FFT™ Salesforce Quick Reference Guide

	Instructions
Log In	1. We recommend using Google Chrome. 2. Go to https://lisc.force.com/partners/login and enter your username and password. 3. Click on Log In.
Add a New Workshops/Orientation Only Participant (Contact)	1. Search for a portion of the participant's name in the Search box. 2. If not found, click on the Contacts tab. 3. Click on the New button. 4. Select Client as the Type of new record. 5. Enter as many demographics as are applicable to your site's processes. We recommend at least a full name, a date of birth, and contact information. 6. Click on Save. *Note: Only the user who creates a Contact will be able to enroll that Contact into a program later.
Add a New Counseling/Tax Prep Participant (Contact and Case Record)	1. Search for a portion of the participant's name in the Search box. 2. Search for a portion of each of the participant's household members' names in the Search box. 3. If not found, click on the Intake tab. 4. Select the program: Financial Opportunity Center or Tax Preparation, and click on Next. 5. Complete the demographics. 6. Add Household Members: Click on Add Row, enter information, and click on Apply. 7. Click on Save. 8. On the Case Record that is generated, click on Edit. 9. Enter information. 10. Click on the Save button.
Enroll a Workshops/Orientation Only Participant as a Counseling/Tax Prep Participant (Create a Case Record for a Contact)	1. Search for a portion of the participant's name in the Search box. 2. Click on the link to the participant's Contact record. 3. Click on the Intake button. 4. Select the program: Financial Opportunity Center or Tax Preparation, and click on Next. 5. Complete the demographics. 6. Add Household Members, as applicable: Click on Add Row, enter information, and click on Apply. 7. Click on Save. 8. On the Case Record that is generated, click on Edit. 9. Enter information. 10. Click on the Save button. *Note: Only the user who created a Contact can enroll that Contact into a program.

Enroll a Counseling Participant in Tax Prep or vice versa (Create a second Case Record)	1. Search for a portion of the participant’s name in the Search box. 2. Click on the link to the participant’s Contact record. 3. Click on the Intake button. 4. Select the program in which you need to enroll the participant: Financial Opportunity Center or Tax Preparation, and click on Next. 5. Complete the demographics, as applicable. 6. Add Household Members, as applicable: Click on Add Row, enter information, and click on Apply. 7. Click on Save. 8. On the Case Record that is generated, click on Edit. 9. Enter information. 10. Click on the Save button.
Go to a Participant’s Case Record	1. Search for a portion of the participant’s name in the Search box. 2. Click on the participant’s Case Record in the appropriate program. OR 1. Click on a link to the participant’s Case Record in the appropriate program anywhere on your screen (e.g. under Recent Items on the left, in the top right corner of an Employment Record, etc.)
Enter a Service Entry for Counseling Service(s) and/or Work/Education Supports for an Individual Participant	1. Go to the participant’s FOC Case Record. 2. Click on the Record Service button (or hover over the Service Entries link and click on the New Service Entry button. 3. Choose the appropriate service area. 4. Click on the Next button. 5. Complete the appropriate fields. (The UOS field is optional. Only fill in the Staff Person field if you are entering services on behalf of someone else.) 6. To expand a particular counseling topic, click on the triangle to the left of the service. (You must expand the Employment Search topic twice.) 7. To add a note, click on the Add Row button at the bottom. Enter your note, and click on the Apply button. Then click on the Save button. 8. If you need to enter more than one of the same counseling topic (e.g. when a participant has two delinquent bills), 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. 9. *If you get an error message when trying to record a note on the Service Entry, skip clicking on the Apply button, and click directly on the Save button. If this still does not work, save the Service Entry without the progress note. Then follow these instructions: a. Go to the participant’s FOC Case Record. b. Hover over the Service Entries link. c. Highlight and copy the Service Entry # (“ServiceEntry-XXXX”) of the Service Entry to which you want to add a note. d. Hover over the Progress Notes link. e. Click on the New Progress Note button. f. Enter the date and the note. g. Paste the Service Entry # (“ServiceEntry-XXXX”) into the Service Entry field. h. Click on the Save button.

