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 <u>fftfocsupport@lisc.org</u> or bring your question to support office hours.

Salesforce Login information:

Website: <u>https://partial-lisc.cs62.force.com/partners/login</u> 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.

 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.

Home	Intake	Entities	Contacts	Client Households	Case Records	Groups & Classes	Agency Contracts	Dashboards	Reports	+	
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						Pro	gram Financial Opp	ortunity Center •	•		
۲	Client						T manoral opp	ortanity contor			
				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.

Household Members	pusehold Members									
First Name	Last Name	Middle Initial	Birthdate	Household Role	Gender	View				
		(Add Row							
First Name Nicole				Last Name	<last name=""></last>					
Middle Initial				Birthdate	1/5/2011					
Household Role 🕗 Child	T			Gender	Female v					
			Apply Cancel							

(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.

ntacts	Client Households	Case Records	Groups & Classes	Agency Contracts	Dashboards	Reports	+				
1	^{Case Record} Lisa Fake F	OC 10/2016	Case Record	hove	e <i>Case Rec</i> r over the s <i>ment</i> link	, í		Customize Pag	e Edit Layout Printal	ble ∖iew Help for t	this Page 🥝
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Asse	ssment		Financial We CASAS Test	Budget Creater		ce Sheet Wo	orkKeys 1	TABE test	Accuplacer test	Assess	ment Help
No re	cords to display										

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.

ntacts	Client Households	Case Records	Groups & Classes	Dashboards Reports	+	
_	Case Record Lisa Fake FC	DC 10/2016	Case Record	hove	<i>Case Record,</i> r over the <i>yment</i> link.	Customize Page Ec t Layout Printat
	Service Entries [1]	Direct Services [4]	Progress Notes [0] Gro	up / Class Assignments [0] A	tion Plans [0] Assessment [4]	Education [0] Employment [0] Outl
Emp	loyment		New Employn	nent		
No re	ecords to display					· · · · · <u>. · · · · · · · · · · · · · ·</u>

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.

ntac	ts Client	Households	Case Records	Groups & Classes	Agency Contracts	Dashboards	Reports	+	
•	Case R Lisa		DC 10/2016	Case Record	From the Co hover o <i>Educati</i>	ver the		tomize ^p age E	idit Layout Printabl
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_	Service En	tries [1] Progr	ess Notes [0] Direc	t Services [4] Group / Cl	ass Assignments [0] Ad	tion Plans [0] A	ssessment [4]	Education [0]	Placements [0]
E	ducation			Degree/Certificate	e/License Education/Tr	aining Program			
1	No records to	display							

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 Financial 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]
5/15/2019	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
F(FWB) PART 1: How well does this statement describe you or your situation?	
I could handle major unexpected 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 i A Never	Part 2 Total 13
I have money left over at end of month () 3 Often	Part 2 Iotal 13
I am behind with my finances 4 Never	
My finances control my life 2 Sometimes	
my mandes control my me 2 Someanies	
▼ 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	Thanka supusity source 3
Conf: ability make ends meet: 1 Somewhat confident	
emergency 🥥	
Do you have automatic savings? 📀 0 No	
Nas family's expense less than income? 🙆 🛛 No	
ast 2 mos, have been charged late fee? 🧿 1 No	
ast 2 mos, have been charged late fee? 🧿 1 No V Custom Links	Financial Canability Scale _ Financial Canability Scale
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Aast 2 mos, have been charged late fee? 1 No Custom Links FWB Scale Scoring Worksheet Financial Well-Being Scale User Guide Financial Well-Being Scale User Guide Notes Notes	Financial Capability Scale <u>Financial Capability Scale</u>
Last 2 mos, have been charged late fee? 1 No	
Aast 2 mos, have been charged late fee? 1 No	Created By <u>Carolina Rendon</u> .
Aast 2 mos, have been charged late fee? 1 No	

- 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.

ntacts	Client Households	Case Records	Groups & Classes	Agency Contracts	Dashboards	Reports	+		
_	Case Record Lisa Fake FC	DC 10/2016	Case Record	nove	Case Rec r over the sment link	ŕ	Customize	Page Edit Layout Printable	View Help for this Page 🕑
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Asses	sment		F Financial H CASAS Test	GAIN Test Other Tes	Budget Balanc	e Sheet t W	lorkKeys Test TABE t	Accuplacer test	Assessment Help
No re	cords to display	<u></u>					<u></u>	opportainty contai	

