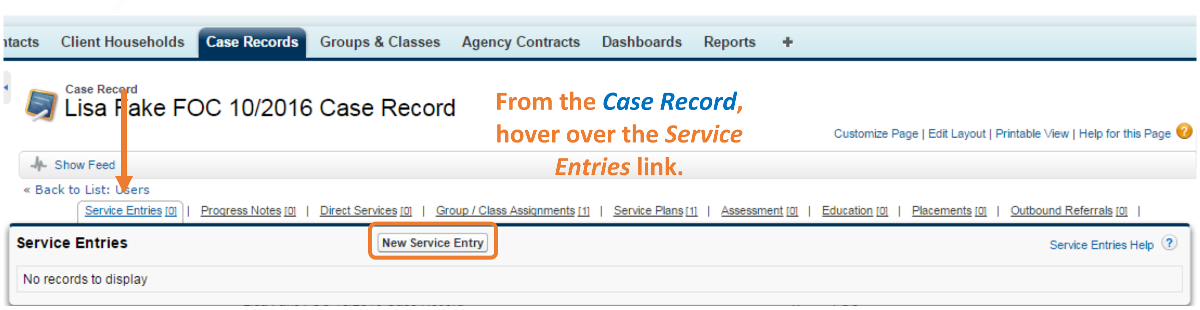


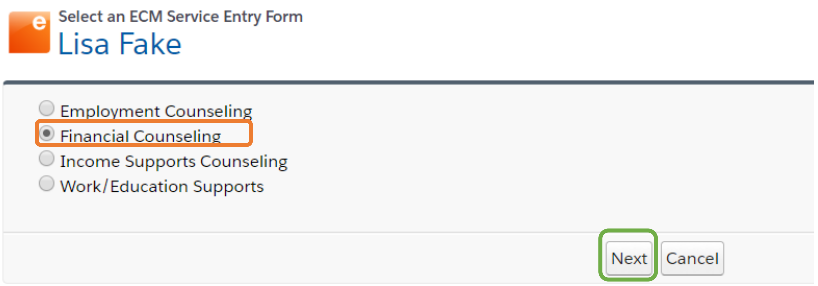




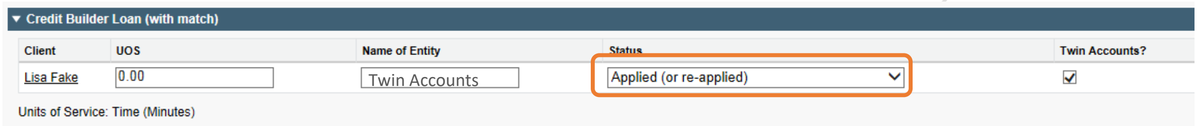


c. 3/15/19: Click on your client's **Case Record**. Hover over the Service Entries link and click on the New Service Entry button. Click on Financial Counseling and click on the NEXT button. Your client comes into the office to discuss his/her family's housing situation. S/he hopes to move his/her family into a new apartment but has had trouble doing so due to poor credit. You recommend a credit builder loan with match. You can ignore the *Staff Person* field, as this is to be used by people entering data on someone else's behalf. Use the arrow next to the topic you want to use (Credit Builder Loan with match) to expand the topic to see all the fields. You may ignore the *UOS* field (unless you want to track how many minutes you spent on each topic). Fill in the *Name of Entity* and *Status* fields, and check off *Twin Accounts* if you are recommending a Twin Accounts loan. The topics are on three pages in Financial Counseling, so you will need to click on the NEXT button at the bottom of the page. To record a note, click on the ADD ROW button at the bottom of the screen. Type your note, and click on the APPLY button. You may use the SAVE & NEW button when adding multiple Service Entries in a row, and you may click on the SAVE button when you are done entering Service Entries.

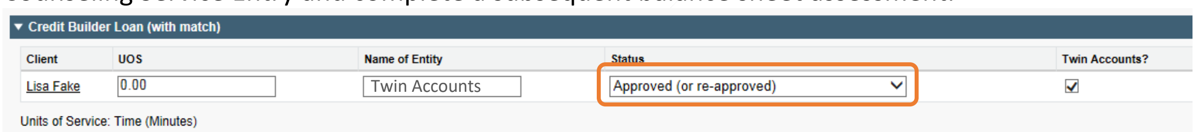




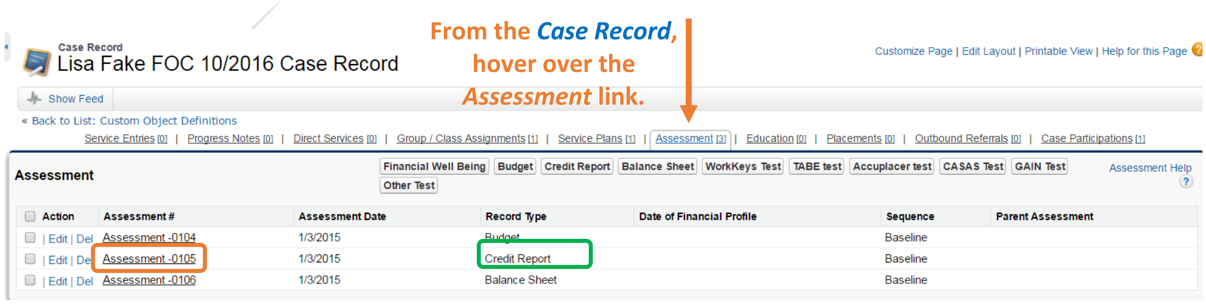
2. 3/27/19: Your client calls you to tell you s/he applied for the credit builder loan with match. Create a new Financial Counseling Service Entry (click on arrow to expand section).



3. 4/10/19: Your client returns to the office and tells you s/he was approved for the credit builder loan with match and he/she has successfully disputed the credit report error. Create a new Financial Counseling Service Entry and complete a subsequent balance sheet assessment.



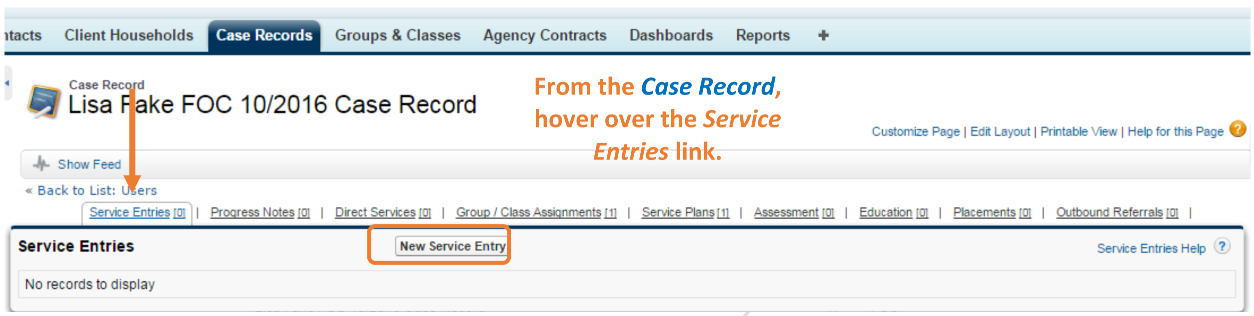
4. 9/23/19: You pull your client's credit to check for improvements. You find that your client's FICO score has improved to 550. Click on your fake client's **Case Record**. Hover over the Assessment link and click on the assessment # you need to update. On the next screen, click on the CLONE button to copy the assessment. Enter the new date, update the necessary information, including the FICO score, and click on the SAVE button.