Create a Baseline or Subsequent Financial Health Assessment	1. Go to the participant's FOC Case Record. 2. Hover over the Assessment link. 3. Click on the Financial Health button. 4. Enter the date of the assessment and complete all the fields except the "Financial well-being score". 5. Click on the Save button. 6. Check the "Financial Well-Being Response Value" and click on the FWB Scale Scoring Worksheet link in the bottom left under Financial Health Assessments. 7. Use the "Financial Well-Being Response Value" to figure the participant's Financial well-being score. 8. On the participant's Financial Health assessment you just created, click on the Edit button. Enter the "Financial well-being score." 9. Click on the Save button.
Create a Baseline Test, Budget, Balance Sheet, or Credit Report Assessment	1. Go to the participant's FOC Case Record. 2. Hover over the Assessment link. 3. Click on the button for the assessment you need to create. 4. Enter the date of the assessment and fill in the appropriate fields. 5. Click on the Save button.
Create a Subsequent Test, Budget, Balance Sheet, or Credit Report Assessment	1. Go to the participant's FOC Case Record. 2. Hover over the Assessment link. 3. Click on the link for the Latest version of the assessment in question in the Assessment # column. 4. Click on the Clone button. 5. Enter the date of the assessment and update all the appropriate fields. 6. Click on the Save button.
Create an Action Plan (formerly Vision)	1. Go to the participant's FOC Case Record. 2. Hover over the Action Plans link. 3. Click on the New Action Plan button. 4. Enter the Start Date and the Vision Narrative (formerly the "Big Vision"). 5. Click on the Quick Save button. 6. Click on the ECM Goals tab. 7. Click on the New ECM Goal button. 8. Fill in the applicable fields, and click on the Save button. 9. Click on the Save button. 10. *If you need to use the Save or Cancel buttons, but they do not work, simply click on the Quick Save button and navigate away from the Action Plan by using the Search box or clicking on another tab.
Update an Action Plan (formerly Vision)	1. Go to the participant's FOC Case Record. 2. Hover over the Action Plans link. 3. Click on the link in the Action Plan # column. 4. Update/add to any fields on the Action Plan tab and/or ECM Goals tab, as applicable. 5. Click on the Save button. 6. *If you need to use the Cancel button but it does not work, simply click on the Quick Save button and navigate away from the Action Plan by using the Search box or clicking on another tab.

Add an Entity	1. Search for a portion of the entity's name in the Search box. 2. If the entity is not already in the database, click on the Entities tab at the top of the screen. 3. Click on the New button. 4. Choose Entity as the Type of new record. 5. Complete at least the fields in red. You may select as many Entity types as appropriate. If one of those types is Educational Institution, complete the Educational Institution Type field. The rest of the fields are optional. 6. Click on the Save button.
Add an Employment Record	1. Go to the participant's FOC Case Record. 2. Hover over the Employment link. 3. Click on the New Employment button. 4. Fill in all the fields except for those in the Job Termination section. The Notes section is optional. 5. Click on the Save button.
Record Retention Verification and/or Changes to an Employment Record	1. Go to the participant's FOC Case Record. 2. Hover over the Employment link. 3. Click on the link for the job in question in the Employment Name column. 4. Click on the New Advancement button at the bottom of the screen. (Note: The Advancement screen is the place to record all changes to employment except termination, regardless of whether the change is actually an advancement.) 5. Fill in the date of contact in the Date field. 6. Enter who the contact is with. 7. Enter as many Statuses as appropriate. 8. If a Status indicates a change in employment, fill in the date that the change occurred in the Date of change in employment field, and enter the updated information in any of the appropriate fields in the Employment Update section. 9. If a Status indicates retention verification, fill in the fields in the Retention Milestones section. 10. The Notes field is optional. 11. Click on the Save button.
Exit an Employment Record	1. Go to the participant's FOC Case Record. 2. Hover over the Employment link. 3. Click on the link for the job in question in the Employment Name column. 4. Choose one of the following options: A. Click on the Edit button. Fill in the fields in the Job Termination section. Click on the Save button. OR B. Hover over the Job End Date field. Double click on the pencil icon. Enter the termination date. Hover over the Reason for Termination field. Double click on the pencil icon. Enter the termination reason. Click on the Save button.