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.

ntacts Client Households Case Records Groups & Classes	s Agency Contracts Dashboards	Reports +	
Case Record	From the Case	e Record,	
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Action Plans	New Action Plan		
No records to display			
Action Plan	Save Save & Close	Cancel	
Action Plan ECM Goals			
Action Plan Details			
Staff User V	R	Start Date	
End Date		Vision Narrative	

Save Save & Close Cancel

💐 Action Plan

Action Plan ECM Goals			Save Save & Close Cancel	Copy Existing		
		Save Save & Close				Cancel
Goals						
Client Goal	Microenterprise None Budgeting Credit Building Debt Management			Goal Action(s)	Available Create a business plan Develop a marketing plan Open a business account	Chosen A
If other client goal, specify	Microenterprise Savings/Investing		If othe	r goal action(s), specify		
Target Completion Date	Transacting Other		Α	ctual Completion Date		
Description						
		Save Save & Close				Cancel

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.

ntacts	Client Households	Case Records	Groups & Classes	Agency Contracts	Dashboards	Reports	+		
	Lisa Fake F	OC 10/2016	Case Record		e <i>Case Re</i> ver the <i>Se</i>	· · · ·	Custo	omize Page Edit Layout	Printable View Help for this Page 🕜
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Serv	ce Entries		New Service	Entry					Service Entries Help ?
No re	ecords to display								



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).

▼ Credit Builde	Credit Builder Loan (with match)									
Client	UOS	Name of Entity	Status	Tw	vin Accounts?					
Lisa Fake	0.00	Twin Accounts	Applied (or re-applied)	V	3					
Units of Service	Units of Service: Time (Minutes)									

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.

▼ Credit Builder Loan (with match)										
Client	UOS	Name of Entity	Status	Twin Accounts?						
Lisa Fake	0.00	Twin Accounts	Approved (or re-approved)							
Units of Service	Units of Service: Time (Minutes)									

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.

- Show Feed	Fake FOC 10/2016		rom the <i>Case F</i> hover over t <i>Assessment</i> I	he	Customize Page t	Edit Layout Printable View Help for this Page
	ustom Object Definitions ce Entries [0] Progress Notes [0]	Direct Services [0] Group / 9	Class Assignments [1] Service Pl	ans [1] Assessment [3] Education [0] E	Placements [0] Outbound	Referrals [0] Case Participations [1]
ssessment		Financial V Other Test	Vell Being Budget Credit Repo	t Balance Sheet WorkKeys Test TABE te	st Accuplacer test CAS	AS Test GAIN Test Assessment Help
Action A	Assessment #	Assessment Date	Record Type	Date of Financial Profile	Sequence	Parent Assessment
🗆 Edit Del 🛛 A	Assessment -0104	1/3/2015	Budget		Baseline	
🛛 Edit De 🛛 A	Assessment -0105	1/3/2015	Credit Report		Baseline	
🗏 Edit Del 🛛 A	Assessment -0106	1/3/2015	Balance Sheet		Baseline	
-	nt Sment -0105 stom Object Definitions		Click on	the <i>Clone</i>	Customize Pa	e Edit Layout Printable View Help for the
			button t	o copy the		
t	Dotail					
ssessment I	Detail Assessment Date 1/3/201			sment.	e Credit Report [Chang	

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).