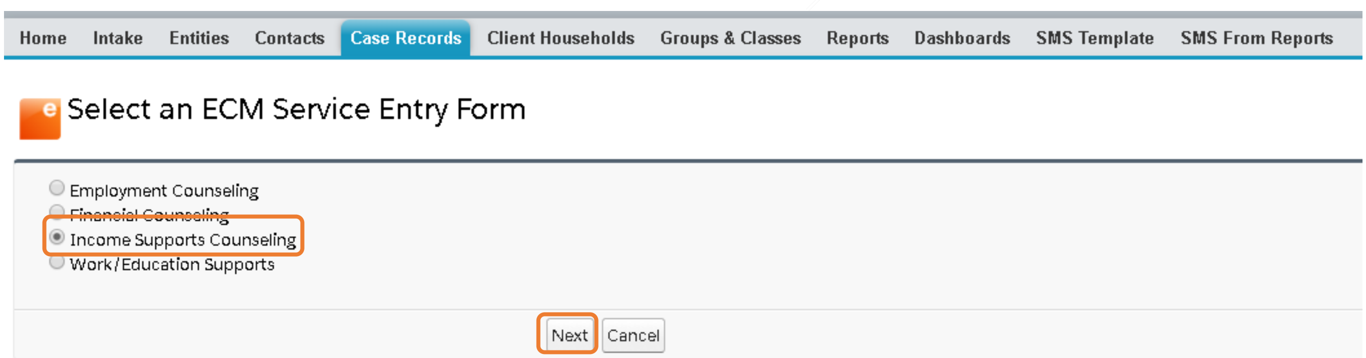


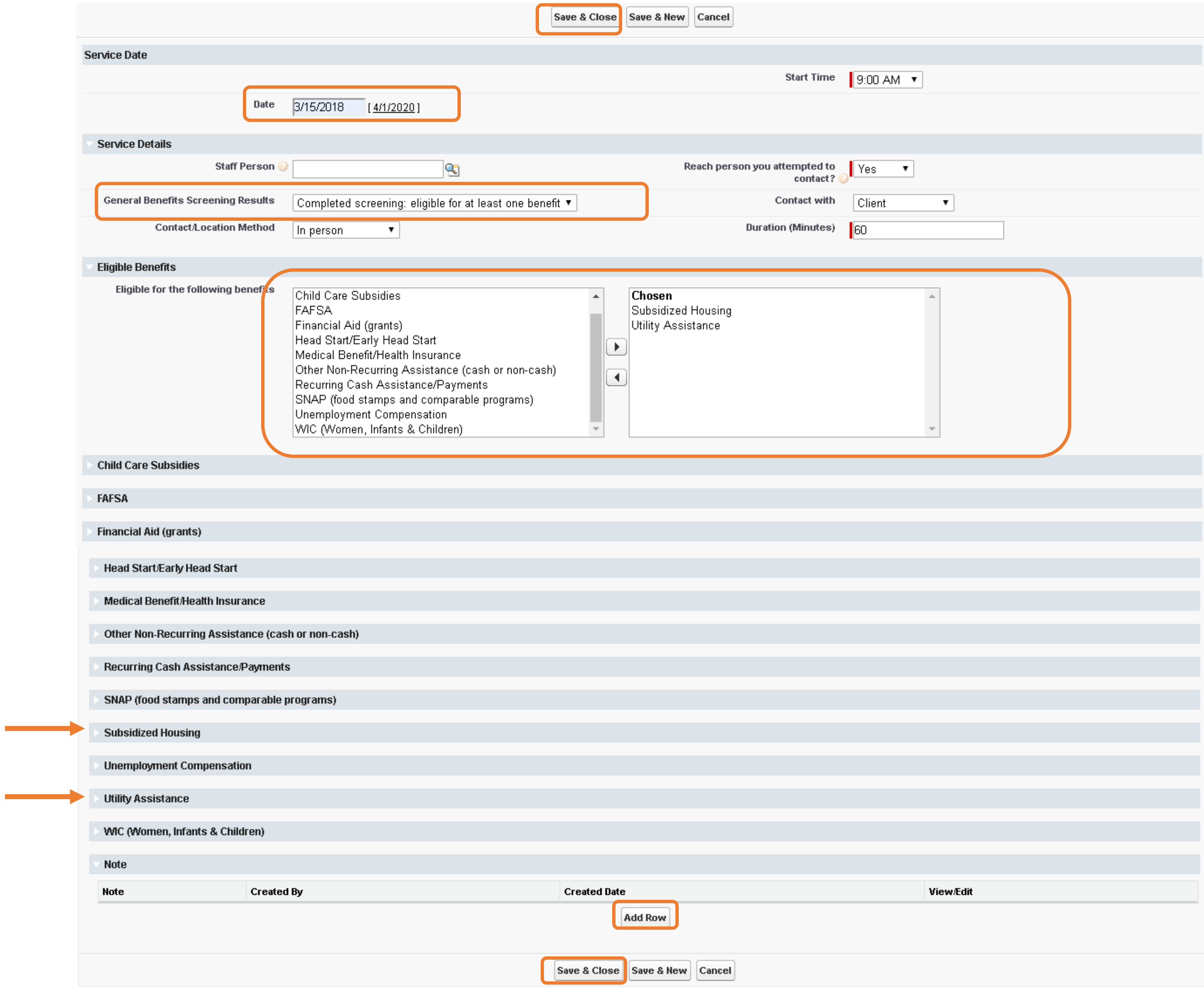
INCOME SUPPORTS COUNSELING SERVICES:

1. Document the activities below:

    a. 3/15/19: You conduct a general benefits screening for your client and find that s/he is eligible for subsidized housing and utility assistance. You help him/her apply for subsidized housing and you refer him/her to another agency for utility assistance. Create a new *Service Entry* for Income Supports Counseling and enter this information. You can ignore the *Staff Person* field, as this is to be used by people entering data on someone else's behalf. Use the arrow next to the topic you want to use to expand the Topic to see all the fields. You may ignore the *UOS* field (unless you want to track how many minutes you spent on each topic).



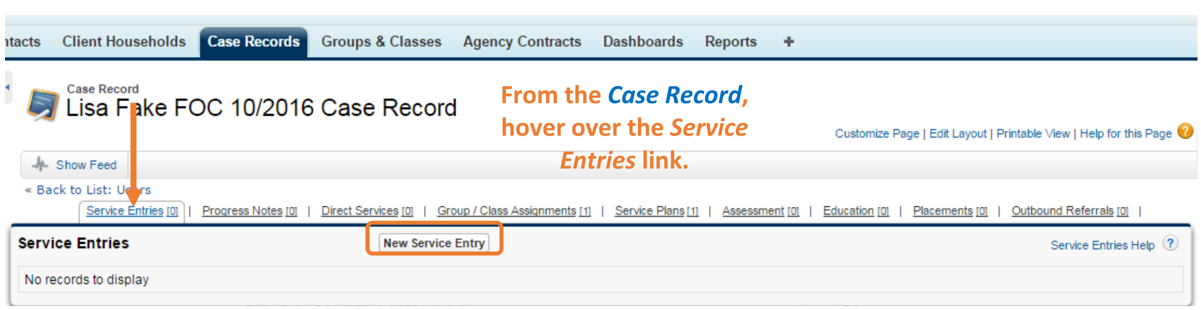




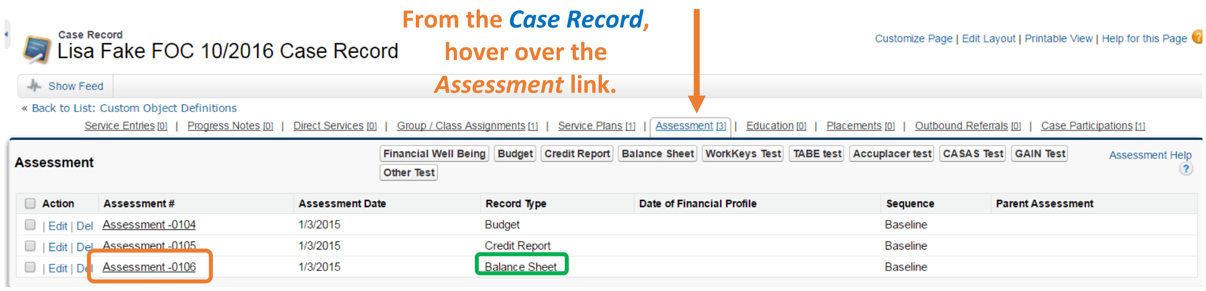
Note: Click on arrow to expand sections.

b. 4/15/19: Your client calls you to tell you s/he has received one-time utility assistance for $350.

   i. Enter a Service Entry to update the Utility Assistance topic.



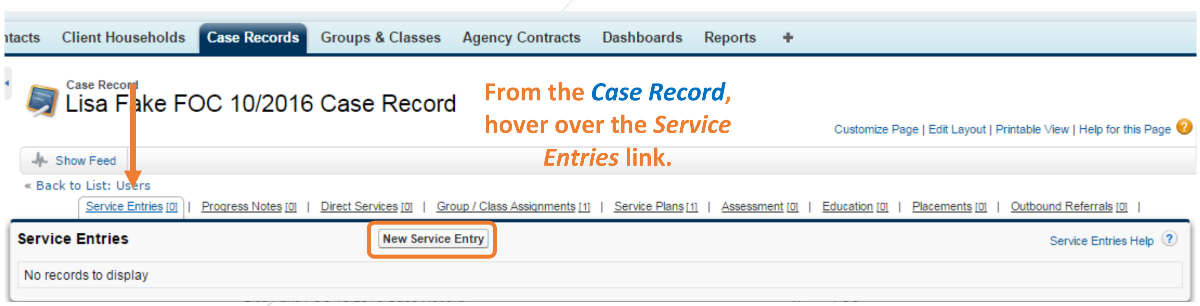
ii. Update the balance sheet with the utility assistance. Hover over the Assessments link, and click on the Assessment # next to the most recent Balance Sheet. On the next screen, click on the CLONE button to copy the assessment. Enter the correct date, update the necessary information to reduce the utility liability.

