FFT™ Salesforce Glossary

Action Plan: This replaces the Vision in ETO. Financial Coaches can create one Action Plan per participant, with the "Big Vision" on the first tab and the "Little Visions" on the ECM Goals tab, and continue updating that Action Plan over time.

Advancement: An update you can enter on the Employment Record to record retention verification and/or any changes to the job (e.g. increase/decrease in hours or wages, promotion, leave of absence, etc.). Note that we cannot change the name from "Advancement", but this actually refers to any update/verification of employment, not only to advancements.

Assessment: Collects information about a participant that is expected to change as a result of your services, e.g. Financial Health, Credit Report, Budget, Balance Sheet, TABE Test, etc. May be taken multiple times per participant to track changes.

Case Record: The record where all of the information about a participant in a particular program (except demographics) is kept and accessed. This information includes program enrollment and dismissal information, services, notes, assessments, action plans, education and employment records, referrals, orientation date, group/class assignments, coach assignments, etc. This is the place from which to record almost everything for the participant.

Client: A person who has some demographic information on a Contact Record but has not been enrolled in a program. This may be a prospective participant, a household member, etc.

Client Household: A grouping of Contact Records into a household.

Contact Record: The record of demographic information on a prospective participant, enrolled participant, household member, etc.

Dashboard: A page with visual representations of outcomes. You can click on a graph to see more detailed information about that query and/or to change the report period and/or report parameters.

Degree/Certificate/License Record: A record of a participant's attainment of a degree, certificate, or license. A participant may have multiple Degree/Certificate/License Records, even if s/he has only one Education/Training Program Record (e.g. if a training program grants multiple certificates as part of program completion, or if a participant earns a degree and then obtains a license for that profession).

Demographics: Information about participants that is usually collected at intake and is not expected to change as a result of your services, e.g. contact information and information about race, ethnicity, gender, household size, etc.

Detailed Outcome Report: A custom report designed by LISC that shows the service history for an individual participant.

Direct Service: A service for a participant. There may be multiple direct services included on a single Service Entry.

ECM: Exponent Case Management: An app designed for case, program, and outcomes management for human services agencies in Salesforce. LISC created Family Financial Tracking™ in Salesforce ECM.

Education/Training Program Record: A record of a participant's enrollment in and completion of or exit from an education/training program. This record does NOT show attainment of a degree, certificate, or license.

Education Progress: An update you can enter from an Education/Training Program Record to report whether the participant is regularly attending the education/training program and/or to record notes about the education/training program.

Employment Record: A record of a participant's employment.

Enrolled Client: A participant who has been enrolled into a program and, therefore, has a Case Record in that program.

Entity: An organization or individual that is involved in service delivery or referrals, e.g. an employer, service provider, referral provider, educational institutional, licensing board, or policymaker.

FFT™: Family Financial Tracking™. The LISC template in the Salesforce ECM software.

Groups and Classes: The place where group-based activities, including classes, workshops, Resource Room usage, and work/education supports can be recorded.

Home Site: The name of your organization.

Intake: The page where a new participant can be entered and enrolled into a program. After adding demographics and household members, a Case Record will be created and can be edited.

Outbound Referral: A record of a referral to an external entity. Use of the Outbound Referral is optional. Always enter your time and services via Service Entries and/or Groups and Classes.

Participant: An individual who receives services, NOT a partner in service delivery, such as an employer, service provider, referral provider, educational institutional, or policymaker.

Program: There is one program for all Financial Opportunity Center services and one just for Tax Preparation services.

Progress Note: A note for a participant. Progress Notes can be entered via Service Entries or Group Services or directly from the Case Record.

Service: On the Groups and Classes page, when creating a new Group/Class, you can select Workshop/Class for any workshop or class, Resource Room Activities, or Work/Education Supports.

Service Entry: A page where you can enter Counseling services and/or Work/Education Supports for an individual participant. There are multiple Direct Services combined on a Service Entry.

Staff Person: The person who provided the service to the participant. If you are entering your own services through your own log-in, you may leave this field blank. If, however, you are entering data on someone else's behalf, enter that person's name here.

Start Time: A field that cannot be disabled but is not required by LISC. You may leave it on the default 9:00am if you want or, if you prefer, you can use it record actual start times.

Subsidized Job: A temporary job with wages/salary paid to the employee at least in part by a government or non-profit agency.

Unpaid/Volunteer Job: A job that does not provide wages/salary. May be temporary or permanent.

Unsubsidized Job: A job with wages/salary paid to the employee by the employing company or a staffing agency. May be temporary or permanent.

UOS: Unit of Service: The number of minutes of service. This may be left blank on the Service Entries but should be completed on Groups and Classes.

User Account: A unique log-in with its own "signature" (e.g. for case notes).

FFT™ Demographics

Criminal Convictions: This question is only asking about convictions, NOT arrests or charges. If the participant has both felony and misdemeanor convictions, select the value "Convicted of Felony(ies)".

For past 12 mos, # of full months worked: A full month refers to either (1) the calendar month or (2) any four continuous weeks.

Gender: Select the gender reported by the participant.

Gross Household Income: Ask the participant to estimate his/her household income before taxes for the past 12 months. Please include ONLY the following types of income: income from wages, salaries, tips, etc.; business income; interest and dividend income; unemployment and disability income; welfare assistance; alimony; child support; pension and retirement income; gift income (regular gifts from non-household members); and armed forces income.

Household Members: A household includes: (1) one or more heads of household, and (2) their dependents (people for whom they are financially responsible). A head of household is anyone responsible for contributing income to the household's budget. The members of a household may or may not all live under the same roof. For example, a head of household may be supporting a child away at college or a parent in a nursing home who count as members of the household. On the other hand, two roommates who live together but do not combine their finances are not a household together.

Household Role: Select "Self" for the first member of a household enrolled in the FOC. The other household members' roles should be selected in relationship to the one marked as "Self". If two household members enroll at the same time, select one to be "Self" and assign the other role in relation to "Self".

In school/training at program entry? For this demographic, do NOT include any education or training program that the participant is enrolling in at your program by completing this intake. Only include education/training programs that the participant enrolled in BEFORE enrolling in your program and continues to attend at the point of intake.

Marital Status: Please note that common law marriage is not a legal status in many states. This value is only valid in certain states.

Primary Interest at Program Entry: Select the primary reason the participant initially came to the Financial Opportunity Center for services.

Primary Language: Select the language that the participant speaks most frequently at home.

Race and Ethnicity: Please note that "Hispanic" is included in "Ethnicity", not in "Race".

Working at program entry? Select "Yes" only if the participant is employed at the moment of intake. This does NOT include employment the participant obtains after enrolling in the program.