Show Feed Service Entries [0] Progress Notes [0] Direct Services [0] Group / Class Assignments [1] Service Plans [1] Assessment [0] Education [0] Placements [0] Outbound Referrals [0] Service Entries New Service Entry Service Entries No records to display			e FOC 10	/2016 Cas	e Record	From the Case hover over th Entries I	e Service	Customize	Page Edit Layout Printa	able View Help for this Page 🔞
No records to display	« Ba	ack to List: Users	es [0] Progress	Notes [0] Direct S		ass Assignments [1] Service	Plans [1] Assessme	ent [0] Education [0]	<u>Placements (0)</u> <u>O</u> l	
	serv	ice Entries		L L						

Select an ECM Service Entry Form

Employment Counseling Finencial Counseling Income Supports Counseling Work/Education Supports	
	Next Cancel

Revised on: 9/27/2021

	Save	& Close Save & New Cancel	
Service Date			
		Start Time	9:00 AM V
Date	3/15/2018 [<u>4/1/2020]</u>		
Service Details			
Staff Person 🤇		Reach person you attempted to contact?	Yes V
General Benefits Screening Results	Completed screening: eligible for at least one benefit 🔻	Contact with	Client
Contact/Location Method	In person	Duration (Minutes)	60
Eligible Benefits			
Eligible for the following benefits	Child Care Subsidies FAFSA Financial Aid (grants) Head Start/Early Head Start Medical Benefit/Health Insurance Other Non-Recurring Assistance (cash or non-cash) Recurring Cash Assistance/Payments SNAP (food stamps and comparable programs) Unemployment Compensation WIC (Women, Infants & Children)	Chosen Subsidized Housing Utility Assistance	*
Child Care Subsidies			
FAFSA			
Financial Aid (grants)			
> Head Start/Early Head Start			
> Medical Benefit/Health Insurance			
> Other Non-Recurring Assistance (ca	sh or non-cash)		
> Recurring Cash Assistance/Payment	'S		
> SNAP (food stamps and comparable	programs)		
Subsidized Housing			
Unemployment Compensation			
Utility Assistance			
> WIC (Women, Infants & Children)			
Note			
Note Create	d By Cr	eated Date	View/Edit
		Add Row	
	Save	e & Close Save & New Cancel	

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.

From the Case Record,									
Jisa Fake FOC 10/2016 Case Record									
		hover over the Service	Customize Page Edit Layout Printable View Help for this Page 😯						
- Show Feed		Entries link.							
Back to List: Users	ress Notes [0] Direct Services [0] Group	/ Class Assignments [1] Service Plans [1] Assessment	0 Education 0 Placements 0 Outbound Referrals 0						
ervice Entries	New Service En	fry	Service Entries Help ?						

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.

	Fake FOC 10/2016	Case Record ho	the <i>Case Rec</i> o over over the cessment link		Customize Page Edit	Layout Printable View Help for this Page 🍕
- Show Fee		ASS	essment link	•		
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Assessment		Financial Well Be Other Test	ing Budget Credit Report	Balance Sheet WorkKeys Test TABE	test Accuplacer test CASAS	Test GAIN Test Assessment Help
Action	Assessment #	Assessment Date	Record Type	Date of Financial Profile	Sequence	Parent Assessment
🔲 Edit Del	Assessment -0104	1/3/2015	Budget		Baseline	
🔲 Edit Del	Assessment -0105	1/3/2015	Credit Report		Baseline	
🔲 Edit De	Assessment -0106	1/3/2015	Balance Sheet		Baseline	

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).

ntacts Client Households Case Records Gr	oups & Classes Agency Contracts Das	hboards Reports +	
Case Record Lisa Fake FOC 10/2016 C	ase Record From the Cas hover over th Entries	e Service ou	stomize Page Edit Layout Printable View Help for this Page 🥹
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Service Entries	New Service Entry		Service Entries Help ?
No records to display			
Select an ECM Service Entry Form Lisa Fake			
 Employment Counseling Financial Counseling Income Supports Counseling Work/Education Supports 			
		Next Cancel	