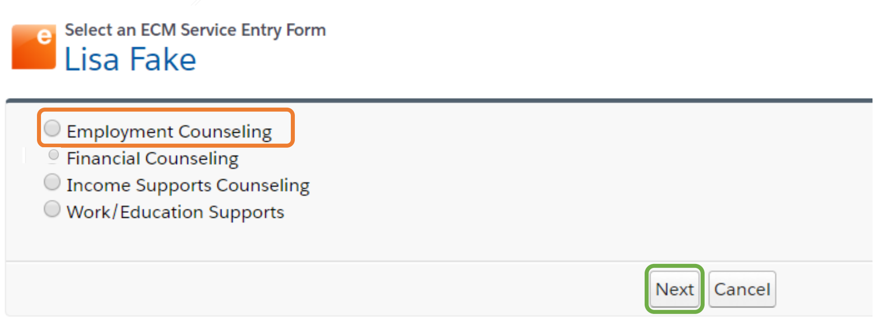


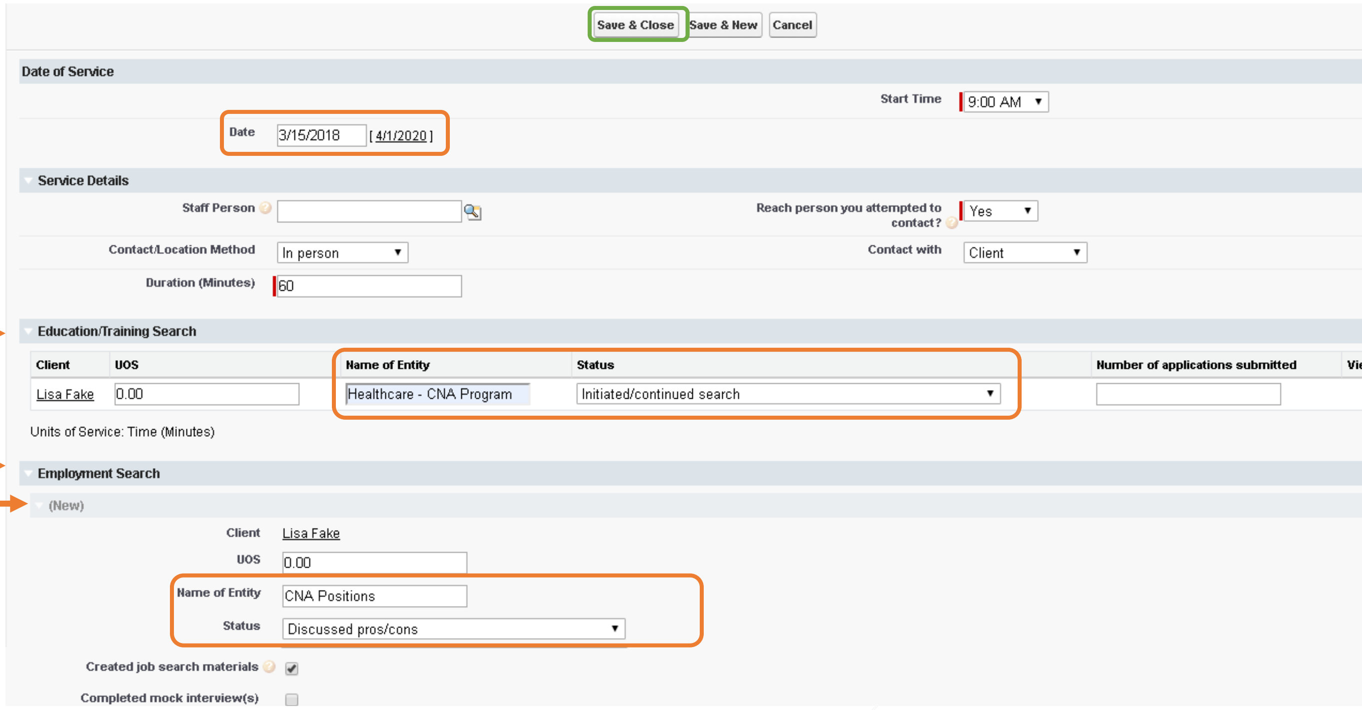
EMPLOYMENT COUNSELING SERVICES:

Document the activities below:

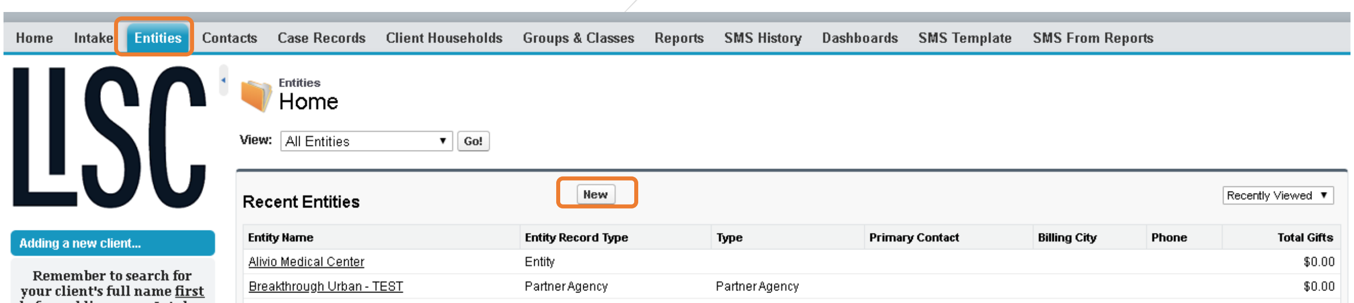
a. 3/15/19: You meet with your client to assess his/her strengths and needs. You help him/her start his/her search for a vocational training program and show her/him the job growth outlook for the industry. Record a new Service Entry for Employment Counseling and indicate you helped the client updated his/her resume (job search materials). You can ignore the *Staff Person* field, as this is to be used by people entering data on someone else's behalf. Use the arrow next to the Topic you want to use to expand the Topic to see all the fields. You may ignore the *UOS* field (unless you want to track how many minutes you spent on each topic).

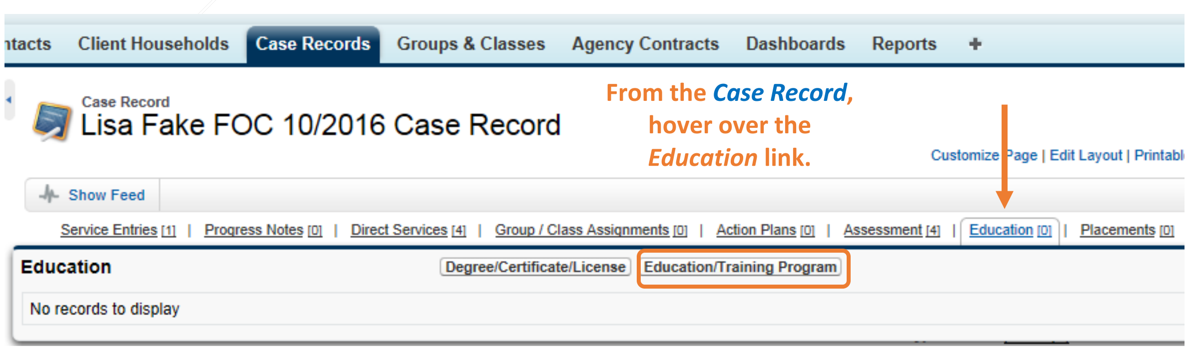






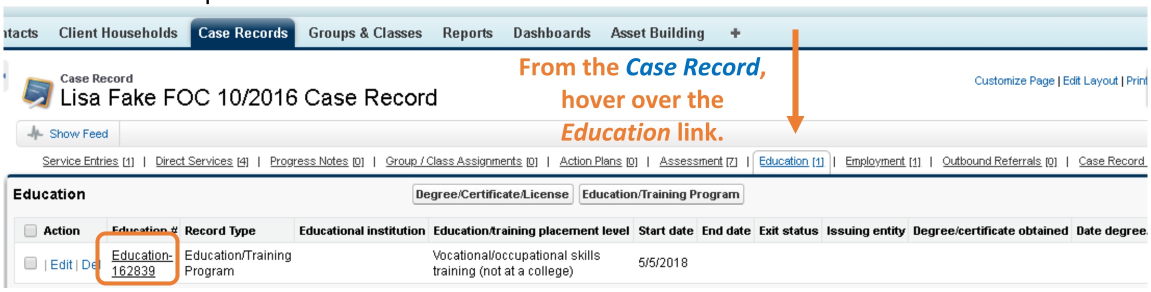
b. 4/20/19: Your client calls to say that s/he has enrolled in a 8-week CNA program at a community based organization called "your last name" Vocational Community Center starting on 5/5/2019. Create a new "Education/Training Program" record to document this training program. **Note:** You will need to create a new "Entity" before you can document this education record.



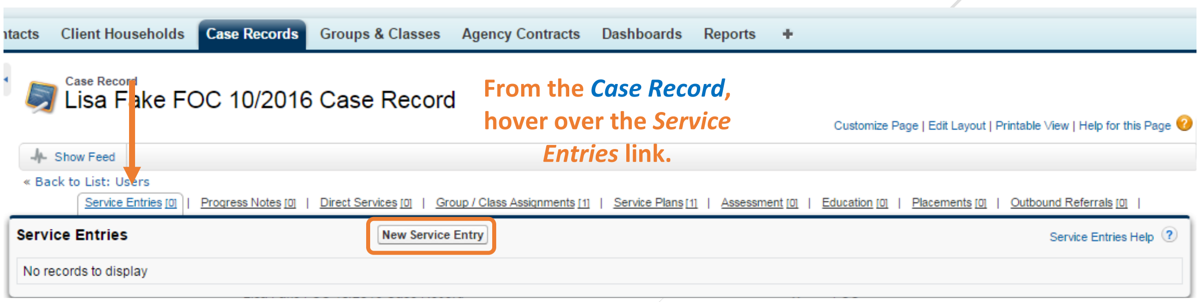


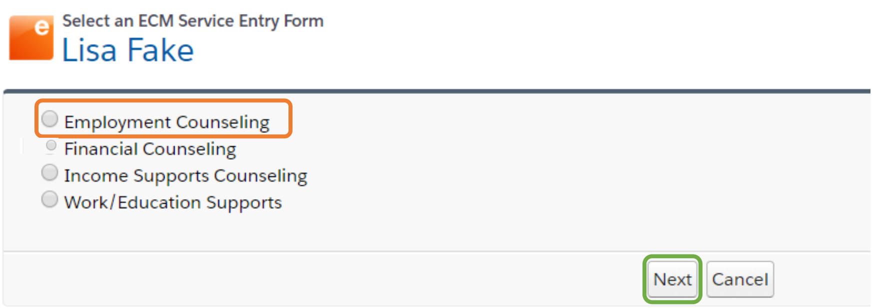
c. 7/7/2019: Your client comes into the office to let you know s/he has completed the training program and will be taking the state exam in the next two weeks. She also tell you s/he has a job lined up at a nursing home as a “Nursing Assistant” and upon receiving the certification she will receive a promotion to “Certified Nursing Assistant” . Document the following updates:

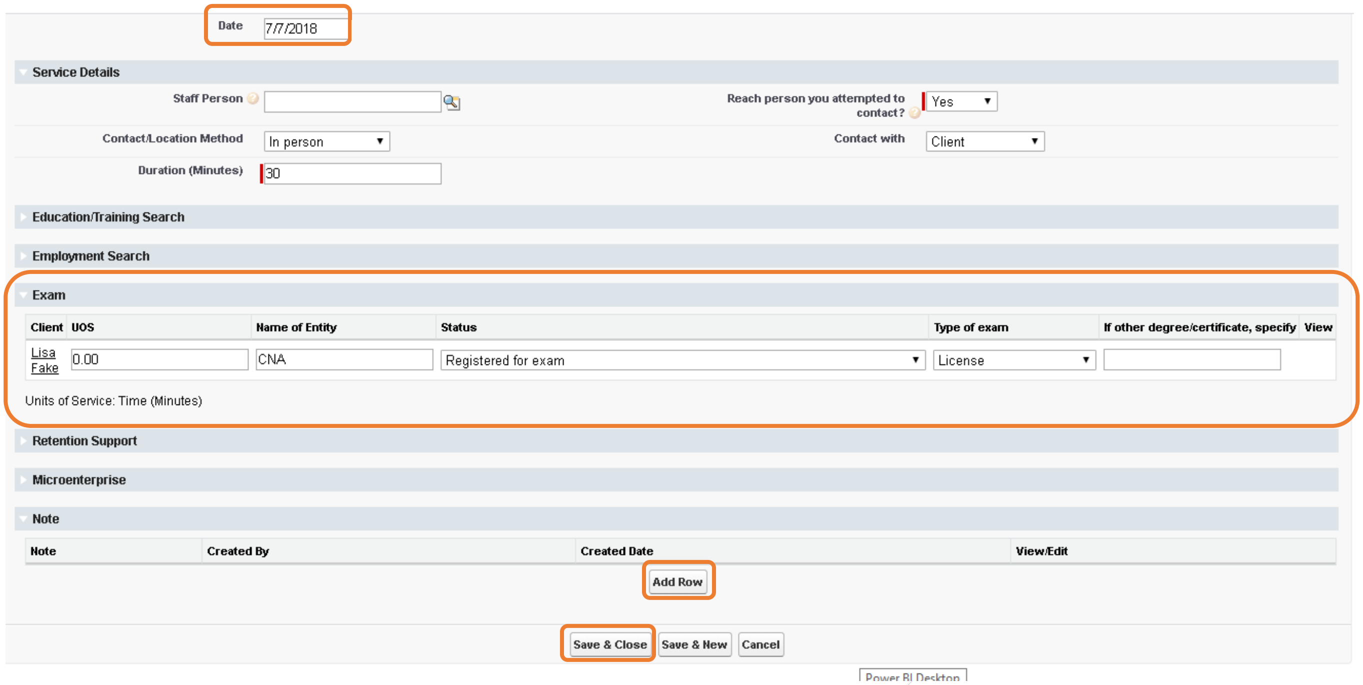
1. Close the **education/training program** with an end date of 7/5/2019 and a successful completion.



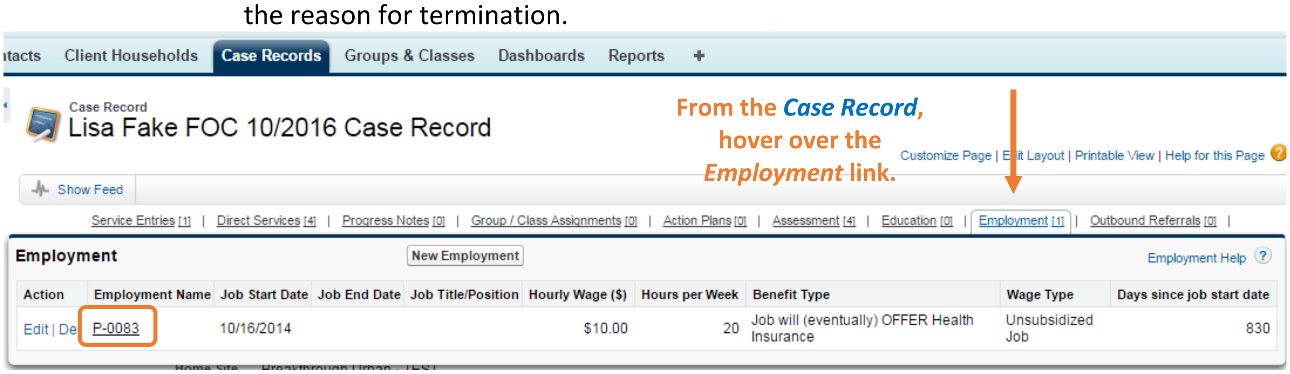
2. Create a new **Service Entry** to document the state exam registration status with a contact date of 7/7/2019 and click on “Add Row” to document your case note.

