FFT^{TM} Salesforce Frequently Asked Questions

(This document includes answers to frequently asked questions about FFT^{TM} in Salesforce. For specific instructions, please consult the FFT^{TM} Salesforce Quick Reference Guide.)

Assessments

Q1: How often should I take the Financial Health assessment?
A1: This assessment should be taken at least once every six months but can be taken more frequently. Please take the opportunity to update the Financial Health assessment any time you meet/speak with a participant about a change in his/her financial situation.

Q2: How often should I take the Credit Report assessment?
A2: At least once every six months.

Q3: Does it matter what order I take the Financial Assessments in?
A3: Yes. Please take the Financial Health assessment first. We want to avoid altering the way the participant sees his/her financial situation by completing another assessment first. The Credit Report should be pulled before completing the Budget and Balance Sheet Assessments as well.

Q4: Should I clone the Financial Health assessment when I take a subsequent assessment, or should I start fresh with a new assessment?
A4: For the Financial Health assessment, do NOT clone it. Start fresh with a new assessment. Ask each question fresh of your participant and do not assume that any of the answers will be the same as they were last time you took the assessment.

Q5: What should I do if a participant wants to switch from taking Budget/Balance Sheet assessments as an individual to as a household or vice versa?
A5: In general, it is best to be consistent and keep a participant's assessments to either an individual or a household. If that is not possible, then the first assessment taken that switches from individual to household or vice versa will act as a new baseline assessment. The reports will only compare individual to individual assessments and household to household assessments to determine increases in net income (NI) or net worth (NW). For example, if a participant has two individual assessments and then two household assessments, an increase in NI/NW in the individual assessments that falls during the report period will be reported, or an increase in NI/NW in the household assessments that falls during the report period will be reported, but an increase from an individual assessment to a household assessment will not be reported.

Service Entries

Q1: How do I enter more than one of the same counseling topic (e.g. when a participant has two delinquent bills)?
A1: Unfortunately, we cannot enter more than one of the same counseling topic on a single Service Entry. If you need more than one, simply record the first one (e.g. a delinquent bill from a hospital) on a Service Entry for that contact, and then click on the "Save & New" button. Enter a second Service Entry for that contact with the second counseling topic (e.g. a delinquent bill from an energy company) on it. Make sure to divide up the time you spent on that contact between the two Service Entries. For example, your first Service Entry for that contact might be for 25 minutes and include Delinquent Bill, Credit Report Error, and Credit Card topics, and your second Service Entry for that contact might be for 5 minutes and include only Delinquent Bill.

Employers, Employment Records, and Retention

Q1: On an Advancement on an Employment Record, what is the difference between the "Date" and the "Date of change in employment"?
A1: Enter the date of contact with the participant/employer in the "Date" field. Enter the date of the change in the job (e.g. when the participant got an increase in wages) in the "Date of change in employment" field. For example, if you spoke with a participant on 3/10/17, and she told you that she got an increase in hours on 2/28/17, then you would enter 3/10/17 in the "Date" field and 2/28/17 in the "Date of change in employment" field. If you are only recording retention verification, not a change in employment, leave the Employment Update section blank.

Q2: What should I name an employer entity?
A2: To differentiate between employers with the same name, please name employer entities as follows: "Company Name – intersection or address" (e.g. Starbucks – Western and Peterson).

Groups and Classes

Q1: When creating a new Group/Class, what "Type of Client" should I select?
A1: Always select both Enrolled Clients and Clients. Enrolled Clients have active case records and Clients do not. Selecting only one option will duplicate attendance.

Q2: When creating a new Group/Class for Work/Education Supports, which "Service" should I select?
A2: Always select the Service that is the "Group / Class" Service Type when creating a Group/Class. So for Work/Education Supports, select the "Work/Education Supports" Service of the "Group / Class" Service Type.

Demographics

Q1: If a participant is a non-custodial parent who pays child support, are the children counted as members of his/her household?
A1: Yes, count anyone the participant pays for as a member of the household.

Households

Q1: Do I need to search for a household member before adding him/her?
A1: Yes, please search for anyone before adding him/her to avoid duplicates.

Q2: If a household member is already in Salesforce, how do I add them to a household?
A2: Click on the household member's Contact Record, and then click on the household member's household link in the Household & Family Info section. Click on Edit, edit the Household name to match the household you want to add the household member to, and click on Save.

Q3: How do I change a Household name if my participant has a common last name?
A3: Click on the participant's Contact Record, and then click on the household link in the Household & Family Info section. Click on Edit, edit the Household name, and click on Save.

Q4: What should I enter in Household Role in Demographics if two household members (e.g. a couple) enroll in the FOC at the same time?
A4: Select one to be "Self" (it does not matter which one) and assign the other one's role in relation to "Self", such as "Spouse/Partner".

<u>Miscellaneous</u>

Q1: What browser should I use?
A1: Salesforce generally works in any browser, but we recommend Google Chrome.

Q2: Where should I enter non-traditional income supports, like Go Fund Me or Benevolent?
A2: Please enter these supports on a Service Entry in the topic that matches what the support is for. For example, if the money raised is for college tuition/books/work boots, etc., please enter it in Work/Education Supports. If it is for a medical procedure or bill, please enter it in Income Supports Counseling under Medical Benefit/Health Insurance. If it is for utilities, please enter it in Income Supports Counseling under Utility Assistance. If it does not fit under any of the existing topics, please enter it in Income Supports Counseling under Other Non-Recurring Assistance (cash or non-cash).

Q3: Do I need to enter anything into the UOS field?
A3: You do not need to enter anything into the UOS field on the Service Entries (although you may enter the number of minutes spent on each topic in this field if you want to), but you do indeed need to enter the minutes in the UOS field for Groups and Classes (e.g. how long a client attended a workshop/class).

Q4: Should I use the feed at the top (Post, File, etc.)?
A4: No, we do not recommend using this section. There are notes for a small number of clients whose data was migrated from ETO in the feed, so you may read the notes for reference, but we do not recommend adding to the feed. If you're not working with a migrated client, you may just hide the feed if you prefer.