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		Sav	& Close Save & New Cancel			
Date of Service						
_		_	Start	t Time 9:00 AM 🔻		
Date	3/15/2018 [<u>4/1/2020</u>	11				
 Service Details 						
Staff Person 🥝		9	Reach person you attemp co	nted to Yes 🔻		
Contact/Location Method	In person 🔻		Contac	t with Client 🔻]	
Duration (Minutes)	60					
Education/Training Search						
Client UOS	Name of Entity	y Status			Number of applications submitted	Vie
Lisa Fake 0.00	Healthcare -	CNA Program Initiate	d/continued search			
Lisa Fake 0.00 Units of Service: Time (Minutes)	Healthcare -	CNA Program Initiate	d/continued search	•		
	Healthcare -	CNA Program Initiate	d/continued search	T		
Units of Service: Time (Minutes)	Healthcare -	CNA Program Initiate	d/continued search	T		
Units of Service: Time (Minutes) Employment Search	Healthcare -	CNA Program Initiate	d/continued search	•		
Units of Service: Time (Minutes) Employment Search (New)		CNA Program Initiate	d/continued search	T		
Units of Service: Time (Minutes) Employment Search (New) Client	Lisa Fake	CNA Program Initiate	d/continued search	T		
Units of Service: Time (Minutes) Employment Search (New) Client UOS	Lisa Fake 0.00	CNA Program Initiate	d/continued search			
Units of Service: Time (Minutes)	Lisa Fake 0.00 CNA Positions Discussed pros/cons		d/continued search			

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.

Home	Intake	Entities	Contacts	Case Records	Client Households	Groups & Classes	Reports	SMS History	Dashboards	SMS Template	SMS From Re	eports	
	S		View	Home	▼ Gol								
			Re	cent Entities		New							Recently Viewed V
Adding	a new client		Ent	iity Name		Entity Record Type		Туре	Prima	y Contact	Billing City	Phone	Total Gifts
	ember to s		Alin	vio Medical Center		Entity							\$0.00
	lember to s lient's full			eakthrough Urban - 1	EST	Partner Agency		Partner Agency					\$0.00
	ntac		ient Hous		se Records G	roups & Classes		cy Contracts			ts +		
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	E	ducatio	on			Degree/Certification	ate/Licens	e Education/	/Training Prog	ram			
	N	lo record	ls to displa	у									

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.

ntacts Clien	ıt Households	Case Records	Groups & Classes	Reports	Dashboards	Asset Building	+				
Save Record From the Case Record, Customize Page Edit Layout Print hover over the											
Service E		t Services [4] Prog	ress Notes [0] Group /	Class Assignm		l cation lin		Education [1] Employmen	[1] Outbound Referral	s [0] Case Record
Education Degree/Certificate/License Education/Training Program											
Action	Education #	Record Type	Educational institution	Education/tr	aining placement	level Start date	End date	Exit status	Issuing entity	Degree/certificate obt	ained Date degree
Edit D	Education- 162839	Education/Training Program		Vocational/o training (not	ccupational skills	5/5/2018					

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.

ntacts	Client Households	Case Records	Groups & Classes A	gency Contracts	Dashboards R	leports +		
	Lisa Fake FC	DC 10/2016	Case Record	From the hover ove			Customi	ze Page Edit Layout Printable \iew Help for this Page 🥹
-h-	Show Feed			Entri	es link.			
« Ba	ck to List: Users Service Entries [0]	Progress Notes [0]	Direct Services [0] Group	/ Class Assignments [1]	<u>Service Plans [1]</u>	Assessment [0]	Education	0] Placements [0] Outbound Referrals [0]
Serv	ce Entries		New Service En	try				Service Entries Help 🥐
No re	ecords to display							
	Select an ECM Se Lisa Fake	ounseling seling rts Counseling						
					Next	Cancel		

Date	e 7/7/2018				
 Service Details 					
Staff Perso	n 🥝	<u>_</u>	Reach person you attempted to contact? 🥝	Yes 🔻	
Contact/Location Metho	d In person ▼		Contact with	Client •	
Duration (Minutes	30				
Education/Training Search					
Employment Search					
- Exam					
Client UOS	Name of Entity	Status		Type of exam	If other degree/certificate, specify View
Lisa Fake 0.00	CNA	Registered for exam	•	License •	
Units of Service: Time (Minutes)					
Retention Support					
Microenterprise					
 Note 					
Note Creat	ed By	Created Date		View/Edit	
		Add Row			
		Save & Close Save & New	Cancel		
			Power BLD		