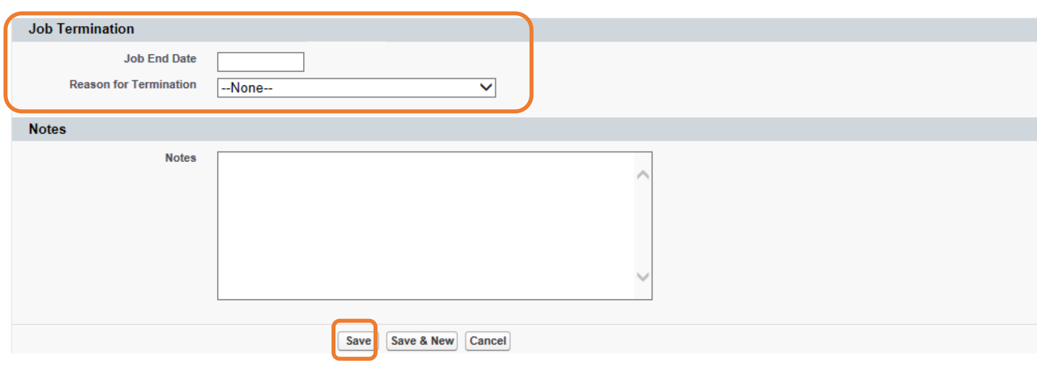




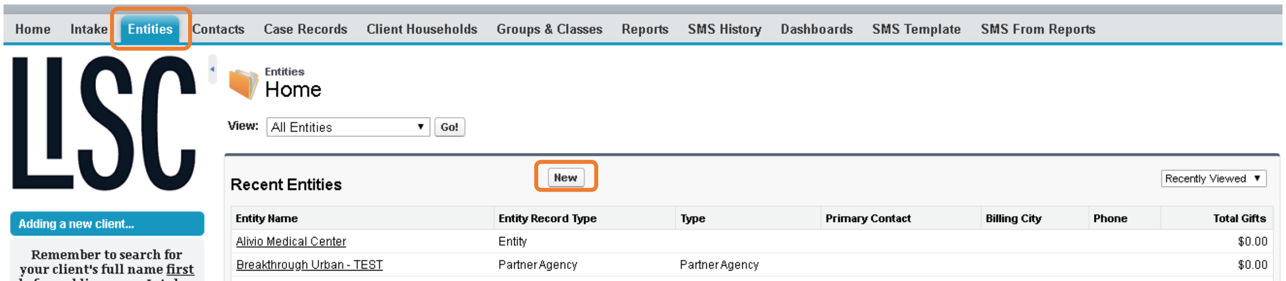


3. Terminate the current **employmen**t record with the date of 7/7/018 and select "quit" as the reason for termination.

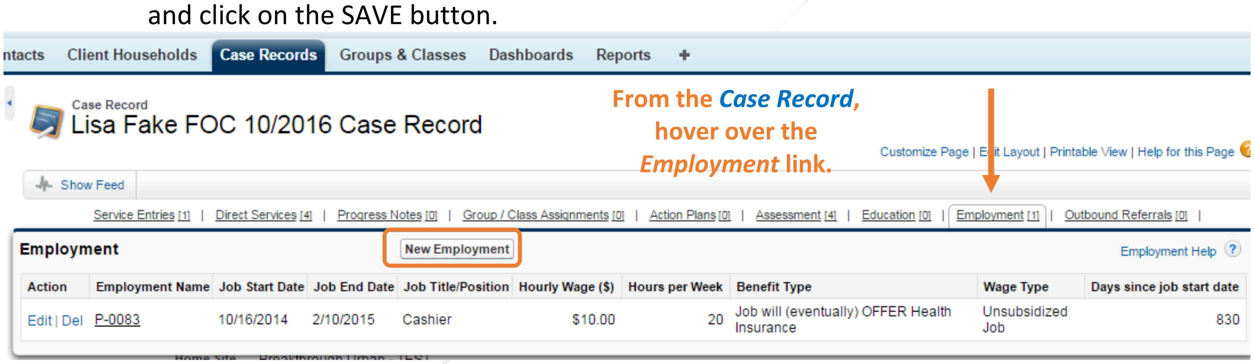




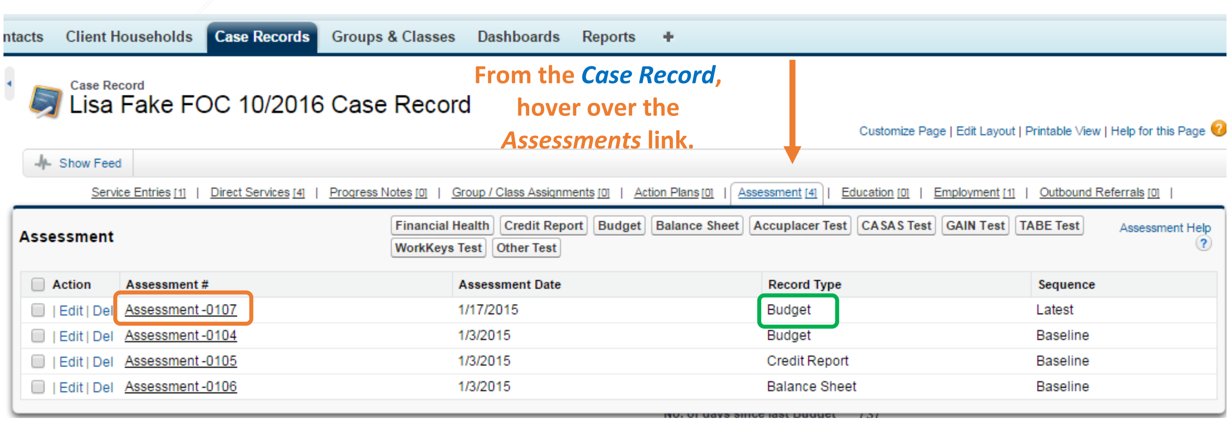
4. Create a new **Entity** record for “your last name” Nursing Home.

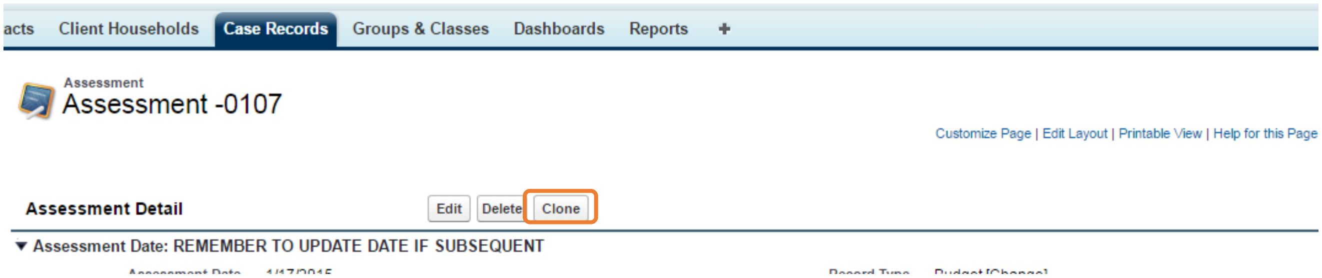


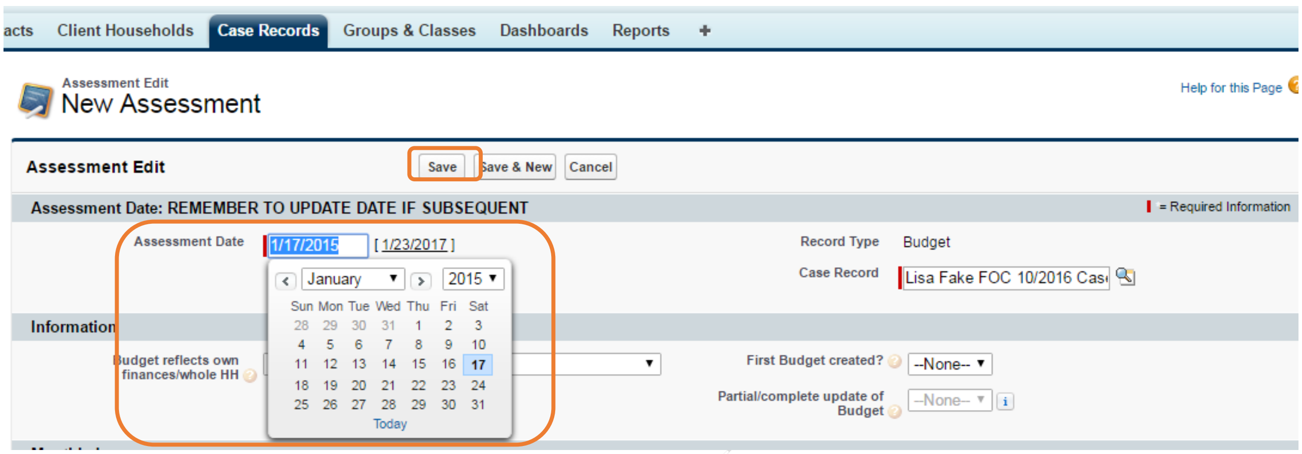
5. Create a new employment record by hovering over the Employment link and click on the New Employment button. Enter your client’s new Employment Placement at [your last name] Nursing Home as a nursing assistant working 40 hours/week at $12.00/hour. The job start date is 7/9/19. The new job will offer health insurance after 90 days, so select Job will (eventually) OFFER Health Insurance in the *Benefit Type* field. Fill in the applicable data and click on the SAVE button.



d. Update the budget with this new information. Hover over the Assessments link, and click on the Assessment # next to the Budget. On the next screen, click on the CLONE button to copy the assessment. Enter the correct date, update the necessary information, including the updated wages, and click on the SAVE button.

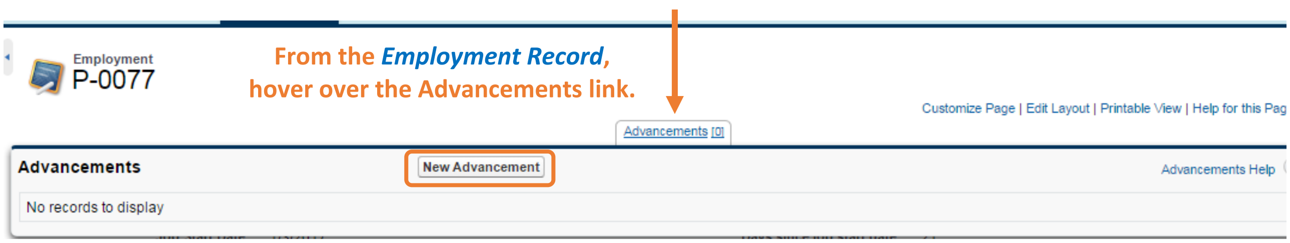


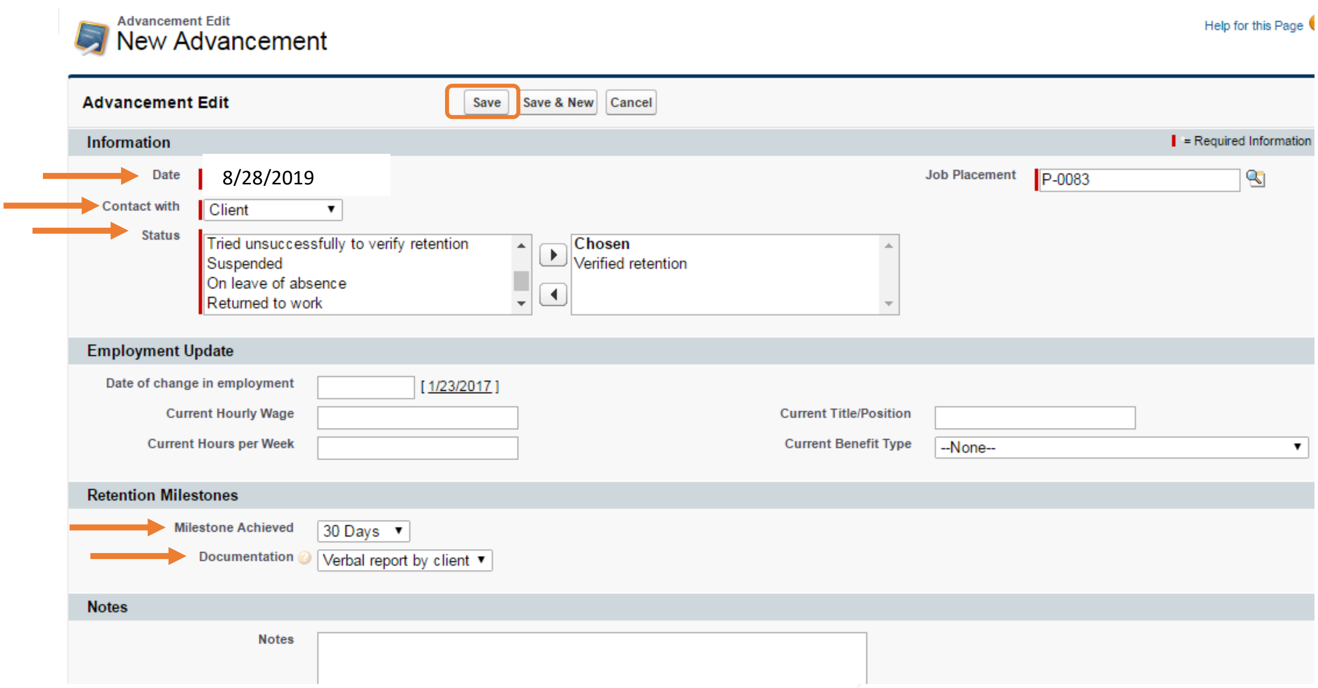




i. Note: Make sure to update the date and click on the SAVE button once the update is complete.

f. 8/28/19: You call your client to see how the first month of work has gone. The client says all is going well. Record a retention update for your client by adding an *Advancement* to the Employment record.

