

FFT™ Salesforce General Guidelines (August 2017)

INTAKE

- Search for participant and household members before entering them
- (For Workshops/Orientation only, create Contact only)
- For Counseling/Tax Prep, enroll in FOC or Tax Prep program
- Enter Demographics and add Household Members
- Complete Case Record information
- From Case Record, add Test Assessment(s), as applicable
- Search for and/or add Entities, as applicable
- From Case Record, add Employment Record(s) and/or Education/Training Program Record(s), as applicable

GROUPS AND CLASSES

- Add new Group/Class (Workshop/Class, Resource Room, or Work/Education Supports)
- Add members to Group/Class
- If Group/Class will meet weekly or monthly, schedule sessions
- Record attendance

TAX PREPARATION

- Record Tax Return assessment

FINANCIAL COUNSELING (FC) (from FOC Case Record)

First Session

- Record Assessments:
 - Financial Health
 - Credit Report
 - Budget
 - Balance Sheet
- Create an Action Plan
- Record Service Entry(ies): Financial Counseling

Subsequent Sessions

- Clone and record Assessments to record updates:
 - Financial Health (at least every 6 months)
 - Credit Report (at least every 6 months)
 - Budget
 - Balance Sheet
- Update Action Plan
- Record Service Entry(ies): Financial Counseling

Unsuccessful Contacts

- Record Service Entry: Financial Counseling

EMPLOYMENT COUNSELING (EC) (from FOC Case Record)

First/Subsequent Sessions

- Record Service Entry(ies): Employment Counseling and/or Work/Education Supports
- Search for and/or add Entities, as applicable
- Add Employment Record(s), Education/Training Program Record(s), and/or Degree/Certificate/License Record(s) as applicable
- Record progress on an Education/Training Program Record, as applicable
- Record Advancement (to verify retention and/or record job changes) on an Employment Record, as applicable
- Exit Employment Record and/or Education/Training Program Record, as applicable
- Make sure a new Budget Assessment is entered, as applicable

Unsuccessful Contacts

- Record Service Entry: Employment Counseling

INCOME SUPPORTS COUNSELING (ISC) (from FOC Case Record)

First Session

- Record Service Entry(ies): Income Supports Counseling, including General Benefits Screening Results and Eligible Benefits fields

Subsequent Sessions

- Record Service Entry(ies): Income Supports Counseling
- Make sure a new Budget and/or Balance Sheet Assessment is entered, as applicable

Unsuccessful Contacts

- Record Service Entry: Income Supports Counseling

FFT™ is a registered mark of, and FFT™ templates are proprietary to, Local Initiatives Support Corporation. FFT™ includes certain methodology that is confidential and proprietary to Project Match-Families in Transition Association, including specifically the method by which one-time outcomes and over-time outcomes are distinguished, tracked, and entered (including, without limitation, the usage of the status codes such as "beginning", "interim", and "end" or terms that embody similar concepts). You may not disseminate information pertaining to FFT™ or any component thereof (including without limitation third party methodologies) to unauthorized individuals nor embody any component of the FFT™ templates in any products or exploit the same in any way."

© Local Initiatives Support Corporation 2012. This work is protected by United States copyright law. Apart from any use as permitted by the U.S. Copyright Act, no part of this document may be reproduced, distributed, transmitted, or published without the express written permission of Local Initiatives Support Corporation. You may not alter or remove any copyright notice or proprietary legend contained in or on this document. Local Initiatives Support Corporation does not guarantee the accuracy, completeness, or usefulness of any content in this document or its fitness for any particular purpose.