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

itacts Cli	ient Households	Case Record	s Groups	& Classes Das	shboards Rep	oorts +			
	ase Record ISA Fake FO	C 10/20	16 Case	Record		ho	the <i>Case Record,</i> ver over the ployment link.	nize Page E it Layout Print	table View Help for this Page 😮
	Service Entries [1] [Direct Services [4	Progress N	otes [0] Group / C	Class Assignments [0] <u>Action Plans [0</u>	Assessment [4] Education	01 Employment [1] 0	utbound Referrals [0]
Employn	nent			New Employment]				Employment Help ?
Action	Employment Name	Job Start Date	Job End Date	Job Title/Position	Hourly Wage (\$)	Hours per Week	Benefit Type	Wage Type	Days since job start date
Edit De	<u>P-0083</u>	10/16/2014			\$10.00	20	Job will (eventually) OFFER H Insurance	lealth Unsubsidized Job	830
	Home S	Site Propidition	rough Urban -						
	Job Termination	n							
		ob End Date	None		~				
	Notes								
		Notes				~			

Save Save & New Cancel

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

Home	Intake Entitie	s Contac	ts Case Records	Client Households	Groups & Classes	Reports	SMS History	Dashboards	SMS Template	SMS From Repo	rts	
	5		Entities Home iew: All Entities	▼ Go!								
Ľ	.UU	J	Recent Entities		New							Recently Viewed V
Adding	a new client		Entity Name		Entity Record Type		Туре	Primar	y Contact	Billing City	Phone	Total Gifts
Dame	Remember to search for your client's full name fir		Alivio Medical Center		Entity							\$0.00
your cl			Breakthrough Urban -	TEST	Partner Agency		Partner Agency					\$0.00

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.

tacts C	lient Households	Case Record	s Groups	& Classes	Dashboards	Reports	+				
Case Record Lisa Fake FOC 10/2016 Case Record hover over the Employment link. Customize Page E it Layout Printable View Help for this Page (
-∦- Sh	- Show Feed										
Employ		Direct Services [4	1 Progress I	New Employ		ients juj Ad	tion Plans [0	<u>Assessment [4]</u> [Education [0] Emj	<u>ployment [1]</u> <u>Ou</u>	tbound Referrals [0]
Employ	inent		U	New Employ	intent						Employment Help ?
Action	Employment Name	Job Start Date	Job End Date	Job Title/Pos	sition Hourly Wag	ge (\$) Hours	per Week	Benefit Type		Wage Type	Days since job start date
Edit De	P-0083	10/16/2014	2/10/2015	Cashier	\$1	10.00	20	Job will (eventually) (Insurance	OFFER Health	Unsubsidized Job	830
	Home	Site Broaktbr	ough Lirban -	псет							

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.

cts Client Households Case Records G	oups & Classes Dashboards Reports	F. Contraction of the second se					
Case Record Show Feed From the Case Record, hover over the Assessments link. Customize Page Edit Layout Printable View Help for this Page							
Service Entries (1) Direct Services (4) Pro			mployment [1] Outbound Referrals [0] GAIN Test TABE Test Assessment Help ?				
Action Assessment #	Assessment Date	Record Type	Sequence				
Edit Del Assessment -0107	1/17/2015	Budget	Latest				
Edit Del Assessment -0104	1/3/2015	Budget	Baseline				
Edit Del Assessment -0105	1/3/2015	Credit Report	Baseline				
Curl Der Abbedoment ereb							

acts	Client Households Ca	se Records Grou	ps & Classes	Dashboards	Reports	+			
	Assessment Assessment -07	107						Customize Page Edit Layout Printable	view Help for this Pag
As	sessment Detail		Edit	leteClone					
▼ A:	ssessment Date: REMEMB		te if subseq	UENT			Depart Tu	na DudaatiChanaal	
acts	Client Households Cas	e Records Group	s & Classes	Dashboards	Reports	+			
	Assessment Edit New Assessmer	nt							Help for this Page 🃢
As	sessment Edit		Save	e & New Cancel]				
As	sessment Date: REMEMBE	R TO UPDATE DAT	E IF SUBSEQU	ENT				= F	Required Information
	Assessment Date	January	/ <u>23/2017]</u> ▼				Record Type Case Record	Budget Lisa Fake FOC 10/2016 Case	
In	formation	28 29 30 3 4 5 6 7	1 1 2 3		T	First			

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.