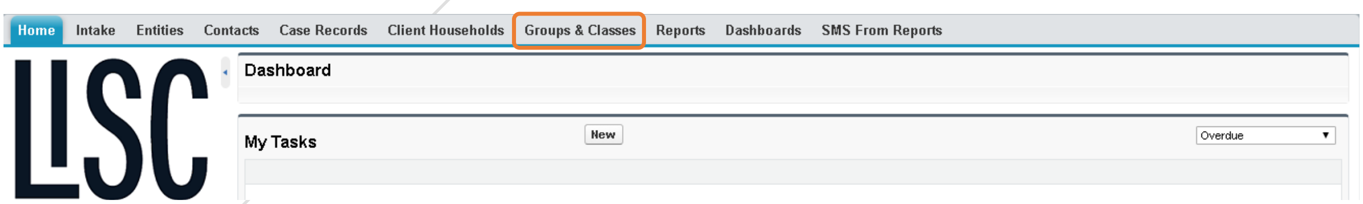




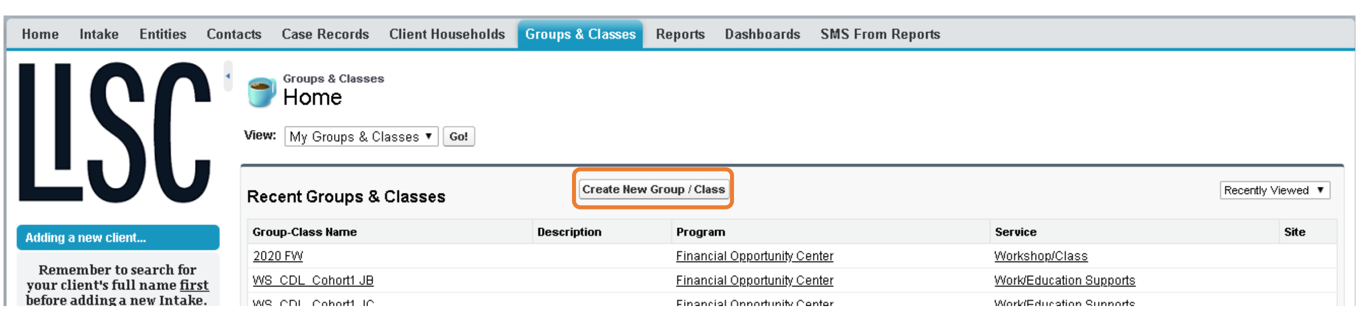
1. 10/27/19: You call your client to see how the first 90 days of work has gone. You leave a voicemail for your client requesting a return call with an update. Click on your client's **Case Record**. Click on the RECORD SERVICE button, select Employment Counseling, and click on the NEXT button. Fill in the appropriate information and mark that you did not reach the person you attempted to contact. Add a note at the bottom of the screen by clicking on the ADD ROW button, writing your note, and then clicking on the APPLY button. Click on the SAVE button.

Groups and Classes

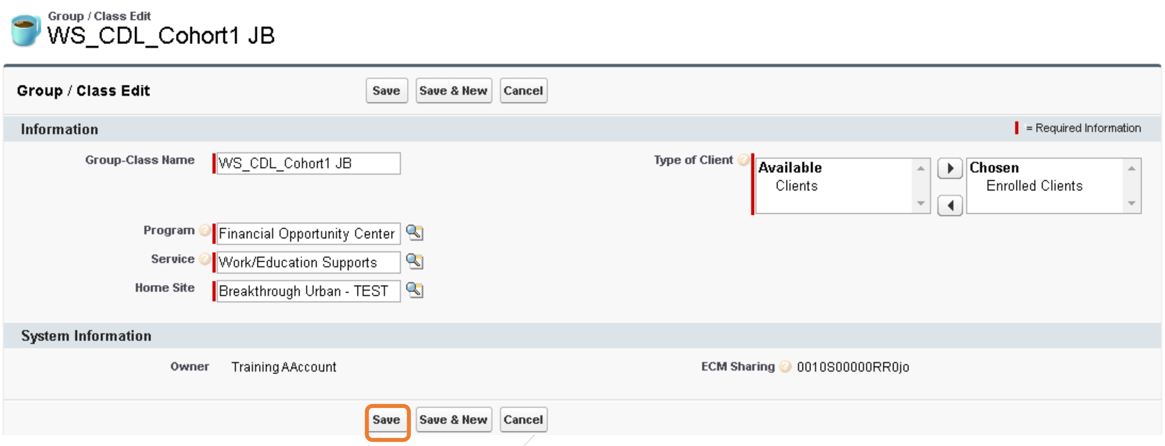
1. Click on the Groups & Classes tab on the top of the main page.



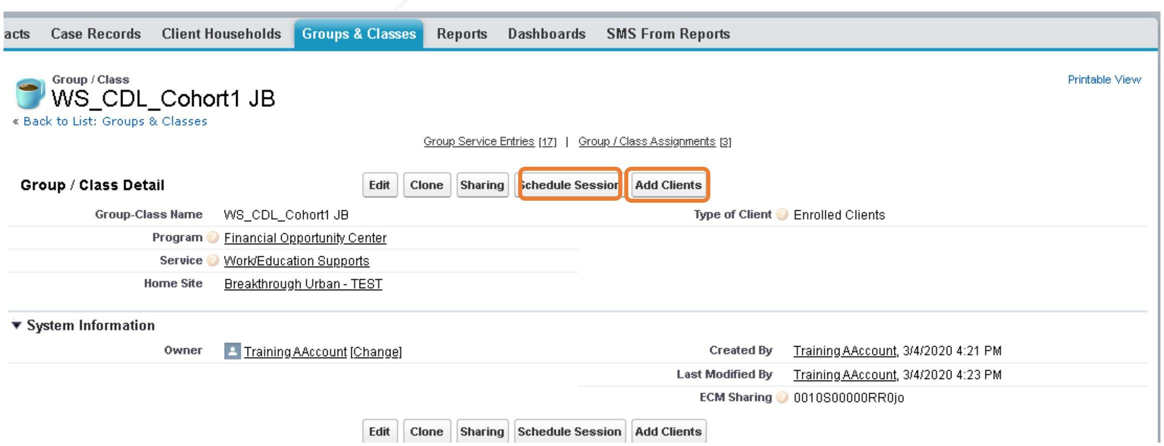
2. A list of all Groups & Classes that already exist will appear. You can click on any to edit or select "Create New Group/Class".



3. Fill in the applicable information:
    a. **Group Name:** Here you will name your group/ class or workshop. Best practice would be to have a uniform naming structure in your organization. Ask your supervisor first to learn if one already exist. Group Name example: Program code_Month_Intials.
    b. **Program:** Type in/Select "Financial Opportunity Center"
    c. **Service:** Select either Workshop/class, Resource Room Activities, or Work/education Support
        i. For **Accenture** workshop tracking please user "Workshop/Class"
    d. **Home Site:** Type in/Select your home site name here
    e. **Type of Client:** Enrolled Clients are clients that are enrolled and have a case record in the FOC program. Clients do not have an FOC case record, this may include people who dropped into the class but have not been enrolled into the FOC. It is recommended that you only use groups/classes to track FOC enrolled clients.
    f. Click “Save”