Add an Education/Training Program Record	1. Go to the participant's FOC Case Record. 2. Hover over the Education link. 3. Click on the Education/Training Program button. 4. Fill in the appropriate fields. Do not fill in the Exit section unless the client's participation in the Education/Training Program has ended. The Bridges to Career Opportunities (and similar programs) section is required for BCO programs and optional for all others. The Notes section is optional. 5. Click on the Save button.
Record Retention Verification and/or an Update to the Education/Training Program Record	1. Go to the participant's FOC Case Record. 2. Hover over the Education link. 3. Click on the link for the Education/Training Program in question in the Education # column. 4. Click on the New Education Progress button at the bottom. 5. Complete the appropriate fields. 6. Click on the Save button.
Exit an Education/Training Placement Record	1. Go to the participant's FOC Case Record. 2. Hover over the Education link. 3. Click on the link for the Education/Training Program in question in the Education # column. 4. Choose one of the following options: A. Click on the Edit button. Fill in the fields in the Exit section. Click on the Save button. OR B. Hover over the End date field. Double click on the pencil icon. Enter the end date. Hover over the Exit status field. Double click on the pencil icon. Enter the appropriate status. If the Exit status is "Exited early from program", hover over the Reason(s) for early exit field. Double click on the pencil icon. Double click on the reason(s) and click on the OK button. If any of the reason(s) is "Other", hover over the Other reason for early exit field. Double click on the pencil icon. Type in the reason. Click on the Save button.
Make a Referral	1. Go to the participant's FOC Case Record. 2. Hover over the Outbound Referrals link. 3. Click on the New Outbound Referral button. 4. Complete the appropriate fields. 5. Click on the Save button.
Update the Status of a Referral	1. Go to the participant's FOC Case Record. 2. Hover over the Outbound Referrals link. 3. Click on the referral in question in the Outbound Referral # column. 4. Click on the New Referral Update button at the bottom. 5. Complete the fields. 6. Click on the Save button.
Record a Tax Return Assessment	1. Go to the participant's Tax Preparation Case Record. 2. Hover over the Assessment link. 3. Click on the Tax Return button. 4. Fill in the date of the assessment and fill in the appropriate fields. 5. Click on the Save button.

Add a Participant to a Group for Reporting	1. Go to the participant's Case Record. 2. Click on Edit. 3. Select Group(s) for reporting. 4. Click on Save.
Edit a Participant's Demographic Information or Add Another Household Member	1. Go to the participant's Case Record. 2. Click on the Edit Intake button. 3. Edit/add the necessary information. 4. Click on the Save button.
Edit a Participant's Case Record, Employment Record, Education/Training Program Record, etc.	1. Go to the record you need to edit. 2. Choose one of the following options: A. Click on the Edit button. Edit/add the necessary information. Click on the Save button. OR B. Hover over the field you need to edit. Double click on the pencil icon. Enter the necessary information. Click on the Save button.
Record Work/Education Supports for a Group	1. Click on the Groups & Classes tab at the top of the screen. 2. Click on the New button. 3. Enter the group's name, the Program (Financial Opportunity Center), the Service (Work/Education Supports of Group / Class Service Type), and your Home Site. Select both "Enrolled Clients" and "Clients" in Type of Client. Click on the Save button. 4. Click on the Schedule Session button. Select the appropriate Reoccurrence and fill in the appropriate fields as applicable. Click on the Save button. 5. Click on the Add Clients button. Select the Type of Client ("Enrolled Clients" for those who are enrolled in the FOC and therefore have an FOC Case Record; "Clients" for those who are not fully enrolled in the FOC and only have a Contact Record). a. If you select "Enrolled Clients", select "Financial Opportunity Center" in the Program drop down menu. b. If you select "Clients", you may leave the Program field blank. 6. Enter any part of your participant's name, and click on the Search button. If you want to see a list of all available clients to add multiple participants at once, leave the name fields blank before clicking on the Search button. 7. Check off the participant(s) to be added to the group, and click on the Save button. Then click on the Close button. a. If you need to add both "Enrolled Clients" and "Clients" to your group, simply repeat steps 5-7, once for "Enrolled Clients" and once for "Clients". 8. Record a work/education support by clicking on the Edit link next to your session. Ignore the Status and Client Attendance fields. Enter the number of minutes spent on each participant in the UOS field, enter a progress note if applicable, select the Work/Education Support type from the dropdown menu, enter the value of the work/education support, and click on the Save button.