ntacts	Cli	ent Households	Case Records Group	ps & Classes Das	shboards Rep	orts +				
•		^{se Record} isa Fake FC	0C 10/2016 Cas	se Record	ho	he <i>Case R</i> ver over tl	he	Customize Page	Ec t Layout Printa	uble View Help for this Page 💡
-4	- Shov	v Feed			Emp	loyment l	ink.		+	
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Em	ployn	nent		New Employment]					Employment Help 🥐
Act	tion	Employment Name	Job Start Date Job End Da	ate Job Title/Position	Hourly Wage (\$)	Hours per Week	Benefit Type		Wage Type	Days since job start date
Edi	it De	<u>P-0083</u>	10/16/2014	Cashier	\$10.00	20	Job will (eventually Insurance	y) OFFER Health	Unsubsidized Job	830
_	_	Home	Sita Braskthrough Urba	n - 1691						
Imployment From the Employment Record, hover over the Advancements link.							rintable View ∣ Help for this Pag			
					Ad	vancements [0]		Customize Pa	age Eult Eayout P	ninable view [help for this Pag
Adv	ance	ments		New Advanceme	nt					Advancements Help
No	record	s to display								

Revised on: 9/27/2021

Advancement Edit Save Save & New Cancel	
Information	= Require
Date 8/28/2019	Job Placement P-0083
Contact with Client Tried unsuccessfully to verify retention Suspended On leave of absence Returned to work	* *
Employment Update	
Date of change in employment [1/23/2017.] Current Hourly Wage	Current Title/Position Current Benefit TypeNone
Retention Milestones	
Milestone Achieved 30 Days Documentation () Verbal report by client	
Notes	

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.

Home	Intake	Entities	Contacts	Case Records	Client Households	Groups & Classes	Reports	Dashboards	SMS From Reports		
			Da	shboard							
н			My	Tasks		New				Overdue	•

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".

Hom	e Intake	Entities	Contacts	Case Records	Client Households	Groups & Classes	Reports	Dashboards	SMS From Reports		
	2		Viev	Groups & Classe Home My Groups & C							
		UU	Recent Groups & Cla	Classes	Create New	/ Group / Clas	:5			Recently Viewed V	
Addi	ng a new cliei	1t	Gre	oup-Class Name		Description	Progra	m		Service	Site
				20 FW				Financial Opportunity Center		Workshop/Class	
you	Remember to se your client's full n	l name fir	<u>st</u> <u>VV</u> 8	3 CDL Cohort1 JB			Financ	ial Opportunity Ce	nter	Work/Education Supports	
befo	re adding a	new Intak	e. \A/G	S CDI Coborti IC			Financ	ial ∩nnortunitv ∩e	intor	Work/Education Sunnorte	

- 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"

WS_CDL_Cohort1 JB

Group / Class Edit	Save Save & New Cancel	
Information		= Required Information
Group-Class Name	WS_CDL_Cohort1 JB	Type of Client Available Clients
Program (Financial Opportunity Center 🕙	
Service (Work/Education Supports 🛛 🕙	
Home Site	Breakthrough Urban - TEST	
System Information		
Owne	er Training AAccount	ECM Sharing 🥥 0010S00000RR0jo
	Save Save & New Cancel	

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.

acts Case Records Client Households Groups	& Classes Reports Dashboards SMS From Reports	
Group / Class WS_CDL_Cohort1 JB « Back to List: Groups & Classes	Group Service Entries (17) Group / Class Assignments (3)	Printable View
Group / Class Detail	Edit Clone Sharing chedule Session Add Clients	
Group-Class Name WS_CDL_Cohort1 JB	Type of Client O Enrolled Clients	
Program 🥝 Financial Opportunity (Center	
Service 🥝 Work/Education Suppo	nts	
Home Site <u>Breakthrough Urban -</u>	IEST	
▼ System Information		
Owner I Training AAccount	Change) Created By Training AAccount, 3/4/2020 4:21 PM	
	Last Modified By Training AAccount, 3/4/2020 4:23 PM	
	ECM Sharing 🥝 0010S0000RR0jo	
	Edit Clone Sharing Schedule Session Add Clients	

- 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"