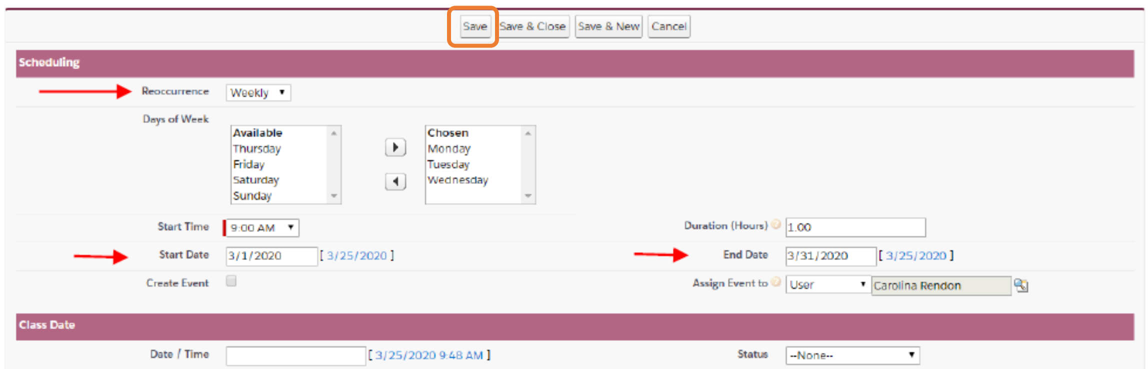


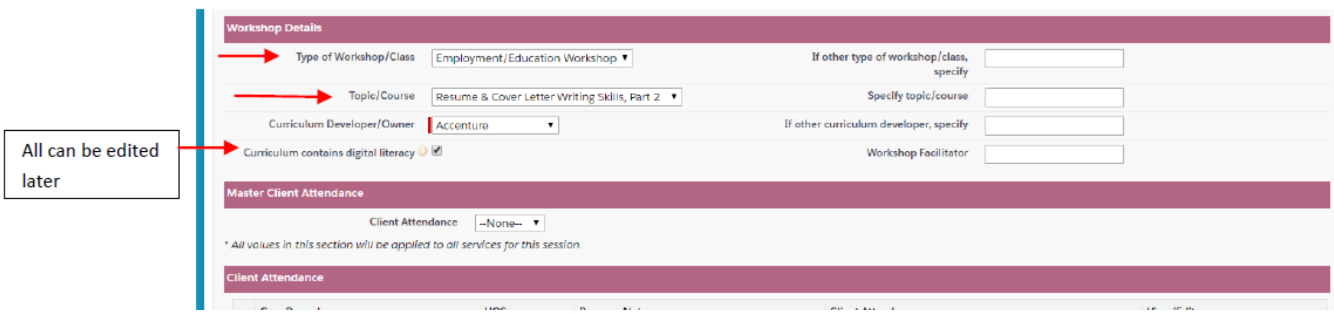
4. After you save, you will see your main screen for the group/class you have just created. Now you will want to Schedule Classes, Add Clients and Record Attendance.



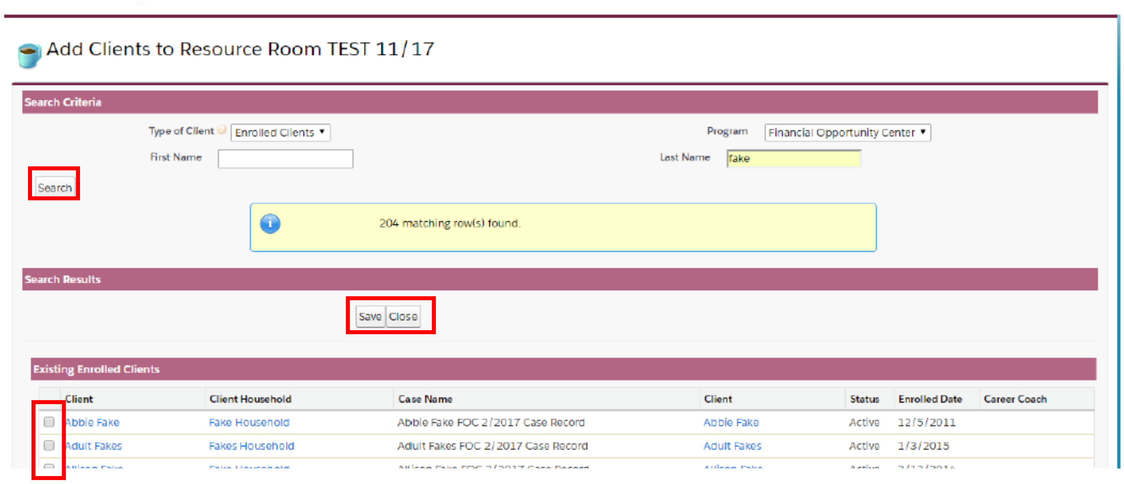
5. Schedule sessions: Click on Schedule session on the main group screen. Here you can schedule classes that have passed or in the future.
    a. The reoccurrence option will allow you to easily schedule multiple classes that repeat weekly or monthly or example.
    b. Select a start and end date for your reoccurring class
    c. Choose Type of class, ex. Digital literacy or financial workshops

d. Choose Topic/Class. If your topic changes every week, select any and you will be able to edit individual classes later
e. If your workshop contains any digital literacy skills lessons, please check off "curriculum contains digital literacy"; E.g. A Financial workshop on "Banking" may discuss "Online Banking" and show clients how that works or an Employment workshop on "Resume Writing" may also be an "Introduction to Microsoft word".
f. Click "Save"

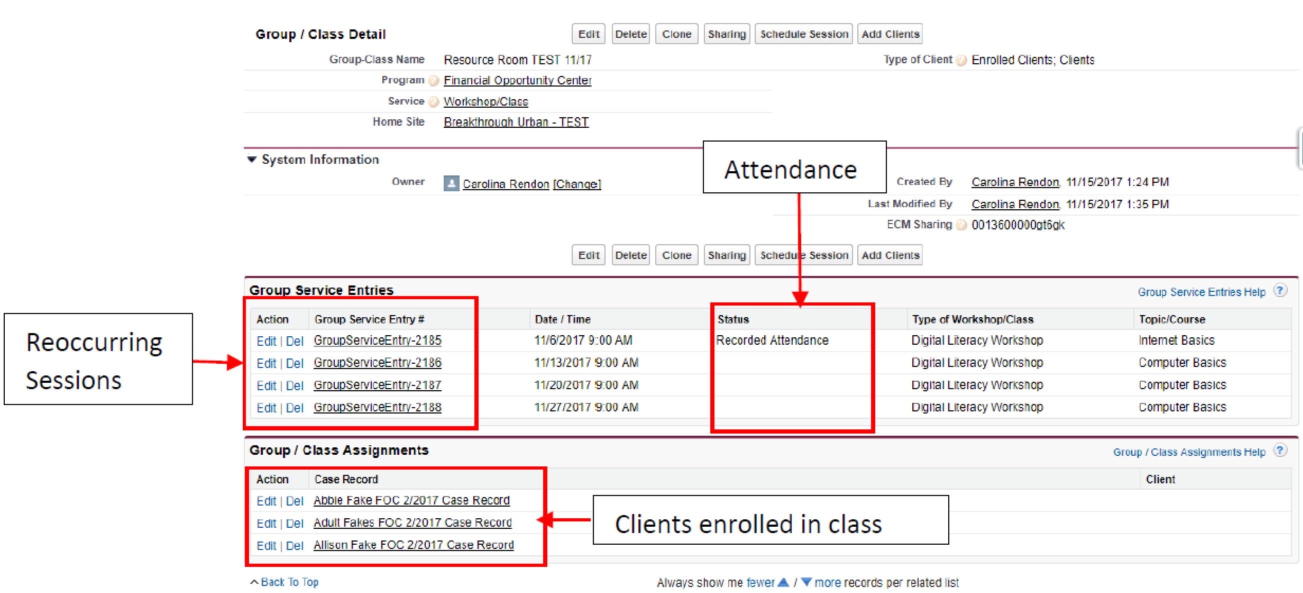




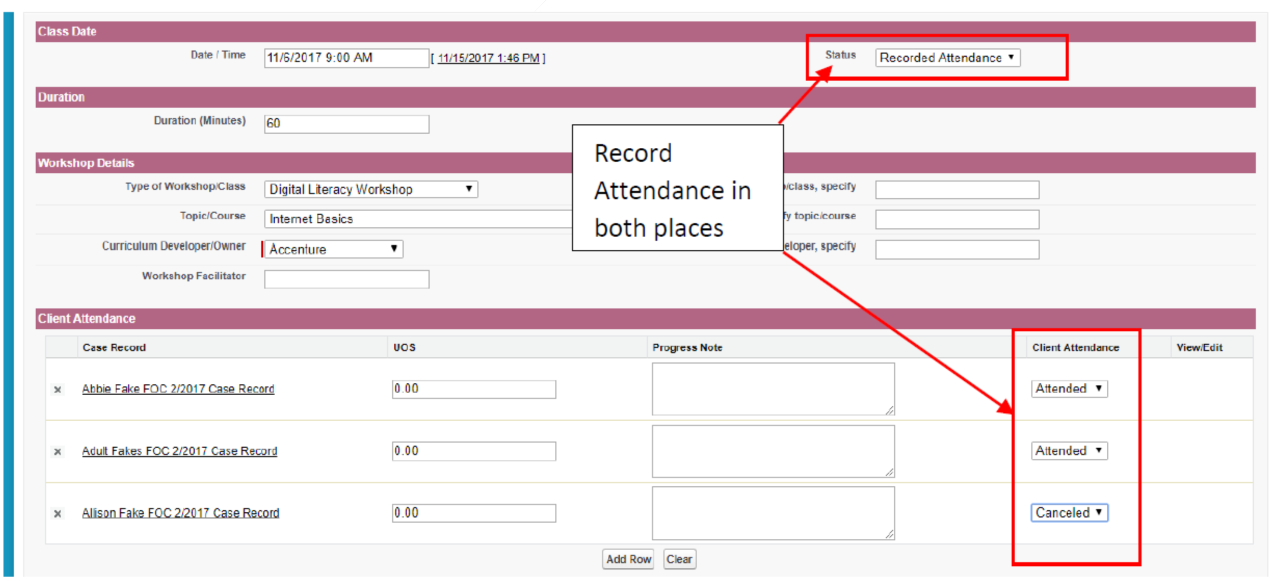
6. Add Clients: Now that your classes are scheduled you can add students who are enrolled in the class by clicking ADD Client on the main screen.
   a. Select "Type of client" (Enrolled or client) and select program "Financial Opportunity Center"
   b. Search by first/ last name or both and select and save clients into group.
      *** Remember to click save before you move on to a new search.
   c. Check-off the clients you would like to add and click SAVE; Close