Record Workshop Attendance	1. Click on the Groups & Classes tab at the top of the screen. 2. Click on the New button. 3. Enter the group's name, the Program (Financial Opportunity Center), the Service (Workshop/Class), and your Home Site. Select both "Enrolled Clients" and "Clients" in Type of Client. Click on the Save button. 4. Click on the Schedule Session button. Select the appropriate Reoccurrence and date(s), enter Duration in minutes, and enter the Workshop Details (Type of Workshop/Class, Topic/Course (optional), Curriculum Developer/Owner, and Workshop Facilitator (optional)). Click on the Save button. 5. Click on the Add Clients button. Select the Type of Client ("Enrolled Clients" for those who are enrolled in the FOC and therefore have an FOC Case Record; "Clients" for those who are not fully enrolled in the FOC and only have a Contact Record). a. If you select "Enrolled Clients", select "Financial Opportunity Center" in the Program drop down menu. b. If you select "Clients", you may leave the Program field blank. 6. Enter any part of your participant's name, and click on the Search button. If you want to see a list of all available clients to add multiple participants at once, leave the name fields blank before clicking on the Search button. 7. Check off the participant(s) to be added to the group, and click on the Save button. Then click on the Close button. a. If you need to add both "Enrolled Clients" and "Clients" to your group, simply repeat steps 5-7, once for "Enrolled Clients" and once for "Clients". 8. Record attendance by clicking on the Edit link next to your workshop/class. Update the Status to "Recorded Attendance", enter the Duration in minutes, update the Workshop Details as applicable, enter the minutes attended for each participant in the UOS field, enter Progress Notes as applicable, select the appropriate Client Attendance status for each participant, and click on the Save button.

Track Resource Room Usage	1. Click on the Groups & Classes tab at the top of the screen. 2. Click on the New button. 3. Enter the group's name, the Program (Financial Opportunity Center), the Service (Resource Room Activities), and your Home Site. Select both "Enrolled Clients" and "Clients" in Type of Client. Click on the Save button. 4. Click on the Schedule Session button. Enter the date, and click on the Save button. 5. Click on the Add Clients button. Select the Type of Client ("Enrolled Clients" for those who are enrolled in the FOC and therefore have an FOC Case Record; "Clients" for those who are not fully enrolled in the FOC and only have a Contact Record). a. If you select "Enrolled Clients", select "Financial Opportunity Center" in the Program drop down menu. b. If you select "Clients", you may leave the Program field blank. 6. Enter any part of your participant's name, and click on the Search button. If you want to see a list of all available clients to add multiple participants at once, leave the name fields blank before clicking on the Search button. 7. Check off the participant(s) to be added to the group, and click on the Save button. Then click on the Close button. a. If you need to add both "Enrolled Clients" and "Clients" to your group, simply repeat steps 5-7, once for "Enrolled Clients" and once for "Clients". 8. Record resource room activities by clicking on the Edit link next to your session. Update the Status to "Recorded Attendance", enter the minutes attended for each participant in the UOS field, enter Progress Notes as applicable, select the appropriate Client Attendance status for each participant, select the appropriate Resource Room Activities for each participant (optional), and click on the Save button.
Delete a Record Entered in Error	1. Only Home Site Administrators have access to delete records. 2. Go to the participant's Case Record. 3. Hover over the section with the erroneous record. 4. Click on the Del link in the Action column. 5. Click on OK.

Common Errors:

- Entering duplicate clients into the system.
- Selecting "Edit" instead of "Clone" when there is a change in a client's finances to be recorded. "Edit" is to correct errors in an assessment, not to record changes.
- Forgetting to enter a new date in the cloned assessment.