		Save	Save & Close Save & New Cancel	
	Scheduling			
	Reoccurrence	Weekly •		
	Days of Week	Available * Chosen Thursday Friday Saturday * • • • • • • • • • • • • • • • • • •	* •	
	Start Time	9:00 AM V	Duration (Hours) 🥥	1.00
	Start Date	3/1/2020 [3/25/2020]	End Date	3/31/2020 [3/25/2020]
	Create Event		Assign Event to 🥹	User Carolina Rendon
	Class Date			
	Date / Time	[3/25/2020 9:48 AM]	Status	None 🔻
	Workshop Details			
	Type of Workshop/Class	Employment/Education Workshop	If other type of workshop/class, specify	
	Topic/Course	Resume & Cover Letter Writing Skills, Part 2 🔻	Specify topic/course	
	Curriculum Developer/Owner	Accenture •	If other curriculum developer, specify	
All can be edited	Curriculum contains digital literacy		Workshop Facilitator	
later	Master Client Attendance			
	Client Att * All values in this section will be appli			
	Client Attendance			
	C 0 1	1000 D N	CT 144 1	10 10 10

- 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

PAdd Clients to Resource Room TEST 11/17							
Search	n Criteria						
Sea	rch	Type of Client 😳 Enrolled Clients 🔻		Program Financial Op Lest Name <mark>fake</mark>	portunity C	Center 💌	
		٥	204 matching row(s) found.				
Search	n Results						
			Save Close				
Exist	ing Enrolled Cl	ients					
-	Client	Client Household	Case Name	Client	Status	Enrolled Date	Career Coach
	Abbie Fake	Fake Household	Abbie Fake FOC 2/2017 Case Record	Abbie Fake	Active	12/5/2011	
	Adult Fakes	Fakes Household	Adult Fakes FOC 2/2017 Case Record	Adult Fakes	Active	1/3/2015	
0	Allicon Take	Estra Llourschold	Allicon Esko EDC 3/3037 Case Record	Alleon Cate	Activo	- /1 /1-	

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".

Class Date		-		-
Date / Time	11/6/2017 9:00 AM [<u>11/15/2017 1:46 PM</u>]		Status Recorded Attendance •	
Duration		7		_
Duration (Minutes)	60			
Workshop Details		Record		
Type of Workshop/Class	Digital Literacy Workshop		specify	
Topic/Course				
	Internet Basics	both places		
Curriculum Developer/Owner	Accenture	eloper,	specity	
Workshop Facilitator			\mathbf{X}	
Client Attendance				
Case Record	VOS	Progress Note	Clie	nt Attendance View/Edit
× Abbie Fake FOC 2/2017 Case Re	0.00		Att	ended ▼
× Adult Fakes FOC 2/2017 Case Re	cord 0.00		Att	ended 🔻
× Alison Fake FOC 2/2017 Case Re	ecord 0.00		Ca	nceled v

FFTTM Performance Report:



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

case management	(Esarch Search Search	ged in as Melinda Carnichael (incarnatioscarg) Melinda Carnichael •
intake Extities Co	rach. Caur Records Olient Households. Groups & Olasses: Asset Building. Reports. SMS History: Bashboards. SMS	S Template SMS From Reports
100	Breakthrough Urban - TEST	
L 3C	FFT Performance Report (7/1/2018 - 6/30/2019)	Download PDF
Adding a new client.	Line Description	For Last For Report Month Pariod
Remember to search for your client's full name first	FFT EMPLOYMENT COUNSELING (EC)	
before adding a new Intake.	EI People who gut service for the first time	0 9
El Partermance Report	E2 People who got at least one service	1 19
PT Performance Report, y2	E3 People working on Employment Search Story	a a
Second Rems	E4 Feople who had at least one direct counseling contact	0 5
Lary Brids FOC 7/3018 Cape Record	Frequency of Geunseling Centact (since enrollment, among peeple with at least one direct counseling contact dur	ring the report period)
Food Mart, Job Fair	E5 1 time brily	0 3.
CNA_CotorN4_2017 Juste Jones FOC 1/2018 Case	E6 2-4 titles exactly	0 1
Record	25 Forentiate	

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

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