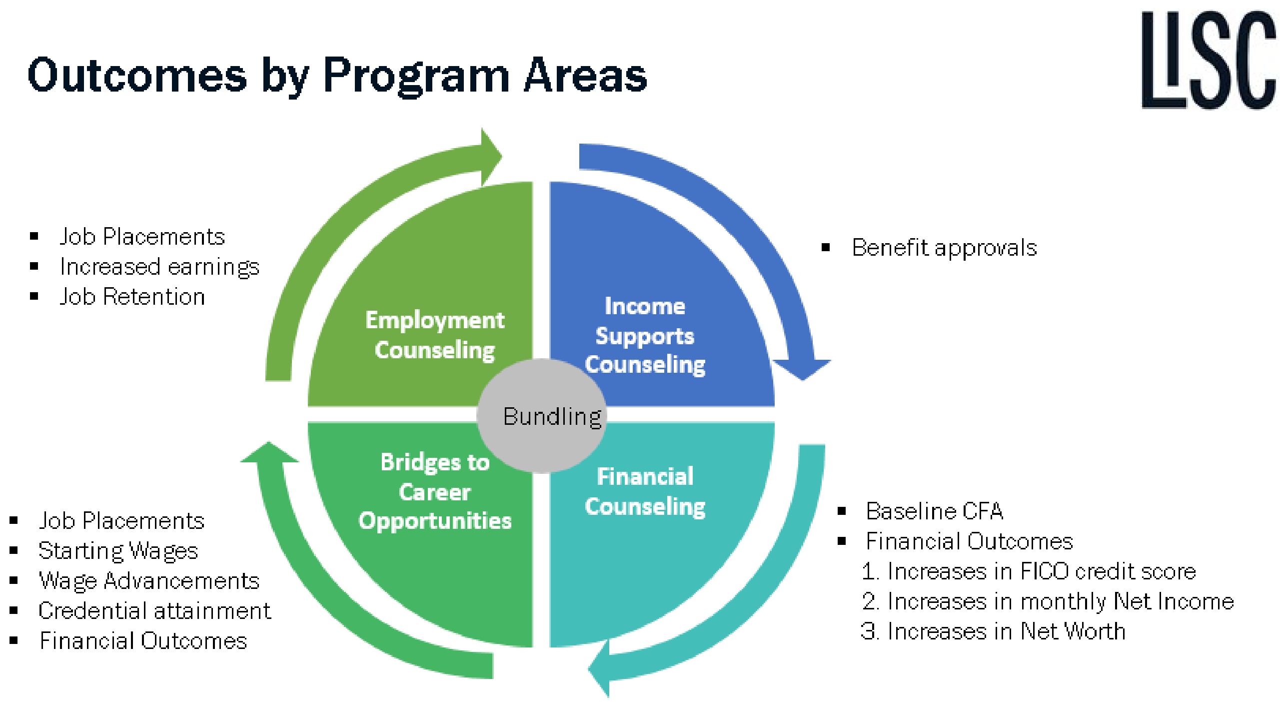
7. Editing & Recording Attendance: When you return back to the main screen for your group, you will see all of your reoccurring sessions and clients enrolled in the class. Select edit on any individual session to record attendance or edit the topic.



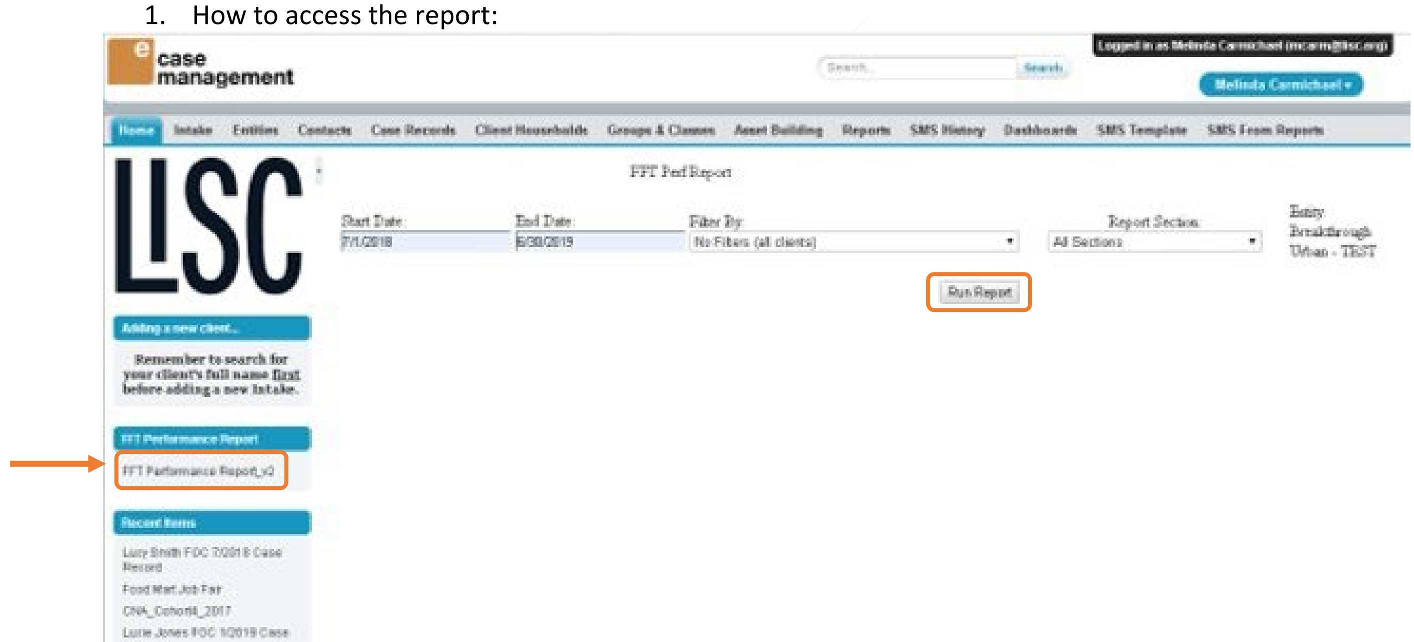
8. When recording attendance always remember to change the Status, and record each individual client's attendance. You should not delete a client if they did not attend that particular class as there is an option under client attendance to select "No Show".



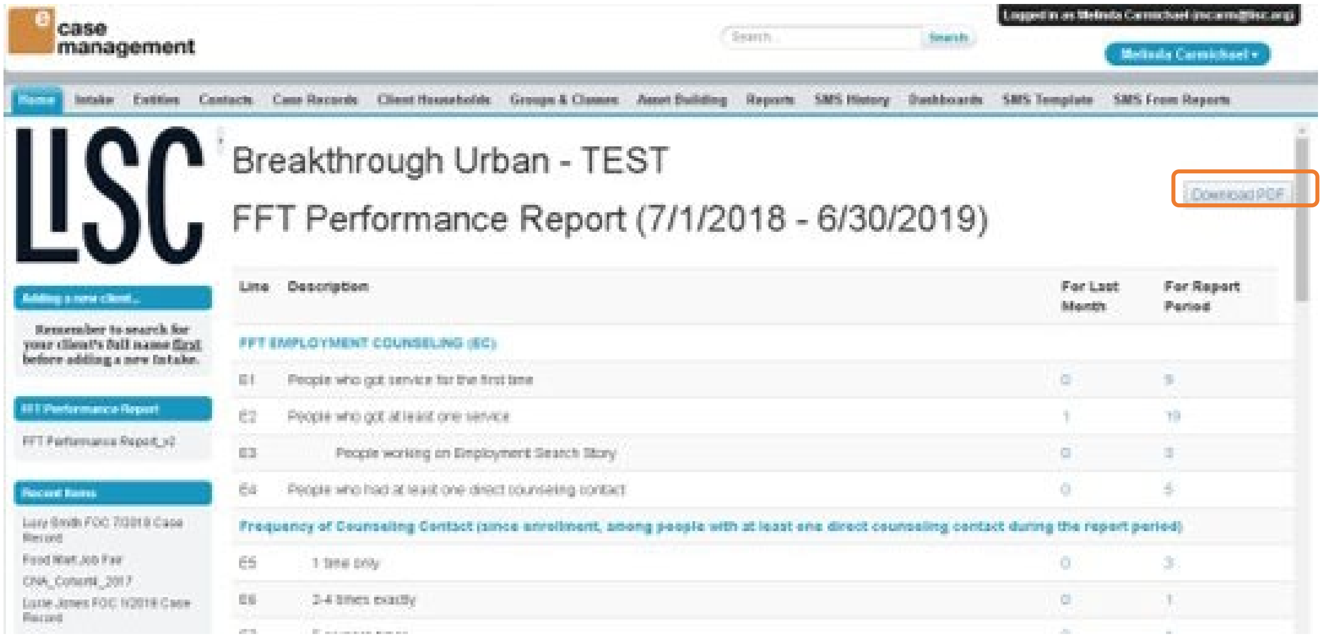
FFT™ Performance Report:



1. How to access the report:



Note: Make sure the left panel is expanded by clicking on the blue arrow button.



Note: Wait until the report is fully loaded to download the PDF copy.